A FRAMEWORK FOR A MULTI-YEAR DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL AND GAS INDUSTRY

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A

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Abstract

The Alaska Oil & Gas industry has a limited labor pool which creates a high demand for talented individuals. As a result competition is fierce among the companies in the Alaska's Oil and Gas industry. Furthermore, companies devote considerable resources to recruiting and training talent, only to see individuals leave for a competitor or Alaska altogether; individuals who exhibit potential for leadership are difficult to retain. Individuals with experience in all aspects of Arctic projects, from engineering through operations, are in high demand. Despite this, some of largest employers in Alaska do not have solidified long term programs for developing talent in these areas. There is a need for the contractor companies in Alaska's Oil & Gas industry to develop and implement a plan which would ultimately result in the retention of talented, skilled employees.

This project produced a framework which can be utilized by companies to implement competitive multi-year development programs specific to the unique Alaska Oil & Gas contractor industry. The produced framework focused on job movement with aspects of mentorship and applicable higher education. Through use of the this framework, employees would become highly trained and dedicated to their Alaska Oil & Gas employer as they received high quality and diverse experiences while developing long term relationships with mentors dedicated to the success of the participant and Alaska's economy. The primary outcome of framework implementation would be increased retention of high potential individuals. The desired secondary outcomes would be a more knowledgeable work force and increased cross business collaboration.

Keywords: Alaska, North Slope, Construction, Oil & Gas, Retention, Employee Development, Training, Job Rotation, Mentorship, Career Development

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686B Final Deliverables Coversheet (READ FIRST)

This cover sheet describes where to find each of the 686B final deliverables:

- Final Project Report is included in '(1) RLoomis 686B Final – Final Project Report.pdf'
- Final Presentation Slides are included in '(2) RLoomis 686B Final – Presentation Slides.pdf'
- Lessons Learned is included in '(3) RLoomis 686B Final – Lessons Learned.pdf'
- Knowledge Area Narrative is included in '(4) RLoomis 686B Final – Knowledge Areas.pdf'
- Updated Project Management Plan is included in '(5) RLoomis 686B Final – PMP.pdf'
- Project Charter is included in '(6) RLoomis 686B Final – Project Charter.pdf'
- Sponsorship Letter is included in '(7) RLoomis 686B Final – Letter of Sponsorship.pdf'

A FRAMEWORK FOR A MULTI-YEAR DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL & GAS INDUSTRY

Introduction

Project Purpose and Deliverables

The Alaska Oil & Gas industry has a limited labor pool which creates a high demand for talented individuals. Furthermore, individuals who exhibit potential for leadership are difficult to retain. Individuals with experience in all aspects of Arctic Oil & Gas construction, from engineering through operations, are in high demand. Despite this, some of largest employers in Alaska do not have solidified long term programs for developing talent in these areas. There is considerable need for the contractor companies in Alaska's Oil and Gas Industry to develop and implement a plan which will ultimately result in the retention of talented, skilled employees. This project produced a framework which can be utilized by companies to implement competitive multi-year development programs specific to the unique Alaska Oil & Gas industry. Key aspects of the framework are job movement, mentorship best practices, and applicable higher education.

Research was conducted to support development of the following deliverables:

- A framework for a multi-year development program tailored to the Alaska Oil & Gas Industry.
- A final presentation for all involved stakeholders.

Project Objective

This project produced a framework which can be utilized by companies to implement competitive long term development programs specific to the unique Alaska Oil & Gas industry. If the project deliverables are implemented the desired outcomes are increased retention of high potential individuals, a more knowledgeable work force and increased cross business collaboration.

Methodology

Stakeholder Identification

Research for this project began with identification of the project sponsor. With the assistance of the project sponsor, key stakeholders were identified. Stakeholders were categorized as either internal or external stakeholders. Internal stakeholders are directly involved with the project, while external stakeholders are not. The influence and interest of each stakeholder was determined and the result of the power to interest ratio graphed. Early identification of stakeholders was key to the success of the project. Appendix A contains a full list of stakeholders, complete with internal/external, influence, and interest classifications. To maintain anonymity and confidentiality, twelve subject matter experts (SMEs) have been consolidated into three stakeholder groups.

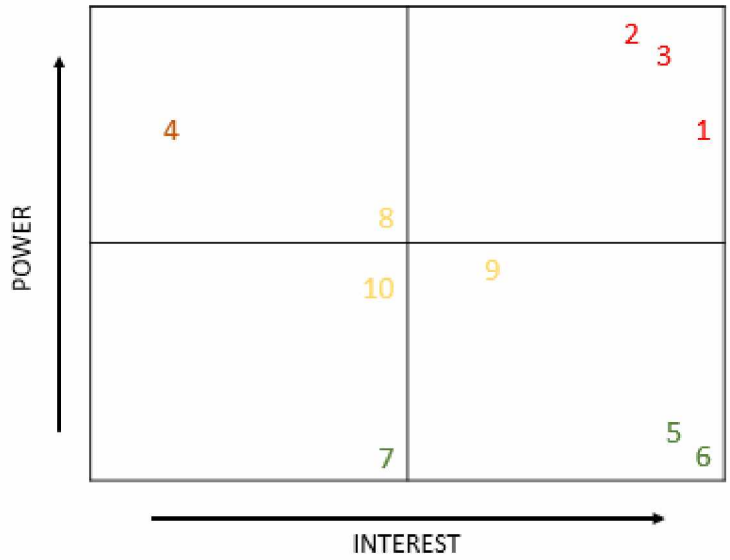

Exhibit 1: Stakeholder Power Interest Grid (Source: Ryan Loomis)

Exhibit 1 shows the distribution of all stakeholders' power and interest in the project. Those determined to have high power and/or interest were involved early in the planning stage. The input and insight from these key stakeholders was critical in the development of a clear scope statement and project charter. In addition these critical stakeholders, as identified in red in Exhibit 1, were engaged at regular intervals throughout project execution.

Stakeholders with lower power and interest were engaged after the project scope was established and were then provided status updates as needed.

Project Scope

A project scope statement was drafted utilizing key stakeholder input. The scope statement outlined project deliverables and exclusions. The finalized scope statement is as follows.

This project produced three deliverables:

1. A project management plan detailing exactly how the project was executed.
2. A final project report.
3. A framework for a multi-year development program targeting high potential individuals in the Alaska Oil & Gas industry. The produced framework focuses on job movement every 18-24 months. Additionally this framework incorporates mentorship best practices and applicable higher education. The framework came from analysis of a compilation of sources, including self-conducted literature reviews and interviews with relevant individuals.

The planning of this project began August 29th, 2014 with the execution completed by December 15st, 2015.

This project excludes the following:

- This project did not include implementation of the development program.
- This framework is not tailored to a specific company, resource, or individual.
- This project did not include a training associated with applying or handing off the documentation.
- This project did not include a financial breakdown or cost analysis.
- There was no real world test on the effectiveness of the designed program.

Research Approach

Project research began with a literature review of existing documents. Upon completion of this literature review a research proposal to add to the existing body of knowledge was drafted. Once the research proposal was approved interviews were conducted with SMEs.

Research approval. Prior to beginning research, the project manager was required to obtain approval from the University of Alaska Anchorage Institutional Review Board (IRB). To obtain approval the project manager compiled a submittal package containing an IRB Submission Form, Interview Consent Form, and Interview Protocols. The Interview protocols contained question sets for the three categories of SMEs: managers, potential participants, and program executors. The approved IRB submission package is included in Appendix B, approved survey consent form is included in Appendix C, and question sets are provided in Appendices D, E and F. This project includes a literature review of existing programs and publications, and interviews with SMEs.

Interview execution. With the assistance of the project sponsor, the project manager gathered a list of SMEs to target for interviews. This list was compiled based on three key factors. First the project manager identified managers who would potentially support a multi-year development program. Second, the project manager identified high potential individuals who would directly participate in such a program. Finally the project manager looked for individuals who have executed similar programs in the past. A similar program was defined as a structured and documented program focused on professional development lasting longer than 6 months. For managers and potential participants in a development program, target individuals were employed by contractor organizations in Alaska's Oil & Gas industry. For existing programs a broader group was defined, incorporating experts from producer companies and non-industry specific programs.

All interviewees were emailed a consent form and list of interview questions the day prior to the interview. Signed consent forms were received from all interviewees prior to beginning the interview. All interviews were conducted in person with notes taken on the project manager's computer. Follow-up questions and clarifications were handled via email or in person, with all documents saved on the project manager's computer.

12 Interviews were held, with some interviewees responding to multiple question sets. The subjects interviewed had of the following expertise:

- 8 Managers;
- 4 Potential participants;
- 2 Executors of similar programs.

Initially the project set a goal of 15 interviews out of 20 targeted potential sources. However, due to time constraints and other logistical considerations, 12 interviews were conducted with SMEs. The 12 completed interviews were deemed sufficient to provide data input to the framework. The project manager coded each transcript and then broke out the transcripts into common themes.

Literature Review

Introduction

The literature review for this project specifically targeted documentation containing aspects relevant to a multi-year development program for high potential individuals in an Alaska Oil & Gas contractor company. Documentation was identified specifically pertaining to existing programs, understanding generational differences affecting mentorship, understanding career paths, and assessment options.

Existing Programs

Two programs currently existing in the Alaska Oil & Gas industry were identified and reviewed. Both programs contain aspects applicable to a multi-year development program for an Alaskan contractor company. No existing multi-year program related to employee development and retention was identified within an Alaskan contractor company. Due to proprietary and confidential information the sources and specific details of both existing programs are anonymous.

Multi-year, global program. A similar program operated by an Oil & Gas production company was reviewed. This program was multi-year with participants moving globally for job opportunities predetermined by program management.

The goal of this program was to develop technically competent and autonomous professionals in a specific discipline who understood the broader business goals. This includes

development of discipline competencies and professional skills. The program documentation provides a detailed guide for participants to navigate the program, and includes an overview of the program, discipline specific information, logbook examples, and necessary forms.

Participants in this program typically fill two roles over the course of the program, each for 18 to 24 month. The role duration, type, and quantity varies depending on the individual's needs. Discipline-defined competency levels must be attained to graduate from the program. Participants are expected to earn one promotion during their time in the program. The overall program typically lasts three years and includes a minimum of one field oriented assignment.

A logbook is the primary documentation for proving competency development, and a personal development plan provides the framework for identifying competency gaps and training needs. The format of the log book is determined by the discipline. Despite format, each logged experience must be mapped to applicable desired competencies.

In addition to job rotation, this program included structured training, proactive support/coaching, and regular assessments with feedback. The mentorship aspect of the program, referred to as coaching, includes the supervisor, a technical coach, discipline managers, the Upstream Challenge Programme manager, and regional human resource representative.

Each participant was required to have a detailed individual development plan with a career map. The individual development plan was initially completed upon entry to the program and updated yearly.

The program spent a significant amount of time on formalized training, including discipline specific and non-technical trainings. In addition, there is an offsite mandatory event held for new challenge participants each year, with the primary focus of building a network while gaining exposure to multi-disciplinary teams and techniques.

Single year, local program. An existing program operated by an Alaskan contractor company was reviewed. This program duration was a single year and existed outside of current job assignments. The purpose of this program was to offer accelerated development and knowledge while providing leadership opportunities. This program was a local feeder program for a larger, global program. Included in this program were the development of an extensive

individual development plan, monthly meetings, an ad hoc project, and exposure to corporate leadership.

Participants in this program completed a strengths and weaknesses assessment along with a participant skills overview document. Five mentor meetings were required along with attendance at three mandatory trainings. Participants were grouped into teams who then completed a leadership project and presented the results to executive management. These projects were overseen by a mid to high level manager. To manage the participant's progress, six check-in meetings were scheduled. Additionally, leadership involvement in the local community was required. This took the form of professional society or volunteerism efforts in which a participant was an acknowledge leader.

Existence of these programs is evidence that businesses in Alaska value employee development. Furthermore, these existing programs provide insight into aspects of a successful program, which provides a basis for development of a customized multi-year development framework tailored to contractor companies in Alaska's Oil & Gas industry.

Understanding Generational Differences

Further literature reviews for the project focused on generational aspects of employee development. There are many terms for each generation, with the date ranges for each varying among sources. In this literature review and for this project the generations have been defined according to the book *Generations at Work: Managing the Clash of Boomers, Gen Xers, Gen Yers in the Workplace* by Ron Zemke, Claire Raines, and Bob Filipczak. Traditionalists were born before 1943, Baby Boomers were born between 1943 and 1960, Generation Xers were born between 1960 and 1980, and Millennials were born after 1980. Generation end points overlap by three or four years, however for the sake of clarity the authors have provided concise dates (Zemke, Raines, & Filipczak, 2013).

The Society for Human Resource Management (SHRM) published a survey report in 2004 on generational differences. In the *Generational Differences Survey Report* the survey analyst, Mary Elizabeth Burke, "explored advantages and disadvantages that HR professionals observe due to an intergenerational workforce; the types, frequency and severity of intergenerational conflict in the workplace; and solutions HR professionals use to address and

prevent intergenerational conflict" (Burke, 2004, p. iv). According to this survey the workforces consist of, on average, 10% traditionalists, 44% Baby Boomers, 34% Generation Xers, and 12% Millennials (Burke, 2004, p. v).

While acknowledging a multigenerational workforce is a reality, Burke states the "advantages of an intergenerational workforce outweigh any disadvantages" (p. vii). Quality of work was reported to be higher in intergenerational work environments and good working relationships between generations is "critical in ensuring that ... institutional knowledge is not lost as older workers retire" (Burke, 2004, p. 5). The most common topic of conflict between generations is in regards to the perception of employee dedication. "Older generations may view willingness to work long hours, professionalism and punctuality as defining employee dedication, while younger generations seem more likely to view dedication in relation to the quality and quantity of work completed" (Burke, 2004, p. 4). Conflict also arises from the generational perception of change. Younger generations are eager to challenge the standard way of approaching every situation. Older generations are perceived as slow or reluctant to change and resentful of challenges by younger generations, especially if they perceive their experience is not valued. Many conflicts from work ethic and varying definitions of professionalism manifest in the form of technology. Younger generations are more apt to utilize quickly advancing technologies to supplement work habits or change working methods, which can introduce conflict with older generation's perception of professionalism and a typical work day (Burke, 2004, p. 5). Understanding these generational differences has become more important as it becomes more common for older generations to report to a younger generation manager.

Exhibit 2: Reporting to a Younger Manager (Burke, 2004, p. 6)

Exhibit 2 from the *Generational Differences Survey Report* shows 90% of the 256 respondents have managers younger than their direct reports (Burke, 2004, p. 6). As younger managers oversee older generations, conflicts can arise around communication methods such as phone versus email along with generationally consistent work habits.

In *An Examination of the Role of Age in Mentoring Relationships* authors Finkelstein, Allen, and Rhoton (2003) take their analysis a step beyond reporting relationships and addresses mentorship. Traditional mentoring relationship are described as a senior, experienced individual providing a younger employee with career support, feedback, and direction. While this is still typical Finkelstein, Allen, and Rhoton (2003) discuss the increasingly common situation of mentors younger than the protégé. Benefits of this situation include expanded networking opportunities, increased respect, greater levels of knowledge sharing, and a positive work environment. Difficulties with this type of mentorship relationship come from jealousy of the younger mentor's career and uncertainties of the depth of the mentor's knowledge and experience (pp. 249, 252-255).

A unique aspect of the younger generation is a focus on their own career opposed to the older generation's loyalty to a company. In companies where a substantial amount of high level positions are held by older generations, the younger generations sometimes feel this reduces advancement opportunity, as shown in Exhibit 3.

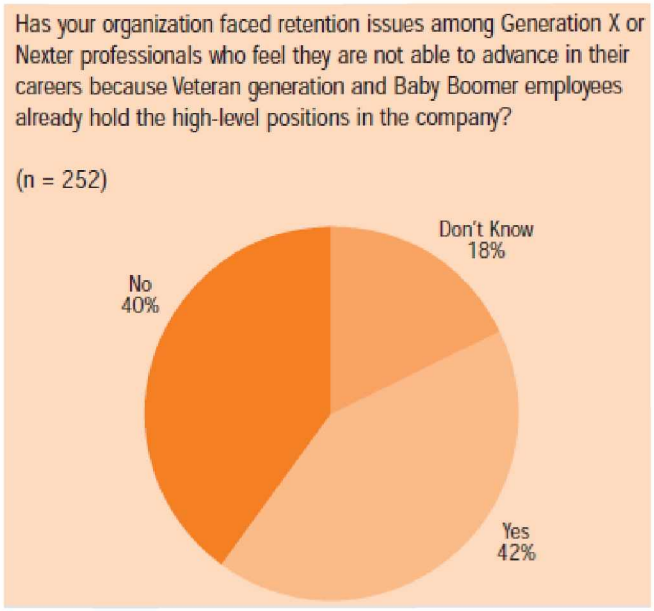

Exhibit 3: Retention of Generation Xers and Millennials (Burke, 2004, p. 8)

Burke identifies 42% of human resource professionals have seen issues with retaining Generation Xers and Millennials due to a lack of advancement opportunities into positions held by the older generations. Furthermore, this picture increases drastically within large organizations of over 500 employees. Almost two thirds of surveyed individuals in companies larger than 500 employees have faced retention challenges among the younger generations (Burke, 2004, p. 9). The Deloitte survey *Talent 2020: Surveying the Talent Paradox from the Employee Perspective* by Kwan, Neveras, Schwartz, Pelster, Erickson, and Szpaichler found, "just over one-quarter of all Millennials surveyed (26%, age 31 and younger) reported that they plan to leave their employers at some time in the next year—the highest of any generational group" (2012, p. 2). As indicated by Burke and the findings of the Deloitte survey, providing Generation Xers and Millennials with a path to advance in the company is critical in their retention.

Insight gained by understanding how generational issues affect employee retention is important to the development of the development program this paper proposes. Mentorship

between generations is one method of bridging the generational divide. Individuals would develop insight into their coworkers, potentially increasing loyalty to those coworkers and the company. With increased exposure and understanding of peers the likelihood of employee engagement and retention increases.

Understanding the Importance of Career Paths

Defined career paths and career ladders provide employees with a method to understand progression options within a company. As defined by Bliss (2015) in the article *Developing Employee Career Paths and Ladders* "career paths encompass varied forms of career progression, including the traditional vertical career ladders, dual career ladders, horizontal career lattices, career progression outside the organization and encore careers" (Bliss, 2015). Bliss discussed how employer provided communication regarding avenues for advancement within a company provides employees with a feeling of engagement while fostering growth. While 73% percent of leadership understands the importance of fostering employee development only 49% of employees report their managers are successful at communicating career path opportunities. While 85% of CEOs state talent management is a business priority only twenty percent report involvement in talent management and only ten percent confer with their board of directors (Bliss, 2015).

Key findings from the Deloitte *Talent 2020: Surveying the Talent Paradox from the Employee Perspective* show 27% of "surveyed employees who are planning to switch companies cited a lack of career progress" (Kwan, et al., 2012, p. 1) as the reason for leaving a company. 21% of respondents cited lack of challenge in the current job as the reason to leave the company. On the other hand, 42% of the respondents cited a promotion or job advancement as the second most popular incentive for employees to stay at their current company (Kwan, et al., 2012, p. 6).

As lack of career progress is a top contributor to turnover, career mapping is a tool suggested. The three steps of career mapping are:

1. Assessment of the individual's knowledge, skills, experiences, and interests.
2. Creating a personalized career map capitalizing on past experience and including potential lateral moves.

3. Continuously exploring job opportunities within a company (Bliss, 2015).

Use of career mapping in combination with job rotation can be highly effective in providing career enrichment. Job rotation is defined as "the systematic movement of employees from job to job within an organization" (Bliss, 2015). In formal development programs, job rotation offers promising employees a comprehensive view of the organization through planned and customized assignments. These rotations can be highly effective in engaging low level employees by providing perspective and variety. Preparation and communication are identified as critical aspects key to the success of any rotational program (Bliss, 2015). Based on findings by Bliss and the Deloitte study, incorporation of career planning and job rotation into a multi-year development program would improve participant engagement in the company while increasing the probability of retaining the individual.

Leadership Assessments

Assessments provide a baseline to build upon and measure results against. Assessments can take multiple forms and are integrated into American society from an early age in the education system. For this literature review a leadership assessment was reviewed for ability to provide a baseline for program performance. While discipline specific assessments tackle technical abilities, leadership assessments identify an individual's strengths and weaknesses in terms applicable to high level management.

The Center for Creative Leadership (2015) offers a 360-degree Leadership Assessment. The Center for Creative Leadership has been involved in hundreds of thousands of leadership assessments. The Center for Creative Leadership claims:

> 360-degree feedback is a method of systematically collecting opinions about an individual's performance from a wide range of coworkers. This could include peers, direct reports, the boss, the boss's peers — along with people outside the organization, such as customers. The benefit of collecting data of this kind is that the person gets to see a panorama of perceptions rather than just self-perception, which affords a more complete picture. (Center for Creative Leadership, 2015)

As explained in the syllabus for the University of Alaska Anchorage course Advanced Leadership, the 360-degree Leadership Assessment provides a "profile that allows participants

to fully understand their performance as a leader. The assessment assists [participants] in raising their awareness of the multiple dimensions of leadership within themselves" (Donson, 2015, p. 2). This type of leadership assessment would be valuable in selecting participants for a development program targeting high potential individuals while simultaneously providing a baseline for measuring participant progress.

Conclusion

While substantial information exists in regards to employee retention, career path development, and development programs, little of the data is specific to contractor companies in Alaska's Oil & Gas industry. There is no existing contractor multi-year development program to utilize, and existing research does not adequately detail the needs and complexities of this industry. As such, this project conducted research on the state of contractor companies in the Alaska Oil & Gas industry along with the concerns and needs of companies in this industry. The results of this research created a new resource specifically taking into account the unique characteristics and needs of Alaskan contractor companies.

Data

Data was collected from twelve interview sources in two question formats – open ended questions and ranking questions. As interviews were completed, bulleted summaries of the transcripts were compared.

Open Ended Questions

For open ended questions, terms and ideas common to more than one interview were identified. As interviews progressed, each interview was compared to prior interviews to identify additional commonalities. Once all twelve interviews were completed and all commonalities identified, each was quantified by number of SMEs expressing that idea. These common terms and thoughts were then grouped into themes with supporting ideas. Each theme and associated ideas was ranked by number of occurrences.

Ranking Questions

Ranking questions were presented to SMEs using a scale of one to ten with one meaning irrelevant and ten meaning important. These results were then placed on a line graph. By utilizing the line graph, answers were analyzed for frequency and grouping.

Findings

Analysis of the interview data resulted in themes fitting within two categories: the current state of the Alaska Oil & Gas contractor industry and the features of a multi-year development program specific to the Alaska Oil & Gas contractor industry. Within each category common questions/topics were identified.

State of the Alaska Oil & Gas contractor industry

- Why do individuals stay or leave a company?
- What is important for career growth and achieving success?
- What roadblocks to advancement exist in the Alaska Oil & Gas industry?
- Is higher education viewed as necessary for career progression?
- What are some mentorship lessons learned for contractors in Alaska's Oil & Gas industry?

Multi-year development program

- What components should a multi-year development program for contractors in Alaska's Oil & Gas industry include?
- What are the desired outcomes/benefits of such a program?
- Are there barriers to execution/implementation?

In addition, every SME was asked the following question:

On a scale of 1-10, how important are formal development opportunities to growing and *retaining an individual?*

SMEs answered this question in one of two ways. They either spoke to the value they personally place on formal development opportunities in their own careers or to the value they believe others around them place on formal development. These results were graphed on two separate line charts.

State of the Alaska Oil & Gas Contractor Industry

SMEs discussed their experiences in the Alaska Oil & Gas industry. Common themes identified in these responses were factors contributing to staying at or leaving a company, characteristics the SMEs possess that allowed them to succeed in this industry, and roadblocks to success specific to contractors in the Alaska Oil & Gas industry.

Factors enticing individuals to stay at a company. After interviewing many qualified SMEs with a variety of experiences and tenures common themes emerged.

58% of all SMEs cited challenges and opportunities as a reason they stay with their current employer. Specifically, challenges and opportunities ranged from a series of progressive roles within a single project to managing a diverse range of projects or the opportunity to be involved in multiple disciplines within a project. Additionally, all of those SMEs specifically valued exposure to multiple business areas and roles. Furthermore, SMEs working for companies that offered multiple services in an industry or across multiple industries valued the opportunity to be engaged in multiple business sectors.

Another factor relating to employee retention cited by 58% of SMEs was fair compensation. The belief that the current benefit package was competitive in the current market was strengthened by periodic offers received from headhunters offering weaker compensation packages. SMEs felt fair compensation included factors such as benefits and progressive career opportunities in addition to a competitive salary. Employee retention was not impacted by salary alone, but rather overall compensation and perceived career growth opportunities.

The personal relationships an employee built within a company was another factor related to retention, as mentioned by 50% of SMEs. Specifically, loyalty to either an individual, an expectation, or a work commitment. Of these SMEs, half mentioned their direct supervisor by name as a determining factor.

Finally, job satisfaction was a factor related to job commitment brought up by over a third of all SMEs. SMEs specifically focused on a clear feeling of contributing to company success, enjoyment of the work, and strong communication from leadership that the employee was valued.

Factors leading individuals to leave a company. In line with factors enticing individuals to remain at a company, fully 58% of SMEs cited lack of challenge as a reason they have left employers in the past. This took many forms, including a combination of limited/stagnant career growth with the current employer coupled with apparent new and exciting opportunities elsewhere. Two managers specifically mentioned hitting the proverbial glass ceiling; due to

education, supervision, or culture, they perceived no further advancement opportunities existed within their current company.

A third of SMEs ceased employment with a company due to actual or perceived risk to their employment status. Of these SMEs, 60% left companies due to job elimination by layoff or bankruptcy. Another 40% of the SMEs left jobs due to the belief their long term employability was at risk as the result of changing company objectives or projects ending.

A shift in the overall company focus was the primary reason senior managers left a company. This included elimination of part of the organization, a disagreement regarding the direction the company was taking, or a belief the company was harming itself due to a culture of bad business rules and political decisions.

Characteristics important to success. When asked to identify a single or set of top factors contributing to success, two thirds of all SMEs attributed success to personality and maturity. Specifically work ethic was cited by half of these SMEs. These SMEs stated their desire to take on a challenge, get the job done, and deliver on commitments as factors critical to success. In addition to work ethic, entrepreneurial spirit was a common theme which focused around the desire to constantly improve one's career position by improving the company. Other personal and maturity factors mentioned were enthusiasm and humbleness.

Broad exposure to multiple aspects of a project, industry, and roles was mentioned by 50% of SMEs as a factor related to success. This included the flexibility to move locations and the ability to learn skills first hand.

Another factor to success cited by 50% of SMEs mentioned related to a support network. Half of these SMEs mentioned having worked for managers who empowered them, provided autonomy, growth, challenges, and recognition. In addition, half mentioned a strong network of both internal and external relationships which provided a broad set of resources to tap into for support and information. Also mentioned was identification of the right mentor, and working for leaders who have experience doing the jobs they are managing.

Communication skills was a success factor mentioned by 33% of SMEs, including the ability to manage confrontation. Specific examples included managing a client, having the courage to say and do the 'right' thing, or being persistent when pursuing an answer or result.

Additionally, the ability to ask questions, regardless of the apparent simplicity, and then listening to people was also mentioned by a SME.

Roadblocks to success in the Alaska Oil & Gas contractor industry. Roadblocks to success identified by SMEs fell into three interrelated categories: Alaska is a small, remote, and isolated market; bureaucracy; and the individual themselves.

While many of the contractor companies in the Oil & Gas industry are Alaska's largest companies, the employee head count is relatively small. As such, Alaska doesn't offer as many opportunities for employment as other locations in the United States and globally. Half of all SMEs referenced the limits associated with the small market. There is a small set of players and talent competing for limited managerial positions. Additionally, this market type creates a bureaucratic culture in which it is hard to break into the industry, and cross barriers (roles, projects, etc.) within the industry. The consensus among SMEs is contractor companies in Alaska's Oil & Gas industry do not foster much in the way of cross business group collaboration. Despite offering many services in many different industries, contractor companies operate their Oil & Gas support services in distinct silos.

Multiple SMEs indicated Alaska is an isolated market, and as a result there are bureaucratic undercurrents which keep individuals from advancing. 58% of SMEs spoke at great length of the "Good ol' boy" culture permeating the Alaska Oil & Gas industry, which limits opportunities for all but a select few. This culture also results in examples of individuals who have a role based on nepotism over skillset and value. As managers hire people they know and trust, positions are often filled prior to formally being opened. Concern was expressed by these SMEs that many managers have their role because they have always had that role, with little regard for performance, advancement, and achievement. Two additional SMEs discussed "blockers", or individuals who have no intention of moving beyond their current management role. These managers create a plug or block in the flow of talent, forcing competent subordinates to either change careers/companies or be content at their current level. An additional two SMEs addressed the subject of pigeonholing. Pigeonholing occurs when an individual is unable to advance because they are stuck in a specific role by a manager. This occurs when managers are primary motivated by a desire to keep an individual in a specific role

because the job gets done, rather than developing and supporting an employee's long term potential. When there is a limited amount of competent people to do a specific role, managers can become hesitant to advance the individual as that position would be hard to fill. On top of the 'in crowd' culture and small talent pool, the geographical isolation associated with the North Slope can result in an out of sight out of mind mentality for management in the home offices often based in Anchorage or out of state.

One SME made the statement "the greatest roadblock to advancement is the person themselves." This SME's sentiment was echoed by a third of all interviewed SMEs. These SMEs spoke at great length of the initiative required to seek out the next opportunity or assignment. Individuals need to make themselves and their goals visible, something two SMEs mentioned can be difficult for introverted individuals.

Importance of Formal Development Opportunities

All SMEs were asked the following question:

> On a scale of 1-10, how important are formal development opportunities in growing and retaining an individual?

SMEs addressed this question in two ways – as it pertains to themselves and as they believe it pertains to others. Exhibit 4 shows most SMEs believe formal development opportunities are important for others.

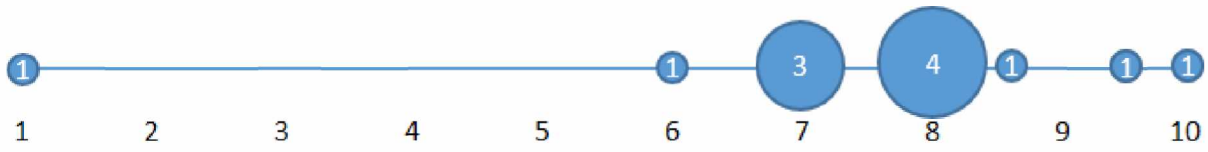

Exhibit 4: Importance of Formal Development Opportunities in Growing and Retaining Other Individuals (Source: Ryan Loomis)

While SMEs found formal development opportunities to be important in retaining and growing high potential individuals, not all SMEs found formal development opportunities to be a factor in their own retention and success.

Exhibit 5: Importance of Formal Development Opportunities in Growing and Retaining Oneself (Source: Ryan Loomis)

As indicated in Exhibit 5, SMEs ranking development opportunities high for themselves and others spoke at length about utilizing formalized programs to increase technological expertise while challenging employees. Offering a formalized program gives an impression of investment to those participating, increasing the likelihood they will stay with the company.

Among SMEs classified as managers an interesting discrepancy between results appeared. One SME clarified these formalized opportunities are good for high potential individuals with ambition for executive leadership, whereas individuals who are high performing without the drive for executive management roles will get less value from a formalized development opportunity. Five SMEs felt formal development opportunities were not important for themselves, while another two were somewhat indifferent toward formalized development trainings, stating the opportunities to learn by trial and error while contributing was more important.

Multi-Year Development Program

SMEs discussed how a multi-year development program would work in an Alaska Oil & Gas contractor company. SMEs identified specific components necessary for a program to be successful. Duration of a both the program and the job assignments within the program was a common topic. Benefits resulting from an effective program were identified, along with barriers for implementation and long term success of the program.

Components. Key components of a multi-year development program targeting high potential individuals, as identified by SMEs, are:

- Exposure
- Accountability
- Personalization

- Mentorship
- Education/Training

Exposure. Exposure to a range of experiences was discussed by all SMEs. A third of SMEs addressed at length the importance of exposure to multiple departments and roles. Two SMEs specified that in addition to field experience, participants of a multi-year development program should have exposure to the support functions such as HR, procurement, finance, legal, and business development. In addition participants would need to spend enough time in a position to learn, improve, and transition.

Half of SMEs discussed the value of exposure to a diverse range of individuals. This is obtained through trainings, travel opportunities, ad hoc projects outside of the current project or home office, and communication of the participants names across departments and locations.

Ad hoc tasks and projects outside of the everyday assignment was discussed in length by six SMEs. These one-off projects provide participants the opportunity to lead. This was deemed important as participants would need to spend some time as a leader, be responsible for delivering results safety, and take ownership of an outcome. This gives participants a chance to struggle, overcome challenges, and learn new skills while gaining exposure to new parts of the business. According to three SMEs, these ad hoc projects are important because they also provided a teambuilding experience both within and outside of the company. A participant gains experience communicating with a diverse range of individuals in various disciplines and in community outreach exercises.

Accountability. SMEs familiar with execution of development programs spoke of the need for participant accountability. In addition, two participant level SMEs spoke of frustrations associated with lack of evidence to support achievements in prior experiences. The consensus of these SMEs is a program must have a structured communication plan, regularly scheduled check-ins, and some form of follow-up to ensure participants are adequately achieving program components. Structured review of individual development plans every six months was suggested.

SMEs also stated the program must also be accountable to the participants. Trainings need to fit the needs of the individual. Program management should schedule regular check-ins to ensure the program is meeting the expectations of participants. The program must provide participants measureable and attainable goals with clear a definition of success.

Personalization. All SMEs agreed that a multi-year development program targeting high potential individuals would need to be highly personalized.

SMEs discussed the importance of a well-developed, dynamic, and customized plan as the basis for determining the details of the program for a participant. For each individual participant the effort needs to be invested to discern what that individual really wants to do with their career. Once these end goals are identified, a clear development plan needs developed mapping the path from the current state to the future state. Along this path, attainable milestone goals should be identified. At predetermined intervals the goals, roadmap, and milestone achievements need to be evaluated. A periodic and predictable evaluation is critical as it helps keep the participant focused while allowing the roadmap for the participant to evolve as the participants' career progresses. Incorporated in the plan needs to be trainings, which should be directly applicable to current role and desired goals.

According to SMEs, a roadmap extending beyond the duration of the program is critical to the success of a multi-year development program. The program should include experiences and tools to navigate and advance along a desired path, and a roadmap developed with senior management should provide a guide to reach long term goals. Extending this map beyond the end of a program will enhance retention of employees.

Mentorship. Half of SMEs attested to the need for mentorship integration into a multi-year development program. Three primary types of mentors were identified as crucial.

The first was a mentor with technical knowledge and the authority to assist the participant. Participants need to have a mentor available to reach out to in a safe environment for current project/position advice. This mentor would provide a safety net, allowing the participant to dive into stretch assignments and risk failure without compromising the task, project, program, or company. In this way the technical mentor would allow the participant to

learn through action and mistakes. Learning in this way would allow the participant to learn new topics and skills at an accelerated speed with the support of the technical mentor.

The second type of mentor identified was someone unassociated with the participant's current chain of command, or high enough in the chain of command to be removed from the participant's current role. This mentor should be a senior individual in the company with a broad understanding of how the company and industry functions. This senior mentor would help structure and define the participant's goals, plans, and ambitions.

The final type of mentor is a single area mentor. Single area mentors provide a single type of support in an area the protégés is weak, such as a technical skill or leadership proficiency. SMEs provided the following examples: organizational and cultural change, business acumen, and work-life balance. This mentor relationship could be informal, similar to coaching. Participants can be mentored by watching someone they are close to and learning from the mentor's actions. This type of information mentoring relationship allows participants to learn both from what people do right and what people do wrong.

In light of the various types of mentor relationship, SMEs shared their experiences with mentorship, including what worked well and what did not. A formalized mentorship structure was identified as a best practice by five SMEs. These SMEs stated there should be formal acknowledgement of the mentor relationship. Mentorship meetings should occur regularly and the topics identified beforehand. Three SMEs suggested planned monthly meetings, with reoccurring calendar meetings. At each meeting the protégé should have a clear idea of what value they need to get out of the meeting. The protégé's development actions and progress should be discussed and long term plan reviewed. At the onset of the mentor/protégé relationship the mentor needs to be engaged in the protégé's roadmap. If a roadmap or development plan does not exist, the mentor and protégé should develop one together, clearly identifying stopping points, reevaluation flags, and educational requirements.

Four SMEs spoke at length of the importance of identifying the right mentor. As one SME expressed "mentorship should be intentional and targeted." If an individual has a certain skillset, a protégé should target the individual to learn more. In addition to identifying the right mentor, the importance of the mindset of the protégé was mentioned by three SMEs. The

protégé has be able to listen, and willing to take construction criticism. The protégé also has to be willing to step outside of their comfort zone in conversations.

Three SMEs warned against a mentor relationship with a direct supervisor or direct report. According to these SMEs, the supervisor needs to be able to coach and discipline. As such, there needs to be some separation between the mentor and protégé within the chain of command. When this separation between a supervisory role and mentorship role becomes blurred the value gained from a mentorship relationship decreases.

Three other SMEs spoke of willingness and commitment. One of these anonymous SMEs expressed "Forcing someone to check a box when they don't have initiative is a waste of time for both parties." The protégé has to make a concerted effort to identify a mentor, and then invest in making that relationship grow. If a bad mentor is chosen then little value is placed in the mentor relationship, wasting both parties time.

One SME expressed frustration with a past experience where the mentor relationship was vague and lacked definition. This lack of clarity of expectations left the SME exasperated and feeling undervalued.

Education/training. All eight SMEs who answered the manager question set discussed higher education and advancement. The results of those eight responses vary and are as follows.

One SME concisely stated there is a big leap between nothing and a bachelor's degree with incremental value between degree levels, such as an associate degree to bachelor's degree, or bachelor's degree to master's degree. This perception was shared by all eight SMEs as they discussed the professional necessity of higher education. While three of the eight SMEs were in agreement that, with substantial experience, a bachelor's degree is not necessary to reach middle management, they agreed a master's degree will soon be necessary for advancement into the executive echelon. An additional two SMEs mirrored this sentiment with comments that a degree is especially important if moving from a technical role to a managerial role as the additional education provides business acumen.

Four SMEs discussed the technical necessity of a specific degree due to the fact service and contracting companies such as engineering firms essentially sell the credentials of their

staff. While these SMEs were quick to say a degree does not make someone better than someone without a degree, they commented a degree looks promising on a resume, shows the knowledge is there, and is used as a tool to narrow the pool of potential job candidates.

All SMEs discussed in some fashion that the degree itself is not knowledge, but a sign of something greater. One SME stated higher education "is a commitment to want to take [a career] to the next level." Another SME spoke at length of the value college has for introverts. According to this SME college helps introverts break out of their comfort zone. In the opinion of that respondent, college is not about the knowledge gained in the classroom, college is about the fact an individual stood up in front of a class and handled questions, teams, and conflict. This experience makes an individual more polished in the professional realm.

There was no clear consensus among SMEs on whether education creates a more successful individual, or if individuals with an aptitude for success also complete higher education. One SME observed there is a correlation between advanced social skills and being very smart, learning from others, building the right support network, identifying mentors, and being in the right place at the right time. Another SME spoke of two types of educational individuals: those who are highly educated yet unprepared for life and those who are highly educated because it fits their personality. Through these observations SMEs supported the need for education in addition to real world experience. Education is one tool available to individuals on their journey to success, and other factors such as networking, personality, and experience are equally valuable.

Four of the SMEs discussed the effort and commitment needed to purse higher education while maintaining full time employment. Investing the amount of time and money required to achieve a degree requires taking the long view. The benefits are not instantaneous, and an individual needs to recognize the long term advantage of having a degree or additional degree. Sacrifices are necessary, both for the individual and the individual's family. The multi-year, long term commitment to a degree program requires a high level of constant motivation on the individual's part. In addition, an individual needs to be very aware of work-life-school balance as the risk of burning out affects all three aspects of an individual's life.

Education and training was mentioned as a desired program component with varying degrees of importance by all SMEs interviewed. At a minimum SMEs agreed that a multi-year development program should provide the opportunity for higher education, training, and certifications as needed for the participants long term goals. Examples of educational support included: ongoing credits to maintain of a current certification, boot camps, conferences, and college. As detailed in the personalized section, SMEs felt strongly that these educational opportunities need to be customized for each individual and not widely mandated. Two participant level SMEs expressed frustrations with trainings that they felt added no value while only checking a box. The quality and ability for timely application of the trainings are critical.

Role duration. SMEs were asked the ideal duration a participant should remain in a specific job function or role. While the answers varied from six months to four years in a role, the majority of SMEs responding to this question felt the between 18 months and 3 years was a reasonable period to stay in a role. However, three SMEs declined to provide a duration, stating it is all dependent on the individual. All responding SMEs spoke of the need for adequate time to become proficient in the role and level of management, and half spoke of needing time to identify and implement positive change. One SME recounted a story of being told if they stay in a management role for more than five years they are stale and no longer advancing. Another SME spoke of advice to stay in a position two to three years while advancing through lower and mid-level management, and no longer than five years once obtaining an upper management position.

Benefits. Eight SMEs responding to the managerial question set identified many potential benefits of a multi-year development program for high potential individuals.

All of the managerial SMEs spoke of the positive characteristics of the individuals who complete such a program would possess. Four SMEs spoke of the value of developing a well-rounded pool of potential leaders. Individuals who completed such a program would have a better understanding of the business and clear long term goals. These individuals would have increased in maturity and experience due to the development program, and in turn would act like leaders in ways they weren't before. Furthermore, a multi-year development program would create a pipeline of top performers. One managerial SME stated when everyone is an A

player, everyone advances. Three of the managerial SMEs spoke at length about having a pool of confident, competent, experienced people who are looking for a challenge and have a commitment to grow and excel. Three SMEs referred to the group of participants and graduates as a motivated and engaged group of employees with high moral, enthusiasm, and a vested interest in the company.

Four managerial SMEs spoke of increased retention. The program would provide high potential individuals with the knowledge they are being invested in and valued by the company. One of these SMEs stated they hoped such a program would instill "a touch of loyalty." Another SME spoke of the business benefits of building an organization and a business around high potential individuals. This SME indicated communication with those high potential individuals was critical in retaining them and developing them into leaders.

Three managerial SMEs spoke of the business improvements and business opportunity developed by high potential individuals completing a multi-year program. These participants would leave a series of improvements in their wake as they moved through different roles. In addition, these participants would gain a better understanding of the services all business groups and departments in a company offer, making them better salespersons. Having a pool of these well-rounded individuals would result in more client work due to clear communication of the capabilities and bandwidth of the contractor company.

Two managerial SMEs spoke candidly about the benefits a multi-year development program for high potential individuals would offer even if the participants left the company. There were two aspects of this view, one of business opportunity and one of altruism. From a business side, if individuals left, the meaningful relationships formed in the program would remain. In addition, these former participants would have a more thorough understanding of the full range of capabilities the contractor company possessed, which in turn would result in additional work for the contractor. In terms of altruism, one subject manager expert quoted the anonymous Greek proverb "Society grows great when old men plant trees whose shade they know they shall never sit in." This SME elaborated that every individual that is trained and developed within the industry is an investment in the future. Investment in the community and

younger professionals assures the SME would have promising individuals on whom to pass on the business and the world.

Barriers. Many barriers to implementing a successful multi-year development program in a contractor company in the Alaska Oil & Gas industry were identified by SMEs. Barriers identified are:

- Economics/Financing
- Dynamic Market
- Program Management
- Executive Commitment
- Participant Retention

Economics/financing. Ten of twelve SMEs cited finances as the biggest barrier to implementing a multi-year program. However, two SMEs stated there is a misconception that these types of programs are costly. Those two SMEs argued these programs are cost effective, but the business case needs built to prove cost benefits. Furthermore, as a multi-year program crosses multiple fiscal years, SMEs expressed concern of securing long term funding for such a program. Additionally, SMEs were concerned the program would risk cancellation in years with a poor economy.

As the targets of this program are contractor companies, one SME spoke of funding in terms of value to the client. Either a business case is made to the client, who then pays for program costs, or overhead rates on projects go up to account for the expenditures. In either case, the client would be footing the bill for this program, which may be an obstacle.

SMEs who have executed similar programs commented on the specific costs of organizing and running a program. In addition to the participant's time, there is also cost for expenses, vendors, and the program management. According to one SME a program with less than ten participants is simply not financially viable given the cost of the organizer's time.

Dynamic market. Among SMEs who see funding as a major barrier, multiple factors came into play. The first is the nature of contractor business and of the Alaska Oil & Gas industry. Fossil fuels are a commodity, and as such the business is cyclical. Contractor work is

production driven, which restricts the ability to invest the time of high performing individuals in overhead work.

When the Oil & Gas market is performing well, contractors have a plethora of projects, which means opportunities for high potential individuals. When the market is down opportunities become limited. In down economies the client squeezes, and in turn the contractor companies have to reduce costs. One SME expressed concern that in times of hardship the decision to keep a high potential trainee while letting a manager go would be hard to justify. Due to the long term nature of a multi-year program many up and down cycles could be encountered, and SMEs were not sure how the program or the participants would survive the low times.

Program management. Appropriate and consistent management was listed as a potential downfall of a multi-year program by five SMEs. Experienced people in the organization with expertise running similar programs would need to be engaged. The quality of the program would need careful management, and potentially outsourced if a contractor company does not have the appropriate skill set in house. Mid-level managers, including the participant's direct supervisor, would need educated on the program and kept up to date regarding the participant goals. A program manager would need the time to both kick off the program and then provide ongoing support for years. SMEs who have been involved in execution of similar programs spoke at length of the emotional energy required to successfully manage a development program. The multi-year nature of this program could present a challenge in keeping moral high.

Executive commitment. Four SMEs familiar with development programs expressed concerns regarding executive commitment. For a program to be successful support is needed for more than one fiscal year. This can be difficult due to executive turnover. A successor may not see the same value, or be willing to sponsor the same programs as the previous administration.

Executives have varying expectations of a program, and varying levels of desired involvement. According to one SME many executives want a robust vetting process and the program to be widely accepted prior to implementation. This takes time, and often times

involves executives with very little or no involvement in the program. Once an executive committee is established, the committee needs to remain involved.

The need for ongoing executive support overlaps with program management issues mentioned before. Both issues call for a robust communication plan implemented to keep executives, managers, and participants aware of the program status. The program manager would need to keep executives from losing interest in the program as it ages. According to one SME familiar with development programs there is an inclination to throw out programs that are perceived to be stagnant and start over. The program manager would need to harness the executive's excitement, and then keep them engaged.

Participant retention. Five SMEs identified retention as a barrier to success of a multi-year program. Individuals in the program would be recruited by competitors. To counter this risk, the program and opportunities provided to the high potential individual need to be top notch. Even with a stellar program there would still be some level of turnover of the participants. This is the nature of the contractor industry; clients headhunt top performers among contractors.

If participants do not adequately understand the time and necessary sacrifices required for success in the program they may drop out. It is critical potential participants are made fully aware of time requirements, commitments, and travel required prior to beginning a multi-year program. One SME spoke of a similar program which strongly suggested conversations with family prior to participating.

One SME suggested that if the program is not communicated clearly and expectations set from the onset participants could develop false expectations and take on a sense of false entitlement. This could result in decreased retention and high dropout rates.

Recommended Framework

Based on the data gathered in the interviews and the literature review, a framework for a multi-year development program targeting high potential individuals has been developed. At a minimum the participant would have engaged in three separate roles, completed formalized education, continuously pursued skill building opportunities, and been consistently mentored by both senior and technical mentors. This framework, located in Appendix G, has taken into

account the business structure and culture of contractor companies in the Alaska Oil & Gas industry. Barriers identified played a substantial part in creating this framework. The following sections detail each portion of the framework.

Key Players

Based on the literature reviews and interview responses, five key roles have been identified in the framework:

- Participant: An individual identified as high potential with the ambition and drive required to make the time and lifestyle sacrifices necessary participate in this time consuming program.
- Development Program Manager: The executor of the program. Responsible for communicating program status, coordinating the program execution, and providing ongoing support to the participant.
- Senior Mentor: A high ranking individual outside of the participant's chain of command. This can be a single individual throughout the participant's journey through the program, or change as the situation dictates.
- Technical Mentor: A senior individual knowledgeable in all aspects of the participant's current role. The individual filling this role will change as the participant changes roles.
- Supervisor: The direct supervisor of the participant and is able to provide direct feedback as to the participants current competencies.

Key Categories

The key categories for the program have been determined to reflect the primary components of a program as identified by interviewees. These components fall into four key categories:

- Administrative
- Role/Position
- Mentorship
- Education

Administrative Category. The intent of the administrative portion of the program is to coordinate between key players while establishing expectations and maintaining accountability.

Upon kickoff of the program the participant would complete a leadership assessment, such as the 360-degree Leadership Assessment by the Center for Creative Leadership. This assessment will provide the basis for skill development and educational choices. Based upon assessment results and participant goals the program manager would coordinate the participant with a senior mentor, as described below in the mentorship category.

With input from the program manager and senior mentor the participant would draft a detailed development plan. This development plan would include a roadmap of the experiences necessary to reach the participants long term goals. In addition, the development plan will identify technical, business, and soft skill areas for improvement with the associated tasks specified to address these weaknesses. This development plan would be endorsed by the senior mentor and approved by the program manager.

Program documentation. A key concern of many SMEs is accountability within the program. Based on input from SMEs and existing programs, a logbook would be maintained by the participant to adequately track participant progress against the participant's goals. The first portion of this logbook would be the participant's detailed development plan including short and long term goals. The second portion of the logbook will consist of activities with indicators for both applicable key category and goal. Mentorship meetings with summaries, networking opportunities, education, and measurable on the job tasks should all be recorded in this log. This log would be reviewed quarterly with the program manager to ensure the participant is actively participating in the program and on track for program completion.

Program completion. Completion of the program would be determined by the program manager. The participant would provide the program manager with a logbook documenting activities supporting the individual's accomplishments in the program. The participant would also submit a summary of learning moments and value gained while participating in the program. The program manager would utilized the participants log book and written learning summary to determine if all program requirements have been fulfilled.

Role category. Over the course of the program participants would rotate through three roles. The goal of this rotation would be to maximize on the job learning while increasing exposure to multiple business functions and project types within the Alaska Oil & Gas industry. To ensure adequate time to learn a role and add value to the position an assignment should last a minimum of 18 months. Determination of the timing to move onto a new role would be based on a combination of participant's achievement within the current posting, intercompany opportunity, and participant's goals. Identification of available opportunities would be coordinated by the program manager with the involvement of the senior mentor and the participant's supervisor. Further specification regarding the position identification process would be tailored by the program manager assigned by an implementing the company.

For each role the participant would clearly identify goals and learning objectives. These objectives would fit into the participant's individual development plan. Activities and accomplishments within the role would be clearly documented in the participant's logbook and explicitly tied to the learning objectives of the assignment. Achievement of the objectives set forth for the assignment would indicate the participant is ready to move to the next role.

Mentorship category. The participant is required to have two formal mentors, a senior mentor and a technical mentor. The program manager would assist with identification of mentors and is responsible for the education of those mentors regarding program requirements, expectations, and commitments. Based on SME interview responses and the literature review mentorship would provide participants with exposure to a diverse range of individuals. In a work environment encompassing four different generations' mentorship relationships would allow the participant to better understand their peers while developing communication skills.

Senior mentor. Once the participant has completed the leadership assessment the participant and program manager would review the participant's strengths, weaknesses, and goals. Based on this review, the program manager would assist in identifying a senior mentor with experience in the participant's desired career path. The senior mentor should not be in the participant's current chain of command, or should be high enough in the chain of command to avoid direct influence over the participant's current role. Once identified the senior mentor

would provide input into the participant's development plan, including guidance on needed education and experience.

Each month the participant would arrange a mentorship meeting; a reoccurring calendar meeting is suggested. If possible this meeting should occur in person, however given the geographical challenges of Alaska, the program acknowledges this is not always possible. Prior to the meeting, the participant would provide the mentor with the desired conversation topics and questions. Topics for discussion would include development plan updates and roadblocks, along with additional ways for the participant to gain experience.

Technical mentor. At the onset of the program and with each new role, with assistance from the participant's supervisor, program manager, and senior mentor, the participant would identify a technical mentor. The technical mentor should have strengths in a specific area tied to the participant's objectives for the role. The technical mentor should be available to guide the participant as the participant advances through a role. The purpose of this technical mentor is to provide a safety net, enabling the participant to accept tough assignments and risk failure without compromising the task, project, or company. The technical mentor would assist the participant in identifying methods of achieving position objectives. The participant would be responsible for arranging semi-monthly mentor meetings with the technical mentor, with topics and questions provided prior to meeting. Topics for discussion should include short term goals, current struggles, and technical knowledge sharing.

Education category. Based on responses from SMEs, the type of education needed for an individual is greatly varied. Education would be approached as a combination of two aspects – formalized education and informal skill building opportunities. SMEs were in alignment that lack of a bachelor's degree can hamper advancement beyond middle management. As such, if a participant has not achieved a bachelor's degree this would be a core aspect of the program. Based on goals the participant would work with the program manager and senior mentor to determine the best degree for the individual participant.

While managerial SMEs did not find a master's degree critical to their success, it was suggested the master's degree is becoming more important and demonstrates a desirable level of commitment to achievement, improvement, and excellence. As such, if a participant has a

bachelor's degree and does not have a master's degree, the participant would pursue an applicable master's degree.

For participants who have previously achieved a master's degree the participant will have the option to pursue an additional degree at the master's or doctorate level, or arrange a set of courses offering education in areas applicable to the participant's goals. The goal of this set of courses is to improve the participant's business acumen and address weaknesses as determined by the 360 Leadership Assessment. Additional formal education can consist of university provided courses, privately offered boot camps, or internally provided trainings.

With the assistance of the technical mentor, each participant would identify technical trainings applicable to short term goals and current position. This identification effort should include achievable certifications which would build the participants technical resume.

Once the leadership assessment growth areas for the participant have been identified, and some of these areas can be improved upon outside of the job or formal education systems. The intent of the informal education portion would be to provide the participant with the means to develop skills communicating with a diverse range of individuals in a variety of situations. Skill building opportunities could consist of a variety of individual specific activities, including leadership roles in the community, company diversity groups, or professional organizations.

Final Conclusions

Impact of the Research

While many hurdles exist for implementation of a multi-year development program in Alaska Oil & Gas contractor companies, the literature reviews and interview responses support the need of a program. The framework developed incorporates the key components identified by local Alaskan SMEs, and is structured to support the desired benefits while acknowledging existing barriers. This framework provides a backbone for customization by any contractor company in the Alaska Oil & Gas industry. With long term executive commitment, an experienced and energetic program manager, and clear communication, a multi-year development program targeting high potential individual utilizing this framework would increase retention of participants. Upon completion of a program based on this framework,

participants would provide companies with a set of well-rounded leaders with a thorough understanding of the company's business goals and culture.

Further Research

Topics for further research were identified by SMEs and the project manager throughout the course of this project. Exploring these ideas would build upon existing knowledge specific to the Alaskan contractor companies. Further research opportunities would support implementation of the recommended framework as well as provided long term measurements of results.

Prior to implementation. Any contractor company considering implementation of this framework must develop a custom business case unique to their services and products. Two SMEs firmly believed a development program could be cost effective. With this in mind, research quantifying the business case would provide value to the implementation effort.

Research conducted to develop the recommended framework for a multi-year development program targeting high potential individuals highlighted a lack of process on identifying those high potential individuals. One SME suggested a personality test, another supported evidence of extraordinary, or "herculean" prior accomplishments, and yet another advocated for an open door policy. Further research into specific methods of identifying high potential individuals in Alaskan contractor companies is required to ensure a strong class of participants. Depending on the goals of specific contractor companies, the definition of high potential could vary.

After implementation. Once this framework has been implemented at a company, research potential exists for determining the success of the program. This could include analysis of the retention rate and attained promotions of program graduates compared to non-participants of similar demographics.

References

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STAKEHOLDER REGISTER

Project Title: A FRAMEWORK FOR A MULTI-YEAR DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL & GAS INDUSTRY

Date Prepared: November 19, 2015

Stakeholder Information					Classifications		
ID	Name	Position	Role	Contact Information	Influence	Interest	Internal/External
1	Josie Wilson	CH2M HILL Oil, Gas & Chemicals Training & Leadership Development Manager	Project Sponsor	Josie.Wilson@ch2m.com	High	High	Internal
2	Roger Hull	UAA Faculty	Project Advisor	RKHull@uaa.alaksa.edu	High	High	Internal
3	LuAnn Piccard	UAA Faculty	Committee Member	LPiccard@uaa.alaska.edu	High	High	Internal
4	Meuy Saechao	UAA MSPM Admin	UAA Requirements Assistance	MSaechao2@uaa.alaska.edu	Medium	Medium	Internal
5	Stephanie Loomis	Educational Mentor & Writing Reviewer	Document Review	sloomis05@hotmail.com	Low	High	Internal
6	Scott Loomis	Program Manager & Business Development	Document Review	Scottloo05@hotmail.com	Low	High	Internal
7	Alena Robson	Student Advisor	Student Advisor	AlenaRobson@gmail.com	Low	Medium	Internal
8	Manager Interviewees	Various	Source	Various	Low	Low	External
9	Participant Interviewees	Various	Source	Various	Low	Medium	External
10	Executor Interviewees	Various	Source	Various	Low	Low	External

Appendix B: IRB Proposal & Approval Documents

UAA UNIVERSITY of ALASKA ANCHORAGE

INSTITUTIONAL REVIEW BOARD
PROPOSAL FORM

Do not change the text in the shaded areas of the form. Your responses to each question/section should be written where it says <<Overwrite Here>>; please keep your response in the same blue 10 pt Arial font.

1. APPLICATION INFORMATION

Title of Proposal	A FRAMEWORK FOR A MULTI-YEAR DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL & GAS INDUSTRY
Principal Investigator(s) and Degree(s)	Ryan Loomis; Bachelors of Science
Principal Investigator(s) UAA Department	Engineering, Science, and Project Management Department
PI(s) UAA phone number	NA
PI(s) Home or cell phone number	(425) 344-9684
Other Project Personnel and Contact Information	NA

Date Submitted	3/27/15
Proposed Start Date	5/1/15
Anticipated Completion Date	12/1/15

Indicate which review category for our application by placing an "X" in the first column on the left. See the IRBNet Library for the IRB Review Categories document. Note that the final determination of review category is made by the IRB Chair.

	Review Requested	Explanation (if needed)
X	Exempt	PM686 Capstone Project
	Expedited	<<Overwrite Here>>
	Full Review	<<Overwrite Here>>

X	Place an "X" in the left column to indicate that you have included Certificates of IRB Training for all PIs and Researchers. Please attach the certificates separately.

PRINCIPAL INVESTIGATOR ASSURANCE STATEMENT

By submitting this protocol application and signing the IRBNet package electronically, I certify that the information provided is true and complete. I agree to and will comply with the following statements:

1. I will abide by all regulations, policies and procedures applicable to research involving human subjects.
2. I will accept responsibility for the scientific and ethical conduct of this research.
3. I will accept responsibility for providing personnel (collaborators, staff, graduate students, undergraduate students, and volunteers) with the appropriate training and mentoring to conduct their duties as part of this research.
4. If this IRB Protocol Application is for student research, I certify that the student's graduate advisory committee has reviewed and approved this research protocol.

5. I will obtain approval from the IRB prior to amending or altering the research protocol, consent/assent forms or initiating further correspondence with the research subjects.
6. I will report immediately to the Office of Research Compliance (907-786-1099) any complaints from participants or others, any adverse events associated with research participation, and/or any unanticipated problems or issues related to this study.
7. I will report the death or life threatening event of a participant that is possibly, probably or definitely associated with study procedures to the IRB immediately by submitting an IRB Adverse Event Report on IRBNet.
8. I will comply in a timely manner with requests of the IRB regarding Continuing/Final Review.

I realize that failure to comply with the above provisions may result in suspension or termination of this project by the IRB and, if appropriate, restricted access to funding and notification of sponsor, and referral to the appropriate UAA administrative official(s) for disciplinary action.

2. FUNDING INFORMATION

Funding Type	Brief Description
Have you applied for external funding?	No If yes, include a copy of the funding proposal in the IRBNet package.
If yes, list the Agency	NA
Proposal Number	NA
Have you applied for internal funding?	No If yes, include a copy of the funding proposal in the IRBNet package.

3. PROJECT CLASSIFICATION

Type of Project	Brief Description
Faculty Research	NA
Doctoral or Master's Student – Thesis Research*	Master of Science in Project Management Capstone Project Primary Advisor: Roger Hull, UAA College of Engineering, Project Management, 907-786-1923, rkhull@uaa.alaska.edu
Doctoral or Master's Student – Other Research*	NA
Undergraduate Student – Thesis Research*	NA
Undergraduate Student – Other Research*	NA
Other	NA

* In the brief description, provide the Research Supervisor's name, UAA department, and contact information.

4. OTHER HUMAN SUBJECT REVIEW INFORMATION

Information	Response (if applicable)
Is this proposal being reviewed by another ethics committee?	No
Name of Committee	N/A
Institution	N/A

Contact Person	N/A
Email Address	N/A
Phone Number	N/A

Place an "X" in the first column to indicate the status of review of this project by another ethics committee.

	Review Status	Explanation (if required)
	Application has not been submitted.	N/A
	Application is currently under review.	N/A
	Application has been approved.	N/A Please include a copy of the approval document in the IRBNet package.
	Other	N/A

5. ABSTRACT

Explain the research project in **lay language** that can be easily understood by someone who is not an expert in your field. The abstract must include: 1) A brief summary of the research question; and 2) a brief description of the procedure.
Maximum 150 words.

The Alaska Oil & Gas industry has a limited labor pool which creates a high demand for talented individuals. Furthermore, individuals who exhibit potential for leadership are difficult to retain. Individuals with experience in all aspects of arctic oil & gas construction, from engineering through operations, are in the highest demand. Despite this, some of largest employers in Alaska do not have solidified long term programs for developing talent in these areas. There is considerable need for the companies in Alaska's Oil and Gas Industry to develop and implement a plan which will ultimately result in the retention of talented, skilled employees. This project will produce a framework which can be utilized by companies to implement competitive multi-year development programs specific to the unique Alaska Oil & Gas industry. Key aspects of the framework are job movement, mentorship best practices, and applicable higher education.

6. BRIEF RATIONALE AND OBJECTIVES

Maximum 500 words for all three responses.

Required Information	
Rationale for study grounded in peer reviewed literature in your discipline:	
N/A	
State your research question and hypotheses	What are the components necessary for a successful multi-year development program framework focused on addressing retention of high potential individuals in the Alaska Oil & Gas industry? A successful framework will focus on multiple job assignments over 4 years while touching on mentorship best practices and applicable higher education.

Explain your research design/approach (e.g., quantitative, qualitative, experimental, survey, focus group, etc.). If applicable, respond to the following questions: a) How many groups are you collecting data from? b) Is there random assignment to the groups? c) Is there an experimental manipulation? If yes, explain why. A description of the stimulus or the manipulation can be explained in the summary of procedures.	I will be conducting interviews and reviewing confidential company data. Once I understand how managers and individuals view development in Alaska I will be able to build a framework to fit. The company providing confidential statistics will remain anonymous. In order to gain the positive interview responses I am expecting to collect the amount of data needed to complete the manual, a phone, Skype or in-person interview will be necessary. Interview data will be collected from 3 groups: 1. Managers & leadership of Contractors involved in construction, engineering, and operation activates on the North Slope of Alaska. 2. Individuals with aspirations of becoming either subject matter experts or top leadership in the Alaska Oil and Gas Industry. 3. Individuals associated with similar programs. The sources were compiled in two ways. First I looked at who could directly use this framework. This includes human resources individuals and driven individuals at the beginning of their careers. Second, I will look for leadership in companies that could benefit from the manual. This includes executive management of multiple Oil & Gas Construction, Engineering, and Operations companies in Alaska. Random assignment to the groups was not used. Experimental manipulation will not be used for this project.

7. RESEARCH METHODOLOGY

DETAILED DESCRIPTION OF PROCEDURES

Required Information
Provide a brief summary of procedures in **lay language** (no more than 500 words):
Research Methods 1. An online search will be conducted to build proper interview questions and build a basis for the interviews. Templates will be researched for use during the interviews. 2. Confidential retention data from an Alaskan Oil & Gas company will be gathered. A confidentiality agreement will be signed prior to review of any data. All company information will be kept anonymous. 3. Identifying Interviewees: Individuals will be identified utilizing industry professional organizations. An email requesting participation will be sent to organization leadership for distribution to their members. In addition, specific management in target Alaskan Oil & Gas Contracting companies will be sent an email requesting participation. The initial email will contain project information and communicate that participation is strictly voluntary. 4. Interviews- Once an email of interest is obtained from potential interviewees a follow-up email will be sent. Included in this email will be a consent. No interview will commence without a signed consent form. The consent form is attached. At the start of every interview, regardless of the interviewee, the protocol form will be read aloud. The protocol form is attached. Interviews will aim to understand: • Components of a successful multi-year development program with the intention to increase retention and advance individuals. **Data Analysis** The data will be analyzed in two ways:

1. A histogram that shows the trending retention information between the anonymous company and publicly available industry statistics. Intent it to compare a target company against the overall industry. 2. Key discussion areas from interviews will be graphically depicted as well. This will also be depicted using a histogram. After both histograms are complete the results will verify if a multi-year development program could have a noticeable effect on retention, and what components of a program are most useful.	
Description of the location where the research will be conducted	Phone interviews will be conducted. In person interviews will be conducted at UAA. If not a UAA location, authorization allowing this research to be conducted at that location must be included in your IRBNet package.

RESEARCH METHODS AND TOOLS

Check all that apply with an "X". Include in your IRBNet package all questionnaire(s), interview guides, and focus group questions.

	Data Collection Methods or Instruments
	Questionnaires
X	Interviews
	Observations
	Focus Groups
X	Archival Data/Records Review: If your project utilizes academic, medical, or other records, please describe the data, provide documentation of official permission allowing you access to the data in your IRBNet package.
	Apparatus/Measuring Equipment or Device

Archival Data/Records Review	Response (if applicable)
If you are utilizing archival or existing data, indicate the dates the data were collected. These data must exist at the time of your IRBNet submission.	Existing retention data from an Alaskan Oil & Gas company will be reviewed. The company will remain anonymous. If the data are from a survey or questionnaire, provide a copy of the original instrument and a copy of the consent form in your IRBNet package. If the data records are from an experiment, provide a detailed description of the manipulation and measures and a copy of the consent form.
If the data are records based (e.g., medical records, legal documents), provide a list of the variables being extracted from the data.	Rate of retention.
If consent form is not available or if consent was not needed for the original	The consent form is not currently available. The request to review data has been submitted to the company legal

data collection, please provide a brief explanation.	department. A confidentiality agreement will be signed prior to review of any company data. If company legal does not approve the request, company information will not be reviewed.

8. SUBJECT SELECTION AND RECRUITMENT:

Required Information	Response
a. Maximum number of research participants and a brief rationale for that number	Maximum number of participants will be 15. This amount of participants will ensure a large enough data group to be collected from all parties in order to complete research.
b. Description of participants, rationale for their participation, and inclusion criteria. (Indicate age range, gender, cultural background or if specific populations will be chosen, e.g., prisoners, pregnant women, Alaska Natives)	All participants will either currently work or have worked in the Alaska Oil & Gas industry. These groups will be invited to participate due to their nature of work and experiences that will aid in this specific research project. All participants will be at least 18 years old. No specific gender or cultural background will be specifically included or excluded.
c. Description of groups or types of individuals that you are intentionally excluding, rationale for exclusion, and exclusion criteria	Those groups with no affiliation to the Alaska Oil & Gas industry will be excluded. These groups shall be excluded due to their lack of relevant experience.
d. Description of recruitment process and recruitment materials	N/A Please submit a copy of recruitment materials and messages in your IRBNet package.
e. Explanation of how recruitment is not burdensome or coercive to participants	Participation will be voluntary.
f. Description of plans (if any) to encourage the recruitment of minorities and women	N/A

9. BENEFITS, INCENTIVES AND COMPENSATION, COSTS, AND RISKS

Note: Consent forms should reflect any risks or compensation described below.

Question	Response
a. Describe potential benefits (e.g., therapeutic or unique self knowledge) that individuals may receive from participating in this research	There will be no individual benefits to participating in this study, but the Alaska Oil & Gas industry will benefit from the completed research. After a better understanding of retention and development in this industry, a cost savings associated with lower turnover may be the result.
b. Describe what new information may be learned from this research	New components and a formalized timeline for developing high potential human resources in the Alaska Oil & Gas industry.
c. Describe incentives to encourage individuals to participate in this research (including monetary or other compensation, thank you gifts, course or other academic credit, lotteries, etc.)	There will be no compensation given for participation

d. Describe costs (time, monetary or other) for participants in this research	Only 1 hour and 15 minutes will be taken of each participant's time. There will be no costs associated with participation. The interviews will last no longer than one (1) hour and any pre-interview documentation will take no longer than a combined time of 15 minutes.
e. Describe potential harms or discomforts (physical, psychological, social) for participants in this research	There may be some minimal risk or discomfort from participation in this research because I will be asking about past employment experiences, both the positive ones and the negative ones. These risks are being minimized by keeping all information confidential and specific names extracted. Because I will be conducting some of the interviews by phone, there is the risk of a confidentiality breech. I will be conducting the phone interviews in the privacy of my home and not at a public facility. In person interviews will happen at a UAA facility. The conversations will not be recorded. If a participant feels uncomfortable at any time, he/she may choose to skip a question or stop the interview.
f. Describe what you will do to minimize potential harms or discomforts to participants in this research	In order to minimize risks, I will be conducting the interview in the privacy of my own home or at a UAA facility. Participants will be allowed to stop the interview process at any time and all documents will be destroyed. Only I, as the researcher will have access to any data collected.
g. Describe any potential harms to the culture or society that is the subject of this research	There are no potential harms to the culture or society that is the subject of this research.
h. Describe what you will do to minimize potential harms to the culture or society that is the subject of this research	N/A

10. Participant Consent / Assent

Unless a waiver is requested and granted, all participants should be fully informed about the research (purpose, benefits and potential harms from participation, procedures, duration of participation, and special accommodations for language or comprehension), informed consent shall be documented by a written and signed consent form and the participant shall be given a copy of the signed form. The recommended reading level for consent documents is the 8th grade. Guidelines and examples for consent/assent forms can be found at http://www.uaa.alaska.edu/research/ric/irb/documents.cfm. A copy of the consent documents must be included in the IRBNet package. Please submit these documents as a Word document or text file.

Consent	Description
Describe the process of obtaining consent to participate in this research	An initial email will be sent to all potential participants regarding the nature of the study and inviting them to respond if interested in participating. Those who express interest will be emailed a copy of the consent form to read. Participants will have it signed and emailed back to me prior to our interview date.
If the participants are minors, describe the process of obtaining assent to participate in this research	No minors will participate
Describe how you will communicate to potential participants that their	The verbiage is included in the consent form.

participation is voluntary and that they may withdraw from the research at any time without penalty	
Describe if there was any deception involved in the generation of archival data, or if there is any deception involved in the consent process prior to data collection	N/A

Place an "X" in the first column if you requesting special accommodations to consent for this research.

	Request for Special Consent Procedures	Justification
X	a. Elements of informed consent are presented orally and documented through a short written consent form; the process shall be documented by a witness	Included In your IRBNet package, provide a written summary of what is to be said to the potential participant and a short form written consent document
	b. Electronic acknowledgement of informed consent (e.g., SurveyMonkey)	N/A In your IRBNet package, include the language from the online survey which indicates acknowledgment of informed consent.
	c. Waiver of the requirement for documentation (written, audio or video) of informed consent	N/A
	d. Waiver of some or all of the elements of consent	N/A
	e. Approval of reading level greater than 8th grade in consent documents	N/A
	f. Approval for inclusion of participants whose primary language is not English	N/A
	g. Approval for inclusion of adults with diminished cognitive capacity	N/A

11. Data Storage and Retention

Required Information	Description
a. Describe how the data will be collected or recorded (e.g., *paper instruments, electronic records, field notes, audio/video recordings, notes, etc.)*	Field notes will be taken on my computer during the interview process
b. Describe who will have access to the data	Researcher- Ryan Loomis

c. Describe how you will maintain confidentiality of the data	Confidentiality will be maintained by securing all identifiable data in my locked and password protected computer.
d. Do you have a federal Certificate of Confidentiality for this research?	☐Yes ☒No
e. Describe your plans for retention of data, where it will be stored, how long it will be stored, who will be responsible for maintaining and securing it, how it will be destroyed and when it will be destroyed	Data will be stored on my computer for the duration of the project. After the completion of the project, the data will be stored for three calendar years. After which, it will be destroyed through the method of deleting off the computer and emptying the electronic trash can. The researcher, Ryan Loomis, will be responsible for maintaining the data and securing it.
f. Describe your plans for using the data you collect (e.g., published in journal or equivalent, non- published written report, presented at conference or equivalent, archive only)	The data will be analyzed into a histogram and used in a non-published written report. The findings will be presented to a university-approved committee and other stakeholders.
g. Describe your plans for sharing the data and results with the community or population from whom the data were collected	The summary findings will be presented to a university-approved committee for academic purposes. The framework produced from the analyzed data will be shared with any contractor who would like to receive a copy.
h. Describe how you will transfer, communicate and share data among research team members, including description of encryption or security protocols	Any data that is necessary to be shared among research team members will be post-analysis. This means all identifiable data will have been removed and only collective, analyzed data will be shared.
i. Describe where and how consent documents will be stored	Consent documents will be stored on the researcher's locked and password protected computer.

12. SPECIAL PARTICIPANTS AND DATA CONSIDERATIONS:

a. PRINCIPLES FOR THE CONDUCT OF RESEARCH IN THE ARCTIC

In the table below, explain how your research proposal is responsive to the NSF Principles for the Conduct of Research in the Arctic (if applicable – see http://www.nsf.gov/od/opp/arctic/conduct.jsp).

b. HIPAA

If your research project involves the use of restricted private health information, please view IPAA information at http://www.uaa.alaska.edu/research/ric/irb/Resources.cfm, and explain in the table below below how your proposal is responsive to these requirements.

c. REQUIRED REPORTING OF ABUSE OR NEGLECT OF CHILDREN AND/OR VULNERABLE ADULTS

If your research has the potential to uncover actual or suspected cases of abuse or neglect of children or vulnerable adults, please consult the appropriate Alaska statute (47.17 Child Protection) to determine requirements for reporting such information at http://www.legis.state.ak.us. Please indicate in the table below how you will explain those requirements for reporting to potential participants.

d. FERPA

Family Educational Rights and Privacy Act, FERPA, (Title 34, Part 99 of the CFR). The regulations provide that educational agencies and institutions that receive funding under a program administered by the U.S. Department of Education must provide students with access to their educational records, an opportunity to seek to have the records amended, and some control over the disclosure of information from the records. With several exceptions, schools must

have a student's consent prior to the disclosure of educational records. In the table below, explain how your research is responsive to FERPA provisions.

e. SPECIAL PROTECTIONS FOR VULNERABLE POPULATIONS.

When applicable, researchers must document that additional protections of subpart B (Additional Protections for Pregnant Women, Human Fetuses and Neonates Involved in Research), subpart C (Additional Protections Pertaining to Biomedical and Behavioral Research Involving Prisoners as Subjects), or subpart D (Additional Protections for Children Involved as Subjects in Research) of 45 CFR part 46 have been met.

Place an "X" in the first column to indicate all of the following that are applicable to this research

	To Consider	Response
	a. Principles for the Conduct of Research in the Arctic	N/A Please explain how your research proposal is responsive
	b. HIPAA	N/A
	c. Required reporting of abuse or neglect for children or vulnerable adults	N/A
	d. FERPA	N/A
	e. Special protections for vulnerable populations	N/A

IRB Approval Notice

IRBNet Board Action

From: **Sharilyn Mumaw** (no-reply@irbnet.org)
Sent: Mon 4/20/15 3:15 PM
To: LuAnn Piccard (lpiccard@uaa.alaska.edu); Roger Hull (rkhull@uaa.alaska.edu); Seong Dae Kim (sdkim2@uaa.alaska.edu); Ryan Loomis (ryan.loomis@hotmail.com)

Please note that University of Alaska Anchorage IRB has taken the following action on IRBNet:

Project Title: [738483-3] A FRAMEWORK FOR A MULTI-YEAR DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL & GAS INDUSTRY
Principal Investigator: Ryan Loomis, BScCM

Submission Type: Amendment/Modification
Date Submitted: April 9, 2015

Action: APPROVED
Effective Date: April 20, 2015
Review Type: Exempt Review

Should you have any questions you may contact Sharilyn Mumaw at simumaw@uaa.alaska.edu.

Thank you,
The IRBNet Support Team

www.irbnet.org

Appendix C: Survey Consent Form

A FRAMEWORK FOR A MULTI-YEAR DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL & GAS INDUSTRY

Consent Form

Principal Investigator
Ryan Loomis, MSPM student

Faculty Advisor
Roger Hull, PM faculty

Engineering, Science, and Project Management Department
University of Alaska Anchorage

Invitation to Participate in a Research Study:

I invite you to be part of a study about retention and development of high potential individuals in the Alaska Oil & Gas industry.

Description of Your Involvement:

If you agree to be part of the research study, I will conduct an interview with you. This will either be by phone or in person at your preference. I will ask you to answer questions about retention and career development of high potential individuals in the Alaska Oil & Gas industry. I will be asking you to describe personal experiences with development and retention in the Alaska Oil & Gas industry. I will also be asking your opinions on the factors necessary to retain and develop talent in this industry. The interview will take no longer than 1 hour.

Benefits of Participation:

Although you may not directly benefit from being in this study, others may benefit because I am aiming to increase understanding of how to retain individuals in the Alaska Oil & Gas industry. Considering the possible outcomes of this research, a better understanding of developing and retaining high potential individuals will be realized. This may result in a cost savings associated with lower turnover.

Risks and Discomforts of Participation:

There may be some minimal risk or discomfort from your participation in this research because I will be asking about past employment experiences, both the positive ones and the negative ones. These risks are being minimized by keeping all information confidential and specific names extracted. Because I will be conducting some of the interviews by phone, there is the risk of a confidentiality breech. I will be conducting the phone interviews in the privacy of my home and not at a public facility. In person interviews will happen at a UAA facility. The conversations will not be recorded. If you feel uncomfortable at any time, you may choose to skip a question or stop the interview.

Compensation for Participation:

There is no compensation for your participation in this research interview process.

Confidentiality:

In the event I decide to publish the results of this study, I will not include any information that would identify you. Your privacy will be protected, all names will be withheld, and all research records will be confidential. It is possible other people may need to see the information you give us as part of the study, such as organizations responsible for ensuring the research is conducted safely. These entities could include the University of Alaska, government offices or the study sponsor, Josie Wilson.

Storage and Future Use of Data:

I will store your data for three years after project completion. After this date, all data will be destroyed. As I compose my final deliverable, I would like to ask permission to quote you as I see necessary. This is strictly voluntary. If you consent to this, please see below and sign. If you do not consent to the use of your quote, your name and any other identifying information will remain

confidential and secured on my computer for the duration of the project. Only I will have access to your research files and data.

Voluntary Nature of the Study:

Participating in this study is completely voluntary. Even if you decide to participate now, you may change your mind and stop at any time. You may pass on any question and end the interview at any time. If you decide to withdraw before this study is completed, all recorded information will be shredded and discarded.

Contact Information for the Study Team

If you have any questions about this study, you may contact:
Principle Investigator: Ryan Loomis, (425) 344-9684, Ryan.Loomis@hotmail.com
Faculty Advisor: Roger Hull, 907-786-1923, rkhull@uaa.alaska.edu

Contact Information for Questions about Your Rights as a Research Participant

If you have questions about your rights as a research participant, or wish to obtain information, ask questions or discuss any concerns about this study with someone other than the researcher(s), please contact:

University of Alaska Anchorage
Office of Research Integrity and Compliance
Sharilyn Mumaw
Phone: (907) 786-1099
Email: uaa_ric@uaa.alaska.edu

Consent

By signing this document, you are agreeing to be in the study. I will give you a copy of this document for your records. I will keep one copy with the study records. Be sure that I have answered any questions you have about the study and that you understand what you are being asked to do. You may contact the researcher if you think of a question later.

I agree to participate in the study.

Print Name _____

Signature_____ Date _____

Optional:

Consent to be quoted by researcher in final deliverable
I agree to be quoted in the final deliverable. ☐Yes ☐No

Signature _____

Appendix D: Managerial Question Set

QUESTION SET – About You

1.1. What is your education level?

1.2. Tell me about your position in your company and the Alaska Oil & Gas industry.

Official Title:

1.3. How long have you been with your current employer, what is the longest you have ever stayed with any given employer?

1.4. What factors enticed you to stay with a company when other opportunities were presented?

1.5. What has made you leave companies in the past?

1.6. In your opinion, what is the single most important factor attributing to your success to date?

1.7. On a scale of 1-10, how important are formal development opportunities in retaining an individual?

Minimal 1 2 3 4 5 6 7 8 9 10 Highly Important

QUESTION SET – About Higher Education

3.1 Do you see a relationship between higher education and advancement?

3.2 Does your company currently support or encourage furthering higher education? If so, how?

3.3 Have you pursued higher education while an employee, or encouraged others to? Why? (reasons, obstacles, incentives, benefits)

3.4. How has your post-secondary education (or lack thereof) affected your career?

QUESTION SET – Development Programs

2.1. What development programs have you been involved in – either as a participant or in implementation? Tell me about it.

2.2. What other efforts are underway to retain your company's talent?

2.3. In your opinion, what are the most common roadblocks individuals experience in advancing their career?

2.5. What components should a multi-year development program include to offer the most benefit to participants and the company?

2.6. What is the optimal duration you feel a growing professional should remain in a single role? Why?

2.7. What results/benefits would you, and a leader, expect from a multi-year development program?

2.4. What barriers do you see to implementing a multi-year development program in the Alaska Oil & Gas industry?

2.8. Would you support or sponsor a multi-year development program? Why (why not)?

2.9. – possible places to explore if time allows: logistics (slope, town), business opportunity (EPC, etc)

QUESTION SET – About Mentorship

4.1 Do you feel mentorship programs are valuable toward career advancement?

4.2 Are you a mentor? Tell me about your experiences.

4.3 Do you have a mentor? Did your mentor influence a decision to stay or leave a company?

4.4 What approaches/methods have worked well in your mentorship experiences?

QUESTION SET – Closing Comments

5.1. Is there anything else you would like to add?

Appendix E: Existing Programs Question Set

QUESTION SET – About You

1.1. What is your education level?

1.2. Tell me about your position in your company and the Alaska Oil & Gas industry.

Official Title:

1.3. How long have you been with your current employer, what is the longest you have ever stayed with any given employer?

1.4. What factors enticed you to stay with a company when other opportunities were presented?

1.5. What has made you leave companies in the past?

1.6. In your opinion, what is the single most important factor attributing to your success to date?

1.7. On a scale of 1-10, how important are formal development opportunities in retaining an individual?

Minimal 1 2 3 4 5 6 7 8 9 10 Highly Important

QUESTION SET – Development Programs

2.1. What development programs have you been involved in kicking off? Tell me about it. (Components, duration, iterations, etc.)

2.2. What were the goals of this development program?

2.3. How does the program quantify success? (Metrics)

2.4. What was required to get buy in, both from management and participants?

2.5. How are participants identified/recruited?

2.6. In terms of execution and results, what went well?

2.7. In terms of execution and results, what issues has the program had to overcome?

2.8. How is the program documented? (Charters, guides, results, etc.)

2.9. Is there a mentorship component?

2.10. Is there anything about the program that kept you up a night?

2.11. In your opinion, what are the most common roadblocks individuals experience in advancing their career?

2.12. What components should a multi-year development program include to offer the most benefit to participants and the company?

2.13. What is the optimal duration you feel a growing professional should remain in a single role? Why?

2.14. What barriers do you see to implementing a multi-year development program in the Alaska Oil & Gas industry?

QUESTION SET – About Higher Education

3.1 Do you see a relationship between higher education and advancement?

3.2 Does your company currently support or encourage furthering higher education? If so, how?

3.3 Have you pursued higher education while an employee, or encouraged others to? Why? (reasons, obstacles, incentives, benefits)

3.4. How has your post-secondary education (or lack thereof) affected your career?

QUESTION SET – About Mentorship

4.1 Do you feel mentorship programs are valuable toward career advancement?

4.2 Are you a mentor? Tell me about your experiences.

4.3 Do you have a mentor? Did your mentor influence a decision to stay or leave a company?

4.4 What approaches/methods have worked well in your mentorship experiences?

QUESTION SET – Closing Comments

5.1. Is there anything else you would like to add?

Appendix F: High Potential Individuals Question Set

QUESTION SET – About You

1.1. What is your education level?

1.2. Tell me about your position in your company and the Alaska Oil & Gas industry.

1.3. What would make you consider leaving your current company? What has made you leave companies in the past?

1.4. Why have you chosen to stay with a company when other opportunities are presented?

1.5. Do you have an Individual Development Plan?

What have you done to build it? What resources did you use?

Who have you shared it with?

How are you executing on it?

1.6. Do you think your goals are attainable at your company, or in this industry?

1.7. On a scale of 1-10, how important is formal development opportunities in retaining an individual?

Minimal 1 2 3 4 5 6 7 8 9 10 Highly Important

QUESTION SET – About Development Programs

2.1. Tell me about your experience in development programs.

Why did you join?

What have your experiences consist of, and what benefits have you gained?

What would you like to see done differently?

Would you do one again?

2.2. Are there other efforts are underway to retain your company's talent?

2.3. What components should a multi-year development program include to offer the most benefit to participants and the company?

2.4. What would you hope to gain as an outcome of participating in a multi-year development program?

2.5. What barriers do you see to implementing a multi-year development program in the Alaska Oil & Gas industry?

QUESTION SET – About Higher Education

3.1. Does your company currently support or encourage furthering higher education?

3.2. Have you pursued higher education while an employee, if not what where the reasons or obstacles, if yes, what was the reason or incentive?

3.3. Do you see a relationship between higher education and advancement?

QUESTION SET – About Mentorship

4.1. Do you have a mentor? Tell me about the experience.

4.2. How has having a mentor helped you advance?

4.3 What has worked well in maintaining a positive relationship with your mentor?

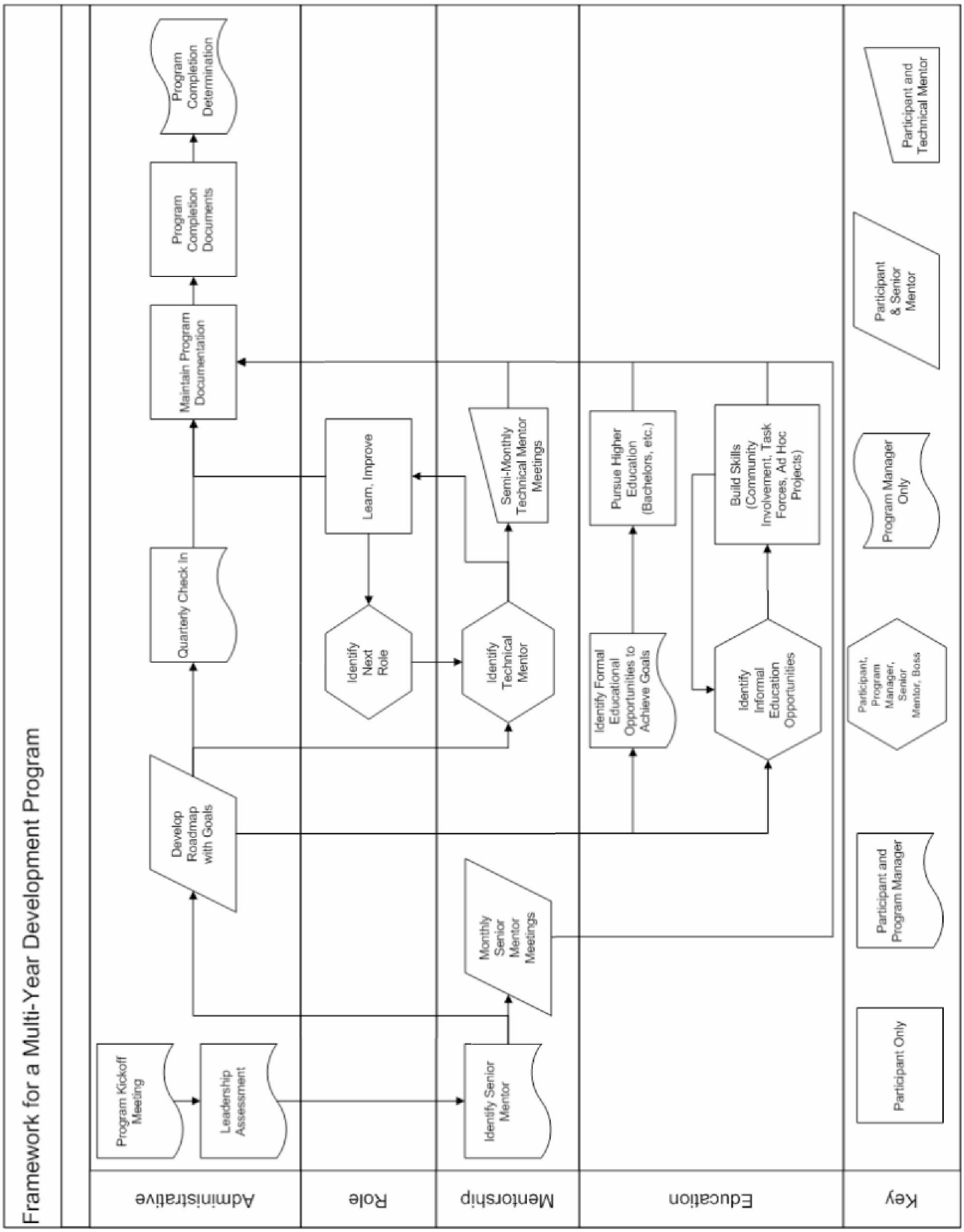
QUESTION SET – Closing Comments

5.1. In your opinion, what are the most common roadblocks individuals experience in advancing in Alaska O&G?

5.2. In your opinion, what is the single most important factor attributing to your success to date?

5.3. Is there anything else you would like to add?

Appendix G: Recommended Framework



A Framework For a Multi-Year Development Program Targeting High Potential Individuals in the Alaska Oil & Gas Industry

Project Manager – Ryan Loomis

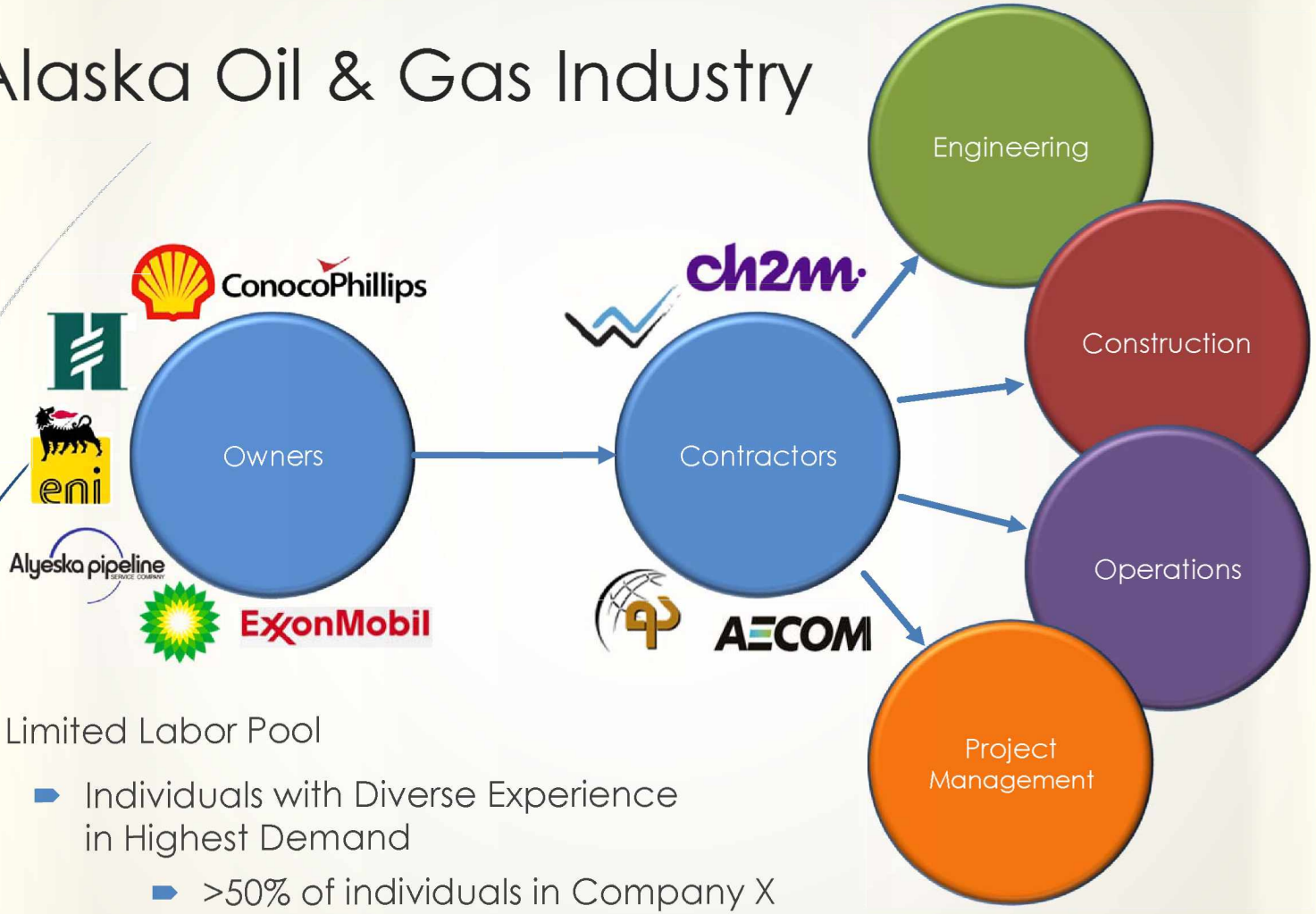
UAA MSPM Capstone Project

December 1st, 2015

Agenda

- Project Background
- Project Overview
- Research Results
- Framework
- Lessons Learned

Alaska Oil & Gas Industry



- Limited Labor Pool
  - Individuals with Diverse Experience in Highest Demand
    - >50% of individuals in Company X have been there less than 5 years


How?

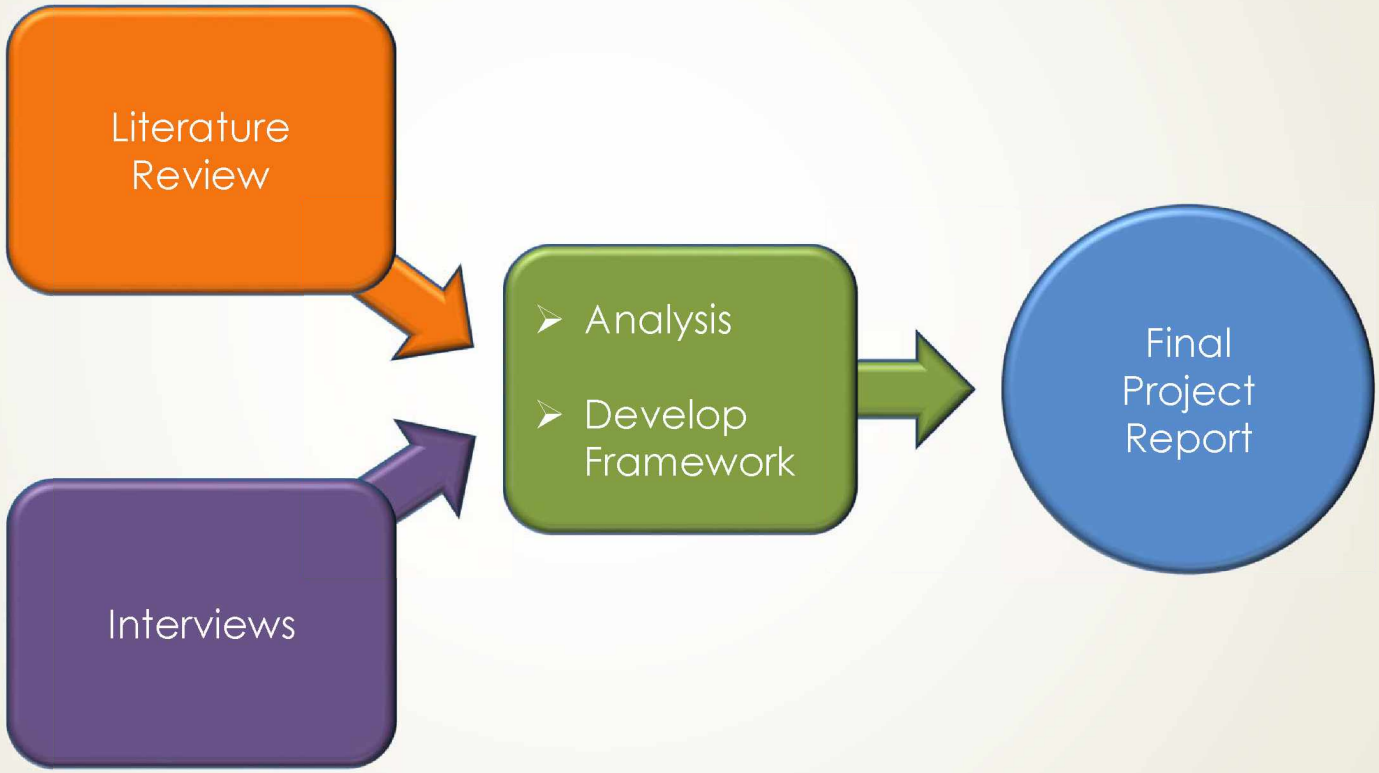
Multi-Year Development Program Targeting High Potential Individuals

- Increase Retention of High Potential Individuals
- More Knowledgeable Work Force
- Increase Cross-Business Collaboration

Project Deliverables

- Project Management Plan Documenting Project Planning and Execution
- Framework for a Multi-year Development Program Targeting High Potential Individuals
- Final Project Report Detailing Research Process and Results

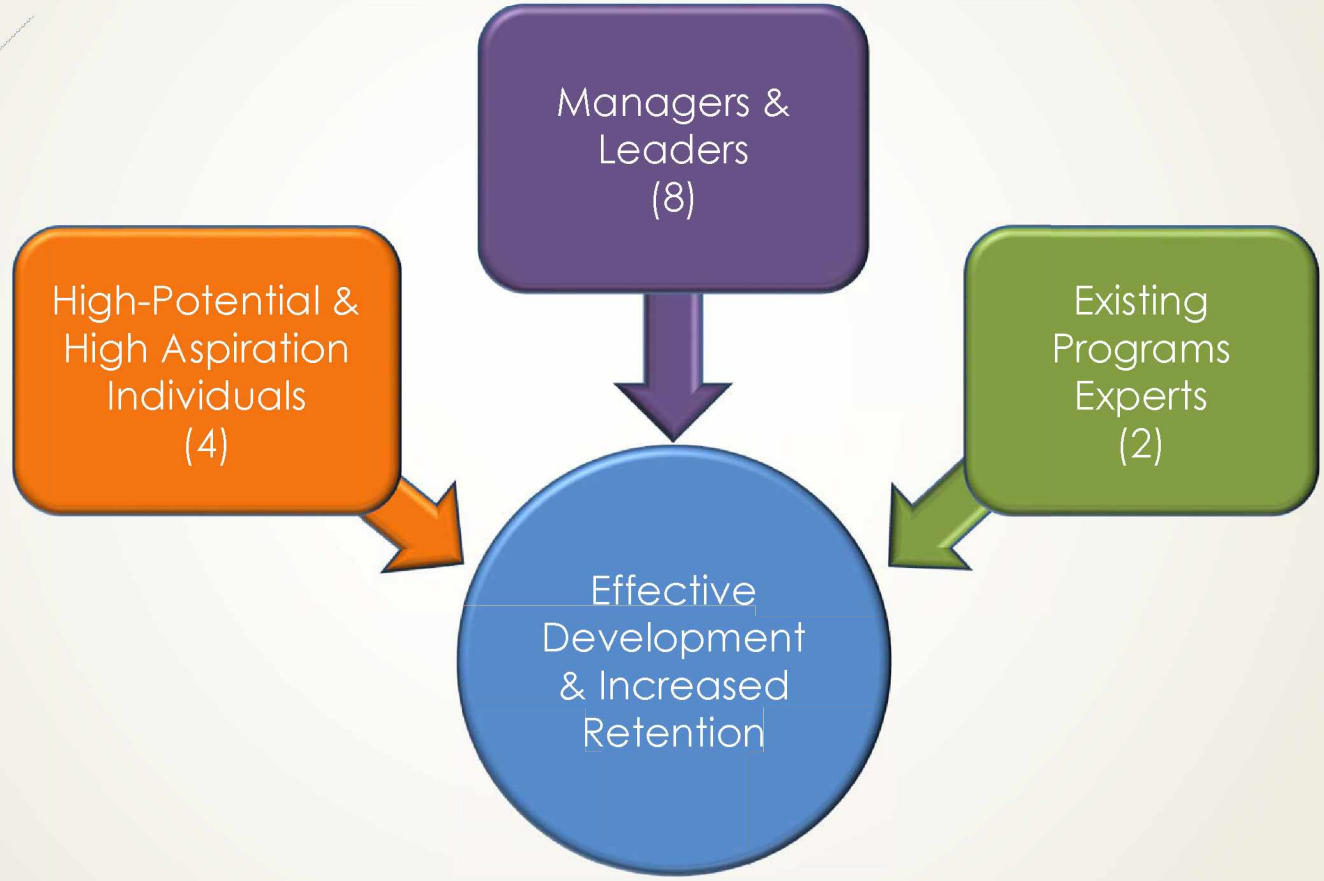
Research Approach



Literature Review

- Existing Programs
  - Multi-Year, Global Program (Production Company)
  - Short Term, Local Program (Contractor Companies)
- Generational Differences
- Importance of Career Paths
- Leadership Assessments

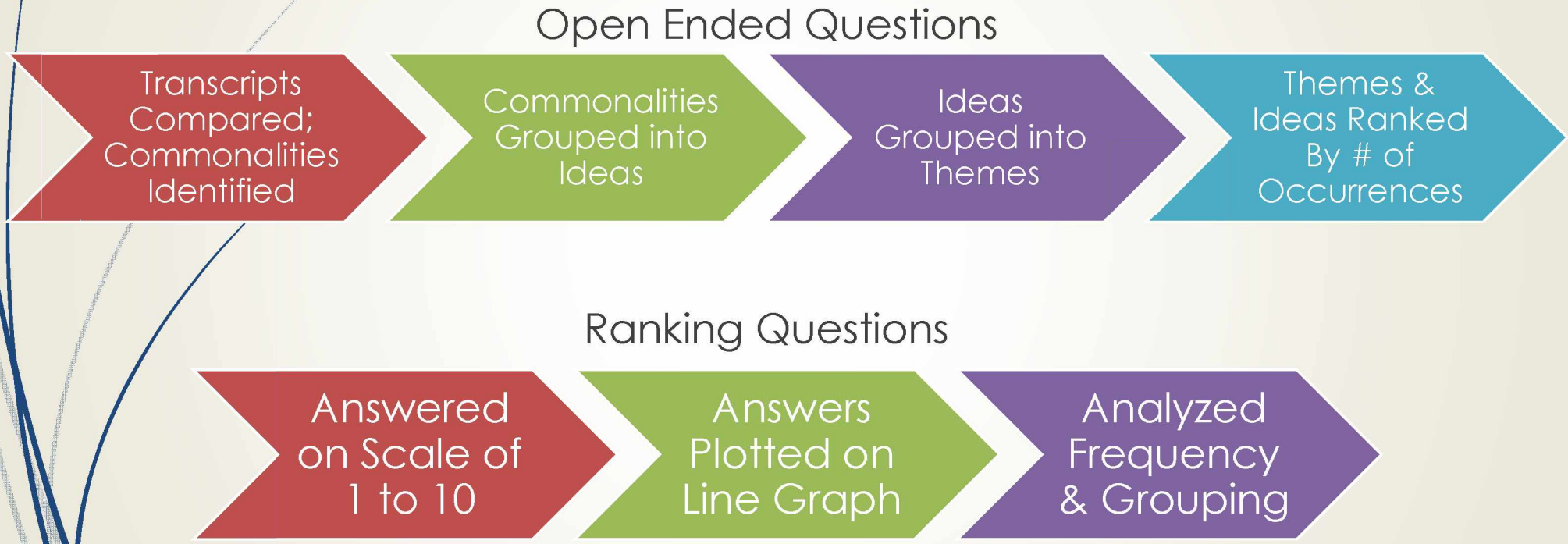
Interviews


Managers & Leaders (8)
High-Potential & High Aspiration Individuals (4)
Existing Programs Experts (2)
Effective Development & Increased Retention

Basis of Interviews

- Alaska O&G Industry Specifics
  - Retention
  - Career Growth & Success
  - Roadblocks for Advancement
  - Higher Education
  - Mentorship Best Practices
- Multi-Year Development Program
  - Components
  - Outcomes/Benefits
  - Barriers
  - Duration

Interview Data Analysis




Interview
Results

Factors Associated with Retention

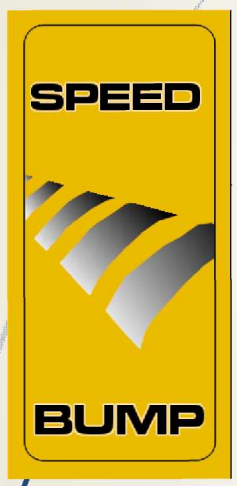
Factors enticing individuals to stay at a company

- Challenges & Opportunities (58%)
- Fair Compensation (58%)
- Personal Relationships (50%)
- Job Satisfaction (33%)

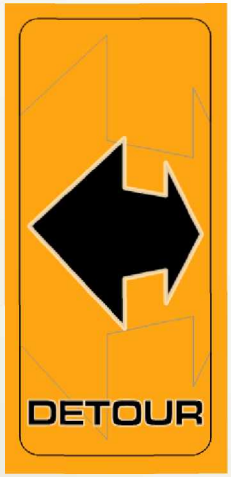
Factors leading individuals to leave a company

- Lack of Challenges (58%)
- Risk to Employment Status (33%)
- Changing Company Focus (Senior Managers)

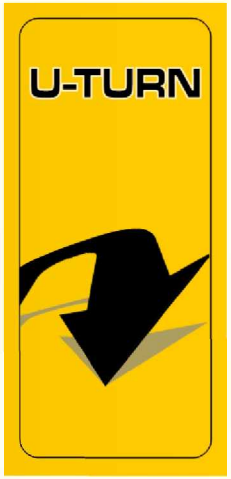
Roadblocks to Success in AK O&G Contractor Companies



- Good 'ol Boy Bureaucracy (58%)
- Limited/Small Market (50%)
  - Siloes of Operation
- Blockers & Pigeonholing (33%)

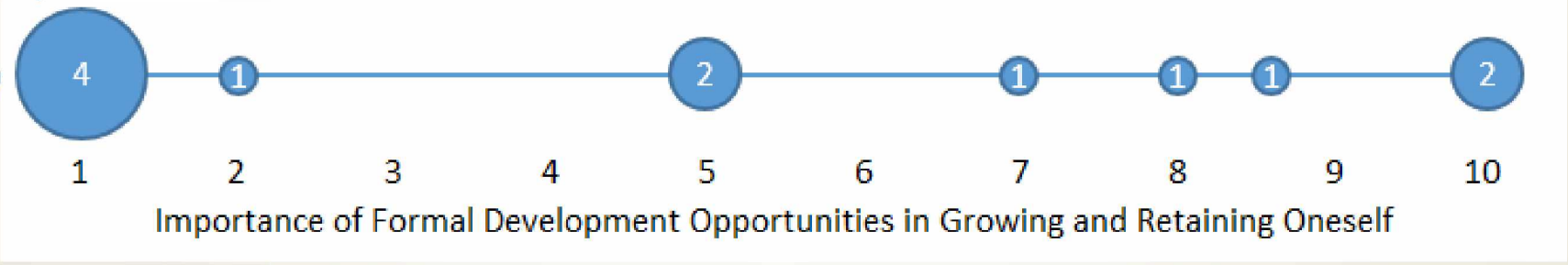


- "the greatest roadblock to advancement is the person themselves." (33%)



Importance of Formal Development Opportunities

Importance of Formal Development Opportunities in Growing and Retaining Other Individuals



Importance of Formal Development Opportunities in Growing and Retaining Oneself

Components of a Successful Program

Program Components

Participant Accountability

- Documentation of Accomplishments
- Structured IDP Reviews

Program Accountability

- Scheduled Check-Ins
- Fit For Purpose Trainings
- Attainable, Clearly Communicated Program Goals

Program Components

- Multiple Departments & Roles
- Support Functions
- Field Experience
- Diverse Range of Individuals
  - Trainings
  - Travel
  - Ad Hoc Projects
  - Community Involvement
  - Name Recognition
- Soft Skills
  - Teambuilding
  - Leadership

Program Components

- Individual Development Plan
- Career Map
- Achievement Milestones
- Duration

Program Components

- Value of a Degree
- Resume Building
- Comfort Zone
- Long Term Commitment
- Sacrifices
- Training & Certifications
- Fit For Purpose / Value Adding

Accountability Mentorship

Higher Education is "a commitment to want to take [a career] to the next level."

Program Components

"Mentorship Should Be Intentional and Targeted"

Types of Mentors

- Technical Authority
- Dissociated Senior Manager
- Single Area

Best & Worst Practices

- Clear Expectations
- Meeting Agendas
- Outside Chain of Command
- Willingness & Commitment

Barriers to Program Implementation & Long-term Success

- Economics
- Dynamic Market
- Program Management
- Executive Commitment
- Participant Retention

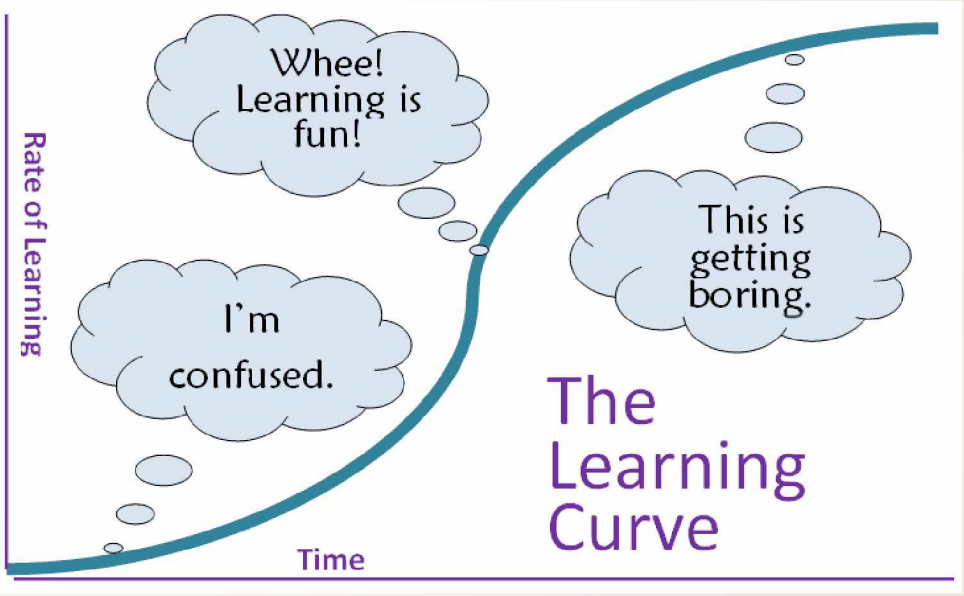
Role Duration

Adequate Time to Become Proficient (100%)

Identify & Implement Positive Change (50%)

Individual Dependent, No Set Duration (25%)

- 18 months to 3 years



Benefits

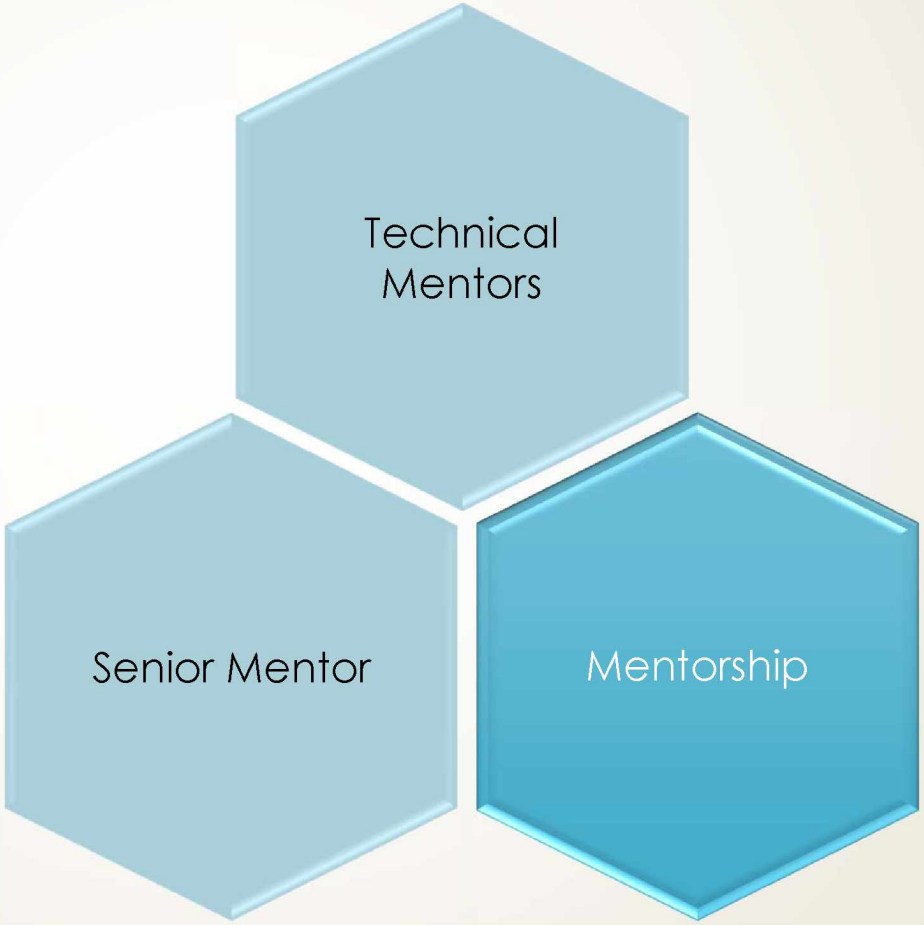
"Society grows great when old men plant trees whose shade they know they shall never sit in."

- Well-rounded Pool of Potential Leaders
- Increased Understanding of Business Capabilities & Goals
- Clear Client Communication of Business Capabilities & Bandwidth
- Increased Retention - "A Touch of Loyalty"
- Series of Improvements
- Maturity & Experience
- Motivated & Engaged
- High morale, Enthusiasm
- Vested Interest in the Company
- Pipeline of Top Performers
- Better Salespersons


The
Framework

Program Components

Program Components

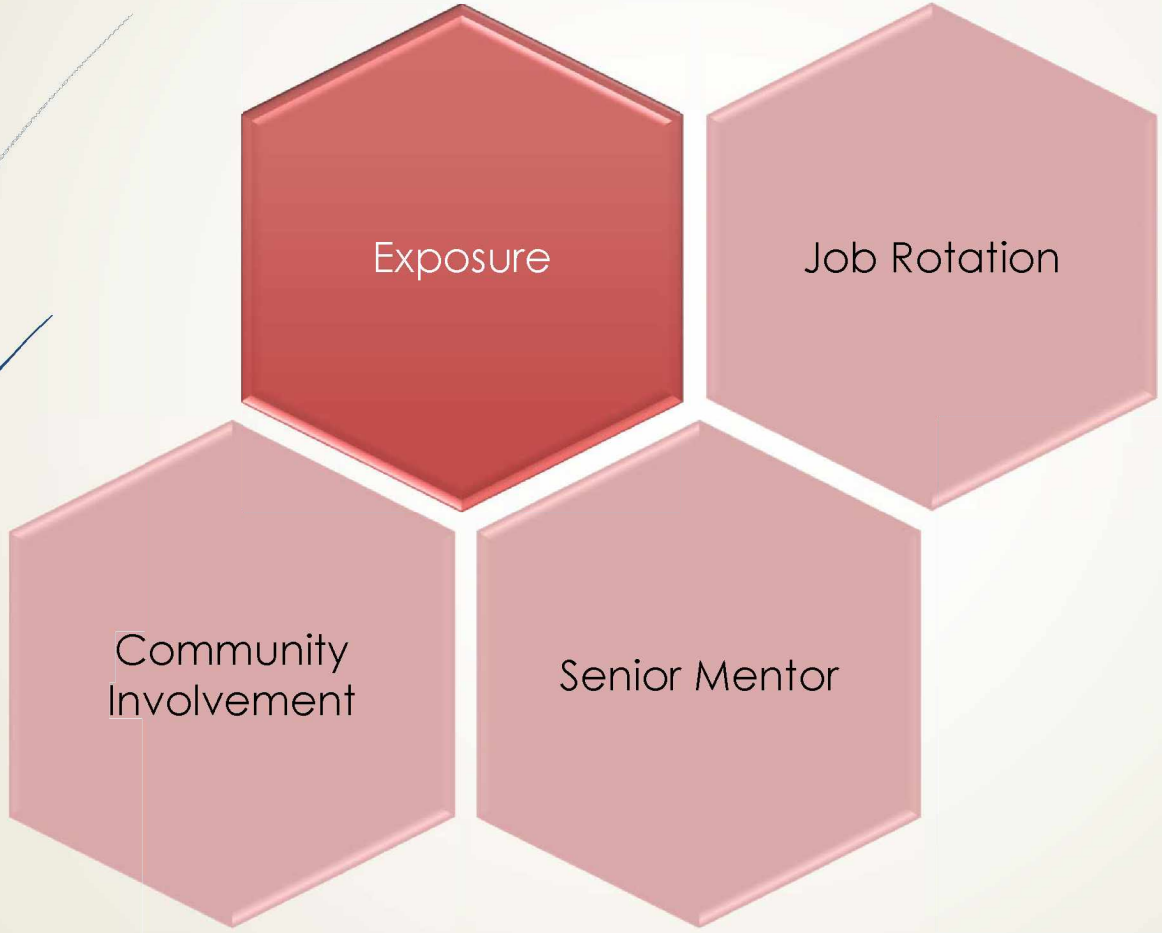


Program Components

Accountability

Program Components

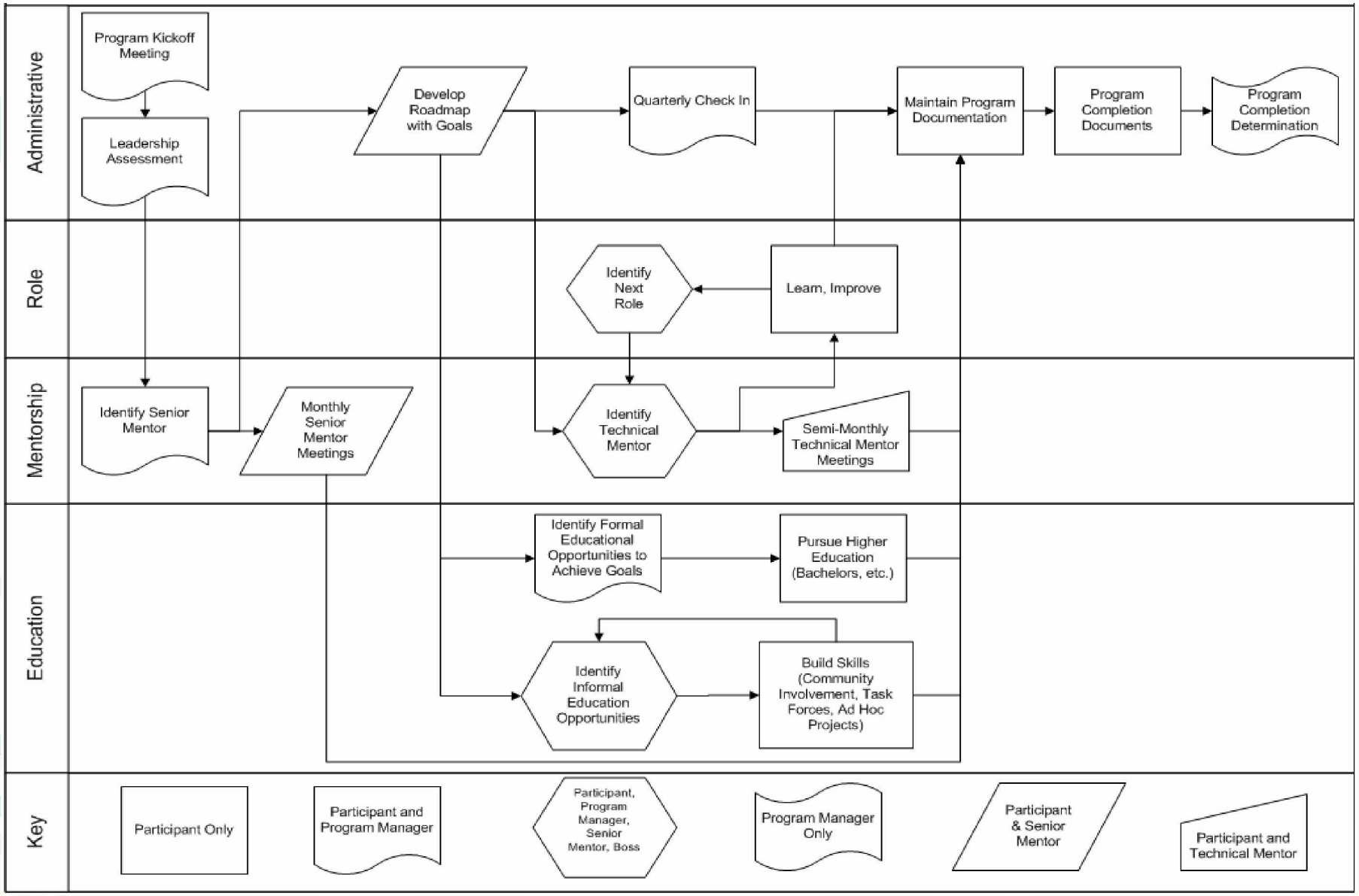
Program Components



Program Components

Framework Categories

- Administrative (Program Management, Documentation)
- Role (Job Movement every 18+/mo.)
- Mentorship (Senior & Technical Mentors)
- Education (Formal, Informal)


Administrative
Program Kickoff Meeting
Leadership Assessment
Develop Roadmap with Goals
Quarterly Check In
Maintain Program Documentation
Program Completion Documents
Program Completion Determination
Role
Identify Next Role
Learn, Improve
Mentorship
Identify Senior Mentor
Monthly Senior Mentor Meetings
Identify Technical Mentor
Semi-Monthly Technical Mentor Meetings
Education
Identify Formal Educational Opportunities to Achieve Goals
Pursue Higher Education (Bachelors, etc.)
Identify Informal Education Opportunities
Build Skills (Community Involvement, Task Forces, Ad Hoc Projects)
Key
Participant Only
Participant and Program Manager
Participant, Program Manager, Senior Mentor, Boss
Program Manager Only
Participant & Senior Mentor
Participant and Technical Mentor

Future Research

- Cost Effective, Company Specific, Business Case
- High Potential Individual Identification
- Examining Success of the Framework
  - Retention Rate Comparisons
  - Promotion/Advancement Comparisons

Lessons Learned

- Front End Load
- Build Buffer
- Manage External Commitments
- Interview Early
- Involve Experienced Writers
- Communicate with Stakeholders Clearly and Regularly


Questions?

A FRAMEWORK FOR A MULTI-YEAR DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL & GAS INDUSTRY

LESSONS LEARNED – EXECUTION STAGE

Understand External Commitments

A clear understanding of external commitments was critical to delivering this project by December of 2015. Throughout the execution stage the external commitments consisted of a) a highly demanding project, which required substantial off rotation work, b) network group commitments consisting of a leadership role in the Inspired Professionals of Alaska, an active participant in the Association for the Advancement of Cost Engineering International, and key representative on a cross Employee Network Group communication & collaboration task force, c) acceptance of a position at a new company out of state and d) preparations to move. By developing an understanding of these commitments early on the plan was built accordingly. Thoroughly understanding resource availability from day one allowed the plan to be built in a way that was successfully executed.

More Risk = More Buffer/Float

The constraint matrix for this project is defined by academic deadlines. Schedule is the most critical, followed by scope. Cost has almost no play in this project as there is not a budget in play. As a majority of the risks identified had schedule impacts, this turned into use of float and buffer in the planning stage. Since there is only one resource on this project, the critical path was pretty simple, and very few items actually have any float. The planned buffer based on the identified risks was in delivering a successful project. An excellent example is the final project report formatting. Uncertainty in regards to my ability to properly format the paper led to incorporation of buffer during the finale paper stage. This was beneficial when new formatting requirements were introduced by the graduate school. This

reformat was incorporated without delaying the deliverables because adequate buffer was built into the finalization process to support realizing a risk such as this.

Lessons Learned from Similar Projects

Lessons learned from other project, specifically Lena Petrova's and Alena Robeson's, played a huge part in successfully executing this project. Their insight to the specific deliverables was invaluable. To fully capture the benefit of prior projects lessons, a student advisory committee was utilized. The student advisory committee exists external to the project for the soul purpose of providing support based on prior project execution of similar project.

Involve Experienced Writers

Due to the complexity of the writing requirements associated with the final project report outside assistance was needed. Technical writing proficient was a requirement for completing the project, and 3rd party (outsourced) editors provided critical expertise in the editing and formatting stages of the paper. Early identification of this specialized need was critical in identifying and recruiting the correct resources to support critical path activities late in the project.

Interview Early

When approaching a research component of a project, plan the research gathering phase early and with substantial duration. Identifying, recruiting, and interviewing subject matter experts for the project was time consuming. Interviews were a learning process, and in multiple cases topics discussed in an interview led to additional questions for future interviews. By planning adequate time into the interview process, and starting early, subject matter experts interviewed early in the process were revisited to answer any new questions and provide clarifications.

ASK QUESTIONS

This lesson learned belongs on every project. Either not enough questions were asked early enough, resulting in a lesson to be learned, or adequate questions were asked resulting in a successful experience to be shared. In this project asking questions, no matter how repetitive or small, allowed for draft deliverables to be created at near final product standards. In addition, the end success of the project was be determined by how well I questioned my sponsor during the drafting of the charter and product description.

A FRAMEWORK FOR A MULTI-YEAR DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL & GAS INDUSTRY

LESSONS LEARNED – PLANNING STAGE

Early Feasibility Analysis

A feasibly analysis was conducted in late August of 2014. This analysis consisted of a project schedule built around academic deadlines and resource leveled around my slope schedule. This feasibility analysis provided early identification that the Fall 2014 academic deadlines were not reasonable. As such, the risk mitigation matter of early deferral was utilized. This is a lesson learned because the feasibility analysis should have been completed prior to the Fall 2014 drop deadline, which would have eliminated the need to defer. If this feasibility analysis had been completed in Spring or early Summer 2014 then the option to start academic deliverables prior to semester start could have eliminated the need to defer in the first place. Given the nature of my external commitments at that time it is unlikely, however because the feasibly analysis was not done sooner the option to complete 686A in Fall 2014 did not exist.

Define the Product Early

While early sponsor buy in was critical to forming the project, the actual product to be delivered was not defined until late in the planning process. If this has been well defined as part of the initial chartering session and then subject to change control much rework would have been eliminated form the planning process.

Understand External Commitments

A clear understanding of external commitments was critical to delivering the plan for this project by April of 2015. Throughout the planning stage the external commitments consisted of a) a highly demanding new project, which required 17 weeks of near continuous effort at the onset and much off rotation work, b) participation and completion of a Leadership Development Program reliant on out of

office work times, c) network group commitments consisting of a leadership role in the Inspired Professionals of Alaska, an active participant in the Association for the Advancement of Cost Engineering International, and key representative on a cross Employee Network Group communication & collaboration task force, d) extenuating family requirements. By developing an understanding of these commitments early on the plan was built accordingly. Without thoroughly understanding resource availability from day one it would not have been possible to develop an executable plan.

More Risk = More Buffer/Float

The constraint matrix for this project is defined by academic deadlines. Schedule is the most critical, followed by scope. Cost has almost no play in this project as there is not a budget in play. As a majority of the risks identified had schedule impacts, this turned into use of float and buffer in the planning stage. Since there is only one resource on this project, the critical path was pretty simple, and very few items actually have any float. This made planning buffer into activities based on the identified risks crucial to a successful planning stage. An excellent example is the IRB process. Both the uncertainty of the IRB process and past lessons learned on the IRB led me to include substantial buffer for this set of activities. This was beneficial when a preliminary IRB Submission Review was introduced into the project (by Dr. Kim). This review process was incorporated without delaying the deliverables because adequate buffer was built into the drafting process to support realizing a risk such as this.

Lessons Learned from Similar Projects

Lessons learned from other project, specifically Lena Petrova's and Alena Robeson's, played a huge part in successfully executing the planning stage of this project. Their insight to the specific deliverables was invaluable. To fully capture the benefit of prior projects lessons, a student advisory committee was created. The student advisory committee exists external to the project for the soul purpose of providing support based on prior project execution of similar project.

ASK QUESTIONS

This lesson learned belongs on every project. Either not enough questions were asked early enough, resulting in a lesson to be learned, or adequate questions were asked resulting in a successful experience to be shared. In this project asking questions, no matter how repetitive or small, allowed for draft deliverables to be created at near final product standards. In addition, the end success of the project will be determined by how well I questioned my sponsor during the drafting of the charter and product description.

A FRAMEWORK FOR A MULTI-YEAR DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL & GAS INDUSTRY

KNOWLEDGE AREA SELECTION

Note: Execution stage changes and addendums are indicated by orange font. All PPM Updates are indicated in green font.

Communication Management

Communication has already proven to be a weak point in my project – largely due to my early deferral of the class in Fall 2014. As a rotational slope worker I am constantly changing physical locations and my access to various communication methods fluctuates. All three committee members reside in Anchorage, allowing for in person communication to be partially utilized. Without clear expectations on communication frequency and method it would be too easy to fall into the routine of only checking in every six weeks as I travel through Anchorage. A strong communications plan clearly identifying multiple communication methods that take into account the remote location of my career location will be key to the success of this project.

To assess my ability to follow the communication plan and measure its effectiveness I will implement three controls. Initial agreement by committee members will be documented agreeing that the communication plan will provide adequate information to keep the individual informed. At each status update milestone I will unofficially inquire where the committee members believe I am in the project. If the committee members and I are in alignment, communication will be deemed effective. If there appears to be a gap between myself and one or more of the committee members I will revisit and reassess the communication plan with the individuals.

February 20, 2015 update: Communication baseline established for each committee member and documented in communication plan.

March 16, 2015 update: Communication plan updated in the PMP. Clarification meeting with the project sponsor held. Communication via telephone (per the communication plan) with project Committee Member. Need to focus on improved communication with Project Advisor.

April 5, 2015 update: Communication plan finalized in the PMP. Sufficient communication with project sponsor through text and email to meet administrative deadlines – the focus has been access to confidential information (IRB driven) and final product description agreement. In person meeting with Project Advisor resulted in receipt of PPM 3 redlines. Need to shift focus to improved communication with the third Project Committee Member.

Project Execution Phase Plan: Communication with all team members continues to be a challenge. In 686A I consistently communicated well with the Project Sponsor, yet went back and forth between the Project Advisor and the third Project Committee Member. Communication is critical to the success of a project, and as such I will continue to have this as a focus in 686B.

The metrics I assigned for 686A were effective. I will retain these metrics for 686B. I expect to receive greater variation in responses to the unofficial inquiry as I expect execution to be less academically structured in comparison to the planning stage.

September 18, 2015 update: KPI Log added to PMP, which will assist in measuring the communication metrics as defined in the PMP. Per this log, have set up a calendar reminder to send out inquiry of my project status to committee members upon submission of PPM1. Good discussion with project advisor over project, specifically focused on how I have "as needed follow-up interviews" planned during the report writing phase of my project. The concern was these follow-up questions/clarifications would be considered raw data. It was communicated by project advisor that this is fine and not part of the initial data collection/research expected to be complete for PPM 1.

October 9, 2015 update: KPI Log updated in PMP. Communication with Project Sponsor and Project Advisor happened verbally. Clarity on the Go/No-Go Checkpoint was gained through conversation with Project Advisor. Consensus between Project Sponsor, Project Advisor, and Project Manager is the project is slightly behind but recoverable. This consensus shows communication with Project Sponsor and Project Advisor is on track. Communication with the third Project Committee Member has been lacking and will become the focus on the Project Manager in the coming month.

November 6, 2015 update: Verbal communication with Project Sponsor supported by receipt of PPM 2 grade. Verbal update with Project Committee Member, which covered current status and ongoing concerns. Consensus between Project Advisor, Project Committee Member, and Project Manager is the project is on track for completion.

November 20, 2015 update: Project Committee Member provided feedback on PPM 3 deliverables. Email communication with Project Committee Member clarifying comments and discussing issue resolutions. Instant message communication with Project Sponsor, who is out of town for a conference. Consensus between Project Advisor, Project Committee Member, and Project Manager is the project is on track for completion.

December 4, 2015 update: By choosing communication as a focus knowledge area for this project improved my understanding of communication management. I was able to identify measureable ways of tracking communication and associated quantitative measurements of success. Having it as a focus area enabled greater visibility to my communication management performance.

Stakeholder Management

Managing key stakeholders is critical to the success of a project. Due to the rotational aspect of my project and vacillating plan to accomplish the work it is critical to effectively manage my stakeholder's expectations. This has already proven difficult with committee members due to deferral of the planning stage of this project. A solid Stakeholder Management Plan will be established consisting of a stakeholder resister and a stakeholder influence analysis. Based on the Stakeholder Management Plan, a strong

Communication Management plan will be developed focused on maintaining alignment with key stakeholders.

Mastery of stakeholder management will be exhibited in two primary ways. The first is through early identification and communication with stakeholders targets for interviews ~~and surveys~~. This will highlight the importance of stakeholder insight while providing opportunity for early participation. Informally interviewing stakeholders will allow me to impress the importance of this project for stakeholders. The second way I will prove mastery of stakeholder management will be through a small survey utilizing a 1-10 scale inquiring on the effectiveness of my communication and if the project outcome addressed their expectations.

February 20, 2015 update: Stakeholder management plan updating to include potential interview sources. Communication plan built identifying stakeholder communication needs.

March 16, 2015 update: Stakeholder management plan incorporated into PMP. Key stakeholders have reviewed PMP and issued comments for incorporation.

April 5, 2015 update: Stakeholder management plan finalized in PMP. Comments from key stakeholders have been incorporated into key documents, including the Risk Register, Charter, and Product Description.

Project Execution Phase Plan: Stakeholder management went very well in 686A. Key stakeholders, including the Project Sponsor, were involved early and often. Initial conversations have been held with some stakeholders critical to execution phase. I will continue to focus on stakeholder management in 686B, focusing on early identification and communication with potential interviewees. I will retain the end metric of issuing a small survey upon project completion.

September 18, 2015 update: Early identification and communication with stakeholders worked wonders during the research phase of execution. Six of seven executive level stakeholders were available during the timeframe scheduled for interviews. This is a direct result of effective stakeholder management, specifically of informal and early communication followed up by formalized communication in the stakeholders preferred format (email, via secretary, text, etc.).

October 9, 2015 update: With interviews complete focus has shifted to stakeholders involved in completion of the deliverables. Primary document reviewers have been engaged and are aware/prepared for draft documents for review. Student Advisor has been re-engaged for lessons learned in regards to document drafting and format.

November 6, 2015 update: Primary document reviewers remain fully engaged, providing review and feedback on draft deliverables. Student Advisor remains engaged, providing content suggestions. As the presentation dates overlap with Project Manager external commitments, effected stakeholders have been informed.

November 20, 2015 update: Primary document reviews remain fully engaged, providing multiple sets of review and input on draft deliverables. Student Advisor engaged for review and content suggestions. Tentative presentation time and date released by Administrative stakeholder, this information has been relayed to stakeholders who will be effected by the Project Managers absence from external commitments at the time of presentation.

December 4, 2015 update: Having stakeholder management as a selected focus area was of great benefit in executing this project. The additional visibility to this knowledge area assisted in risk management, especially because many of the identified risk mitigation methods required early stakeholder engagement.

Scope Management

Scope creep kills projects. Currently my project is conceptual and the details of the scope will undergo many alterations. To exhibit mastery of scope management I will have a solid scope statement with a schedule of activities with a dictionary of exactly what scope is to be accomplished in each activity. This will be a quantitative dictionary providing the basis for identification of changes. A change control process will be developed to evaluate trends and changes. The change controls process will analyze the value of the change and the effect of the change on both schedule and required man-hours. The specifics and decision for each proposed change will be documented in the change order log.

Mastery will be established by a comprehensive change order log. As potential changes are encountered the project committee will be informed and consulted on an as needed basis. Through informal methods a conversation will happen at major milestones to identify scope creep and discuss the change order log. Agreement that in progress and planned work falls within the original plan or is captured on the change order log will demonstrate effective scope management.

February 20, 2015 update: Change process is established and being utilized. Change log has been created. Primary change to date is the removal of surveys from the project plan. Meetings with the Project Sponsor have provided clarification on framework requirements, resulting in a revised scope statement.

March 15, 2015 update: Change process is being utilized. A change was proposed to move the project from being product oriented to research oriented. Further investigation of the impact to the project and clarification of Project Sponsor expectations has led to a rejection of this change request. This is proof the change process is working.

April 5, 2015 update: Change process finalized in PMP. No major changes to process since implementation. Continue to utilize Change Requests and Change Log. Stakeholder suggested scope expansion change to include change of industry and new hires. Change was rejected as it is in conflict with the Project Charter.

Project Execution Phase Plan: Scope management will become critical to success in execution phase, and therefore will be retained as a focus knowledge area. During 686A the focus was developing a baseline scope statement and a viable change process. In 686B focus will shift to identification, evaluation, and incorporation (if approved) of changes. Once the Planning Stage baseline is finalized any addition, deletion, or substantial modification of an activity in the schedule will be evaluated as a change.

September 18, 2015 update: Change process as defined in the PMP is phenomenal. 9 change requests have been documented, with 8 approved and 1 rejected. Use of change control process greatly helps contain the change, ensuring full impacts of the change are understood and taking into account when making a final decision. End result of recent change control efforts (which included a schedule crashing and scope reduction exercise) is a project achievable within the primary project constraint of time.

October 9, 2015 update: The change process as defined in the PMP continues to work well. 1 additional change has been documented and approved. Use of the change control processes ensured clarity on the effects of running two deliverables paths simultaneously in the schedule opposed to sequentially.

November 6, 2015 update: The change process as defined in the PMP continues to work well. One additional change has been approved, and one change has been rejected. Use of change control processes ensured clarity of schedule activities, combining two sections that were previously at too low of a level.

November 20, 2015 update: The change process ad defined in the PMP continues to work well. No changes have been approved. Verbal change suggestions by external stakeholders have been avoided as the conversation of the change process and potential effects discouraged the stakeholders from formally submitting their suggestions.

December 4, 2015 update: Solid change management was critical to the success of this project. Having scope management as a knowledge area forced me to follow the defined change management process and keep my change documentation up to date. This was crucial in preventing scope creep, and in only implementing change with value to the project.

A Framework for a Multi-Year Development Program Targeting High Potential Individuals in the Alaska Oil & Gas Industry

Project Management Plan (PMP)

Executive Sponsor – Josie Wilson

MSPM Project Advisor – Roger Hull

Project Manager – Ryan Loomis

Original Plan Date: February 12th, 2015

Revision Date: December 4th, 2015

Revision: 2.0

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REVISION HISTORY

Revision Number	Date	Comment
0.1	February 12, 2015	Initial Table of Contents
0.2	February 23, 2015	Initial Draft
0.3	March 16, 2015	Initial Draft for Issue
1.0	April 7, 2015	Final Draft for Issue
1.1	September 17, 2015	Execution Updates
1.2	October 9, 2015	Execution Updates
2.0	December 4, 2015	Final Executed Document for Issue

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1.0 PROJECT OVERVIEW

1.1 CURRENT STATE

The Alaska Oil & Gas industry has a limited labor pool which creates a high demand for talented individuals. As a result competition is fierce among the companies in the Alaska's Oil and Gas Industry. Furthermore, companies devote considerable resources to recruiting and training talent, only to see that individual leave for a competitor or Alaska altogether; individuals who exhibit potential for leadership are difficult to retain. Individuals with experience in all aspects of arctic oil & gas construction, from engineering through operations, are in the highest demand. Despite this, some of largest employers in Alaska do not have solidified long term programs for developing talent in these areas. There is considerable need for the companies in Alaska's Oil and Gas Industry to develop and implement a plan which will ultimately result in the retention of talented, skilled employees.

1.2 FUTURE STATE

The primary outcome will be increased retention of high potential individuals. The desired secondary outcome is a more knowledgeable work force and increased cross business collaboration.

1.3 NEED

This project will produce a framework which can be utilized by companies to implement competitive long term development programs specific to the unique Alaska Oil & Gas industry.

2.0 SCOPE

2.1 PROJECT SCOPE OF WORK

This project will produce three deliverables:

1. a project management plan that details exactly how the project will be executed

2. a final project report

3. a framework for a multi-year development program targeting high potential individuals in the Alaska Oil & Gas industry. The produced framework will focus on job movement every 18-24 months. This framework will touch on mentorship best practices and applicable higher education. The framework will come from analysis of a compilation of sources, including self-conducted literature reviews and interviews with relevant individuals.

The planning of this project will begin August 29th, 2014 and the execution will be completed by December 15st, 2015.

Project Exclusions

- This project does not include implementation of the development program.
- This framework will not be tailored to a specific company, resource, or individual.
- This project does not include a training associated with applying or handing off the documentation.
- This project does not include a financial breakdown or cost analysis.
- There will not be a real world test on the effectiveness of the designed program.

2.2 DELIVERABLES

2.2.1 PROJECT MANAGEMENT DELIVERABLES

2.2.1.1 PROJECT MANAGEMENT PLAN

Description – The Project Management Plan (PMP) will define all aspects executing of the proposed project.	**Deliverable Acceptance Criteria** – PMP to be reviewed and accepted by the Project Advisor, Roger Hull.
	Standards for Content and Format – The PMP will adhere to the standards and content of the PMBOK and the UAA MSPM Program.
	Quality Review – A draft will be submitted to all committee members for initial review.

2.2.1.2 FINAL PROJECT REPORT

Description – The Final Project Report (FPR) will provide a comprehensive review of the research conducted in this project, final project outcomes, and project lessons learned.	**Deliverable Acceptance Criteria** - FPR to be reviewed and accepted by the Project Advisor, Roger Hull.
	Standards for Content and Format – The FPR will be structured mirroring research papers published by PMI.
	Quality Review - A draft will be submitted to all committee members for initial review.

2.2.2 PRODUCT DELIVERABLES

2.2.2.1 MULTI-YEAR DEVELOPMENT PROGRAM FRAMEWORK

Description – The Multi-Year Development Program Framework (FWK) will target retention of high potential	**Deliverable Acceptance Criteria** – FWK to be reviewed and accepted by the Project Sponsor, Josie Wilson.
	Standards for Content and Format – The FWK will be structured according to research findings and sponsor input.

individuals by outlining a program containing three key components: multiple job assignments, mentorship best practices, & relevant higher education. A detailed account of the FWK is found in Appendix G: Product Description.	**Quality Review** – Content will be communicated with the Project Sponsor at each PPM milestone. A draft will be submitted to all committee members for initial review.

2.2.3 Deliverable Approval Authority Designations

Deliverable Number	Deliverable	Approvers (Who can approve)	Date Approved
01-PMP	Project Management Plan (PMP)	Roger Hull	5/11/15
02-FPR	Final Project Report	Roger Hull	11/25/15
03-FWK	Multi-Year Development Framework	Josie Wilson	12/1/15

2.2.4 Deliverable Acceptance Procedure

All final deliverables will be submitted to committee members for review and approval through Blackboard. Acceptance of deliverables 01-PMP and 02-FPR will be indicated in the form of a passing grade (>80%). Acceptance of deliverable 03-FWK will be indicated in writing.

2.3 Work Breakdown Structure (WBS)

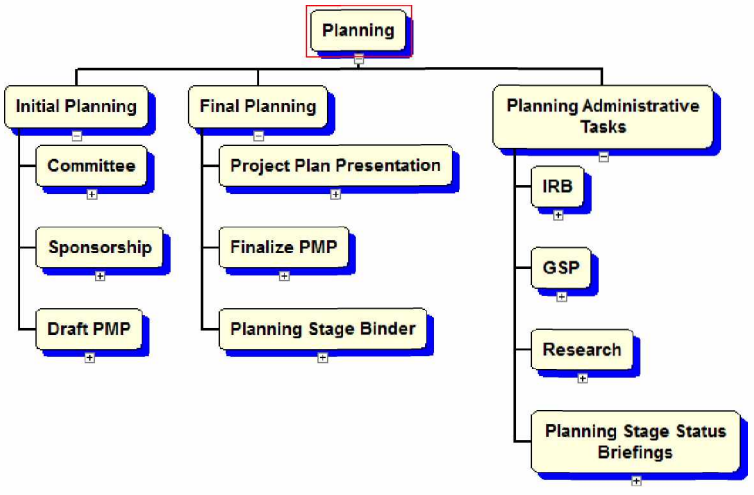
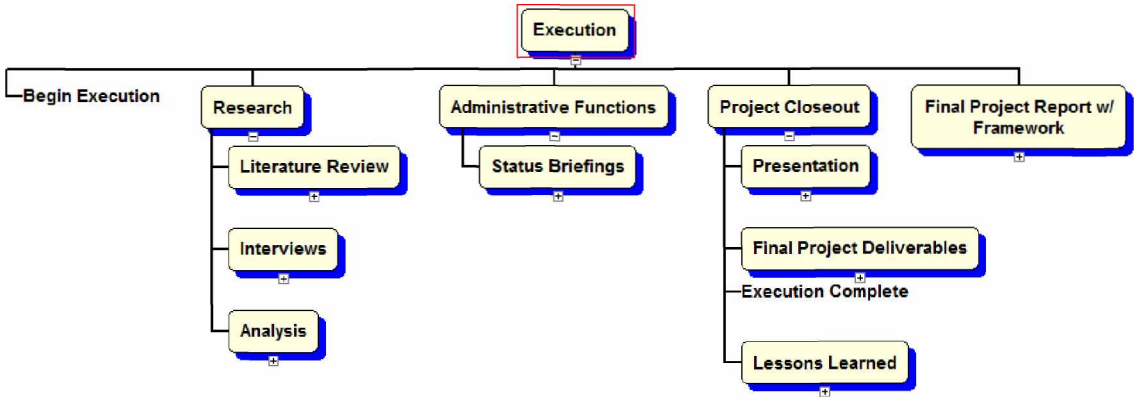


Figure 1: WBS - Summary

The project is split into three phases: Initial Feasibility Review, Planning, and Execution. Full WBS can be found at Figure 6: WBS – Planning Phase and Figure 7: WBS – Execution Phase located in Appendix A.



2.4 CHANGE CONTROL

2.4.1 CHANGE CONTROL PROCESS

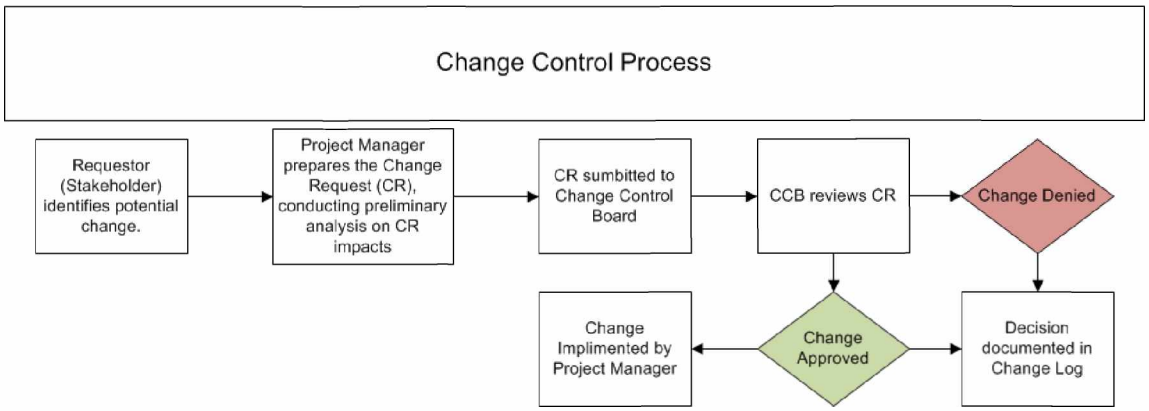


Figure 2: Change Control Process

*Form 9: Change Request Form and Form 10: Change Log Template located in Appendix C - Forms.

2.4.2 CHANGE CONTROL BOARD (CCB)

The Project Manager has unilateral authority to accept or reject proposed changes.

3.0 OVERALL STRATEGY

3.1 PROJECT MANAGEMENT APPROACH

Due to external constraints on the Project Managers availability, this project will be executed in three week segments of time. The project will be on soft hold for alternating segments. The Project Manager has full authority to adjust project requirements and plan around these soft holds.

3.2 Critical Success Factors

- Deliverables are completed and submitted on time
- Sufficient data is collected to complete the development program execution plan
- Final PMP is approved by Project Advisor
- Final FPR is accepted by Project Advisor
- Final FWK is accepted by the Project Sponsor

3.3 Project Logistics

All committee members physically reside in Anchorage. The Project Manager resides in Anchorage less than half the time. Primary communication will happen in person in Anchorage, however it will be necessary to utilize phone calls and video conferences. Logistics between committee members and the Project Manager will be coordinated by the Project Manager. Specific logistic requirements to be outlined in the communication plan.

4.0 Project Organization

4.1 Stakeholder Management Plan

A stakeholder is an individual or organization with "a vested interest in the success of [the] project." As such, an interviewee is a data source and not necessarily a stakeholder.

4.1.1 Stakeholder Information

ID	Name	Position	Role	Contact Information
1	Josie Wilson	CH2M HILL O&G Training & Leadership Development Manager	Project Sponsor	Josie.Wilson@ch2m.com
2	Roger Hull	UAA Faculty	Project Advisor	RKHull@uaa.alaksa.edu
3	LuAnn Piccard	UAA Faculty	Committee Member	LPiccard@uaa.alaska.edu
4	Meuy Saechao	UAA MSPM Admin	UAA Requirements Assistance	MSaechao2@uaa.alaska.edu
5	Stephanie Loomis	Educational Mentor & Writing Reviewer	Document Review	sloomis05@hotmail.com
6	Scott Loomis	Program Manager & Business Development	Document Review	Scottloo05@hotmail.com
7	Alena Robson	Student Advisor	Student Advisor	AlenaRobson@gmail.com
8	Manager Interviewees	Various	Source	Various

9	Participant Interviewees	Various	Source	Various
10	Executor Interviewees	Various	Source	Various

4.1.2 STAKEHOLDER ASSESSMENT

ID	Name	Requirements	Expectations	Influence	Interest
1	Josie Wilson	Assist in Stakeholder identification & management. Assist in procurement of materials for lit review. Communication during execution to keep document in format that provides value. Attend presentation of final deliverable.	Finished product that can be utilized by Engineering / Construction / Operations companies in Alaska.	High	High
2	Roger Hull	Advisor, Go/No-Go reviews, PPM review/edits/comments. Attend presentation of final deliverable.	Strong PMP with realistic deliverables.	High	High
3	LuAnn Piccard	PPM review/edits/comments. Open communication throughout project. Attend presentation of final deliverable.	Strong PMP with realistic deliverables. PPMs submitted on time.	High	High
4	Meuy Saechao	Communication as administrative issues arise. Assistance navigating deferral/extended timelines.	Administrative tasks are completed.	Medium	Medium
5	Stephanie Loomis	Regular communication. Deliverable review.	Passing documentation	Low	High
6	Scott Loomis	Regular communication. Deliverable review.	Passing documentation	Low	High
7	Alena Robson	Communication as needed while planning and executing the project.	Complete documentation, access to final deliverable.	Low	Medium

8	Manager Interviewees	Contact as needed for interview input.	Insight applicable to the management and retention of individuals in the Alaska O&G industry.	Low	Low
9	Participant Interviewees	Contact as needed for interview input.	Insight applicable to the management and retention of individuals in the Alaska O&G industry.	Low	Medium
10	Executor Interviewees	Contact as needed for interview input.	Insight applicable to the management and retention of individuals in the Alaska O&G industry.	Low	Low

4.2 PROJECT TEAM

4.2.1 PROJECT TEAM ORGANIZATIONAL BREAKDOWN STRUCTURE

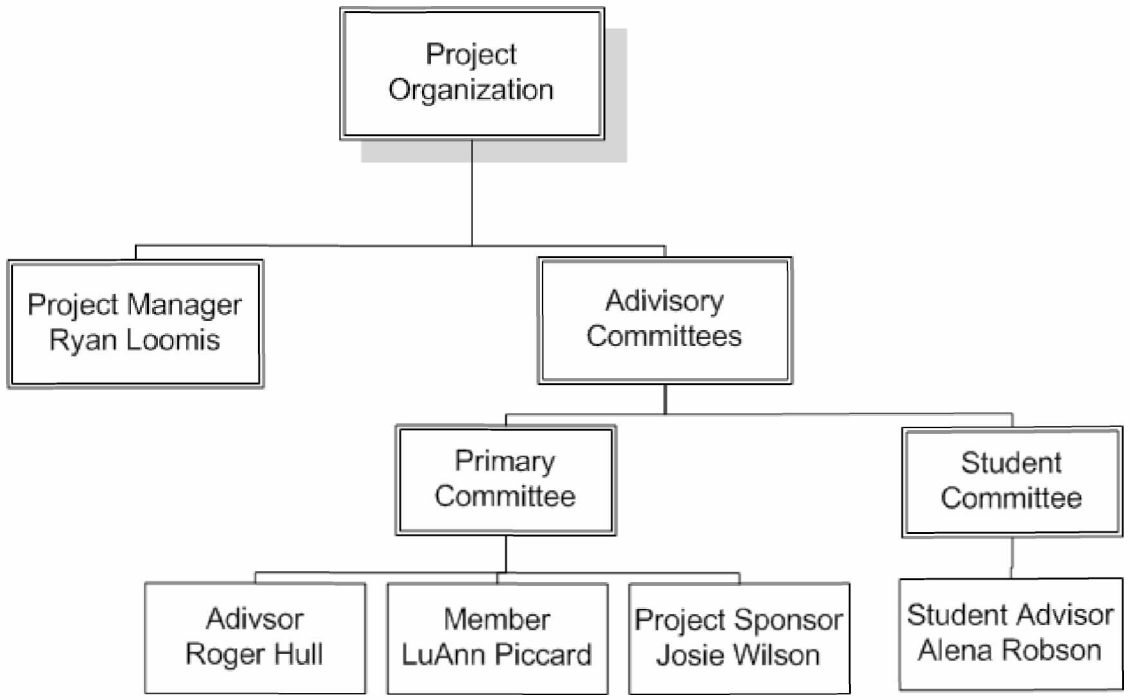


Figure 3: Project Team Organizational Breakdown Structure

4.2.2 PROJECT TEAM ROLES AND RESPONSIBILITIES

ROLE	RESPONSIBILITY	NAME
Project Manager	Plan and execute the project.	Ryan Loomis
Project Advisor	Provide review and deliverable acceptance.	Roger Hull
Committee Member	Provide deliverable review.	LuAnn Piccard
Project Sponsor	Provide final deliverable input and acceptance.	Josie Wilson
Student Advisor	Provide as needed support on project planning and monitoring.	Alena Robson

5.0 PROJECT MANAGEMENT AND CONTROLS

5.1 ASSUMPTIONS

- The advisory committee will be available review all project documents and PPM's
- All deliverable can be completed by completion of PM686 class series
- The project manager will be the only resource assigned to work packages
- There is no funding associated with this project
- Sufficient data from interviews to support analysis.

5.2 CONSTRAINTS

	Schedule	Scope	Cost
Fixed	X		
Somewhat Flexible		X	
Flexible			X

Figure 4: Constraint Priority Matrix

5.3 RISK MANAGEMENT

5.3.1 RISK MANAGEMENT STRATEGY

Risks have been identified in two categories: External Risks (those outside of project control) and Internal Risks (those inside of project control). Risk effect has been assessed and an appropriate response documented. As risks occur, changes will be managed through the Change Control Process outlined in section 5.5 Change Control. As risks become obsolete they will be marked inactive in the Risk Register.

5.3.2 PROJECT RISK IDENTIFICATION, ANALYSIS, AND STATUS

Risk Register

Risk Name	Description of Risk	Likelihood	Impact	Risk Level	Response Type	Owner	Status	Comment
External Risks (Conditions outside the control of the project)								
PMP	PMP not approved by Sponsor	Low	High	Low	Mitigate; Check in with sponsor throughout planning process	Sponsor	Closed	9/18/15 - Did not occur.
PMP	Hardware Issues	Low	High	Low	Mitigate; back up all work to cloud and external hard drive	PM	Closed	9/18/15 - Mitigating, has not occurred. 12/4/15 - Did not occur.
Research	Lack of available interviewees	Medium	Medium	Medium	Mitigate; early identification and contact of interviewees	PM	Closed	9/18/15 - Early identification and contact has somewhat mitigated this risk, however it will continue to be monitored until followup interviews are complete. 10/9/15 - Interviews complete, risk has passed.
IRB	IRB denies project	Low	High	Medium	Accept; defer to next semester and re-evaluate project topic	IRB, PM	Closed	9/18/15 - Did not occur.
PMP	Project manager becomes Ill	Low	Low	Low	Mitigate; PM to get flu shot & drink Emergen-C. PM to manage opportunities to accelerate schedule.	PM	Closed	9/18/15 - Mitigating, has not occurred. 12/4/15 - Successfully mitigated.
Presentations	PM is not available to attend/call in at schedule presentation times	Low	High	Medium	Mitigate; early identification of presentation dates & times. PM to reschedule flights around these dates.	PM	Closed	9/18/15 - Mitigated, still risk of flights not aligning. Continue to monitor until final presentation. 12/4/15 - Successfully mitigated.
Class Attendance	PM is not available to attend/call in to scheduled class sessions.	Low	Medium	Low	Mitigate; early identification of class dates. PM to reschedule flights around these dates.	PM	Closed	9/18/15 - Mitigated, still risk of flights not aligning. Continue to monitor until final class. 12/4/15 - Successfully mitigated.
PMP, Project Completion	Project Manager has unscheduled work shifts or extended work shifts.	High	High	High	Mitigate; PM to decline optional OT, build slack into schedule by reducing PM resource availability. Discuss with supervisor, clear communication on R&R commitments. Project deadlines are to be incorporated into PM's Outlook calendar.	PM	Closed	9/18/15 - Mitgation actions and change control process allow for occurance of this risk to be controlled. Impacts are currently minimal due to ability to crash the schedule and reduce scope via the change control process. 12/4/15 - Successfully mitigated.
PMP, Project Completion	Project Manager is only available on a rotational basis	High	High	High	Accept; schedule built to accommodate planned slope hitches	PM	Closed	9/18/15 - Occurred, plan reflects this accepted risk.
IRB	IRB delays response	Low	Low	Low	Accept; inform advisor	Committee, PM	Closed	9/18/15 - Did not occur.
Project Completion	Family Emergency of committee member or PM	Low	Low	Low	Accept; delay project if severe enough	Committee, PM	Closed	9/18/15 - Did not occur.
PMP	Committee members do not communicate on time	Medium	Low	Low	Mitigate; communicate early and often	Committee, PM	Closed	9/18/15 - Did not occur.
Internal Risks (Conditions within the control of the project)								
Project Completion	PM Defers	High	Medium	High	Mitigate; Plan PM686A and 686B a semester apart. Work on deliverables prior to start of semester.	PM	Closed	12/4/15 - Successfully mitigated.
Research	Lack of Data	Medium	High	Medium	Mitigate; determine sources during planning phase. Begin contact of potential sources during planning.	PM	Closed	12/4/15 - Successfully mitigated.
Project Completion	Project not complete on time	High	Medium	High	Mitigate; Use SPI as KPI, utilize comments from committee	PM	Closed	12/4/15 - Successfully mitigated.
Slippage	Project Manager does not prioritize time	Medium	Medium	Medium	Accept; crash tasks	PM	Closed	9/18/15 - Risk has occurred, schedule crashed and change control process utilzed to minimize effects. 12/4/15 - Accepted, closed
Scope Creep	Project scope grows to an unmanageable level	Medium	High	Medium	Mitigate; utilize change control process.	PM	Closed	9/18/15 - Change control process is being used, as a result scope creep has been stalled. Continue to monitor and control this risk. 12/4/15 - Successfully mitigated.
PMP	Project Manager takes vacation	High	Low	Medium	Mitigate; schedule built to accommodate planned vacations	PM	Closed	9/18/15 - Unavilable for 4 days, this resource availablity has been incorporated into the project schedule. 10/9/15 - Risk occurred, could occur again, reset to open status 12/4/15 - Did not reoccur.
Closeout	Delay in Closeout	Low	Low	Low	Mitigate; collect lessons learned throughout execution process	PM	Closed	12/4/15 - Successfully mitigated.

5.4 PROCUREMENT MANAGEMENT PLAN

The Expectations for PM 686A and 686B Capstone Project Advising document provided by the UAA MSPM Department will be signed by all committee members. No other formal pledges will be utilized on this project. No formal contracts will be utilized on this project.

5.5 PROJECT TIMELINE

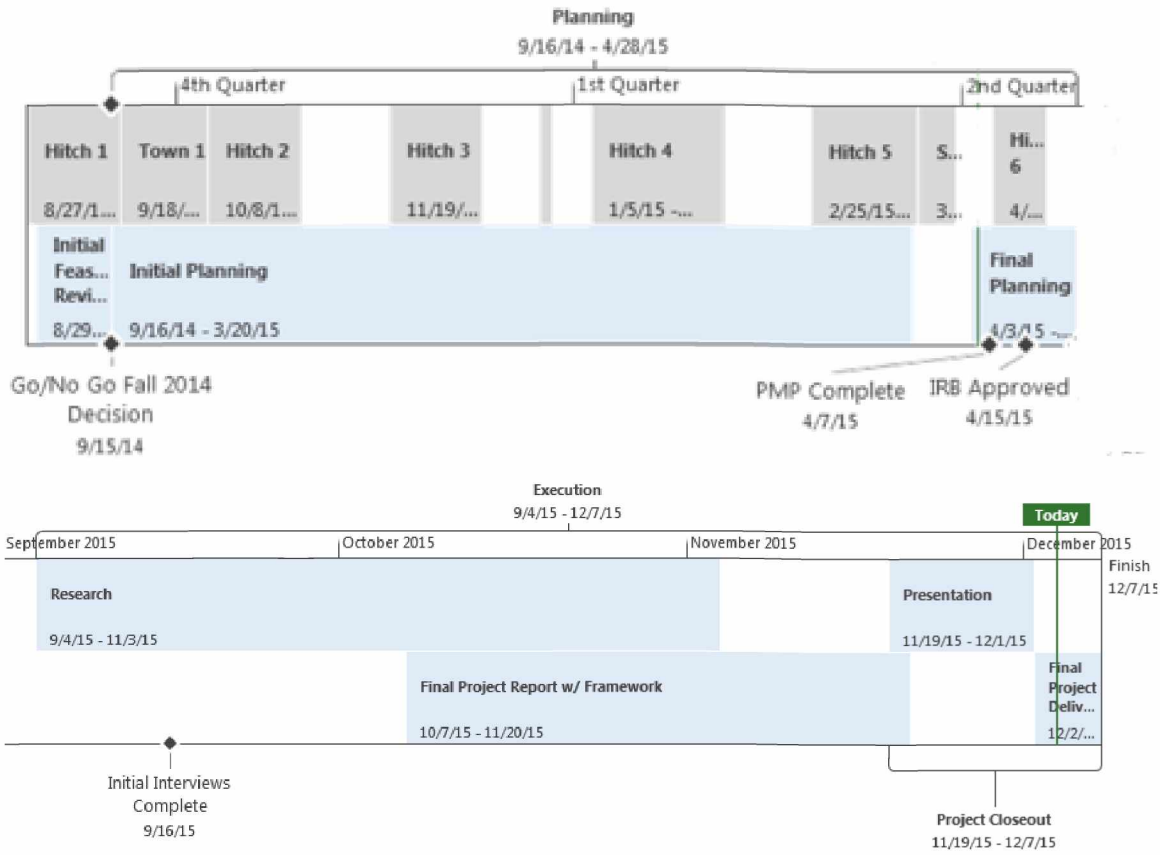


Figure 5: Project Timeline

*Grey activities indicate periods with no planned project work.
**See Figure 8 in Appendix B for detailed Project Schedule

5.6 PROJECT BUDGET

There are no costs directly associated to this project. Any expenses will be covered by the project manager.

5.7 COMMUNICATION PLAN

5.7.1 COMMUNICATION MANAGEMENT APPROACH

Initial inquiry with each committee member will document preferred communication method and frequency. Responses from this inquiry are integrated into the Communication Matrix below. At each status milestone committee members will be

asked for their impression on project status. If the committee members and Project Manager are in alignment, communication will be deemed effective. If there appears to be a gap between the Project Manager and one or more of the committee members then the communication plan will be revisited and reassessed with the individual.

All project documentation will be available through Blackboard.

5.7.2 COMMUNICATION MATRIX

ID	Name	Communication Frequency	Communication Level of Detail	Preferred Communication Medium
1	Josie Wilson	Three times every six weeks.	High Level, with as needed specifics.	In person, text
2	Roger Hull	At each PPM, open communication as needed throughout the project.	Detail	Email
3	LuAnn Piccard	Twice every six weeks.	Detail	In person, phone
4	Meuy Saechao	As necessary.	High Level	Email, phone
5	Stephanie Loomis	As needed.	Detail	Email, phone
6	Scott Loomis	As needed.	Detail	Email, phone
7	Alena Robson	As needed.	High Level	Text, email
8	Manager Interviewees	As needed.	High Level	Email
9	Participant Interviewees	As needed.	High Level	Email
10	Executor Interviewees	As needed.	High Level	Email

5.7.3 PROJECT STATUS REPORTS

Project Status Reports will be prepared within one week of PPM deadlines. These will be available to all committee members via Blackboard. Planning Stage Project Status Reports are included in Appendix H.

5.8 PROJECT METRICS

5.8.1 BASELINES

Project baselines will be snapped in the project at two predefined points. The first is creation of the project plan. The second is upon approval of the project plan. If changes to the project are substantial or significantly change project scope, the project can be re-baselined. This will be managed through the change control process in section 5.5 Change Control.

5.8.2 KEY PERFORMANCE INDICATORS

5.8.2.1 SCHEDULE PERFORMANCE INDEX

The primary KPI utilized in the project is SPI. An acceptable range for SPI is between 0.9 and 1.3. SPI indications outside of this threshold will result in schedule analysis, and potential changes. Project progress will be based on physical percent complete of the activity.

5.8.2.2 COMMUNICATION

At each status milestone committee members will be asked for their impression on project status. If the committee members and PM are in alignment, communication will be deemed effective. If there appears to be a gap between the PM and one or more of the committee members the communication plan will be reassessed with the individual to gain alignment.

5.8.2.3 PROGRESS PERFORMANCE MILESTONE (PPM) GRADES

Each PPM submission will be reviewed by the Project Advisor within 5 days of submission. The PPM grades above 90% are considered acceptable. PPM grades 80-90% will require a conversation with the Project Advisor and applicable committee members. PPM grades below 79% will require a key stakeholder meeting to discuss the method and timeline to bring the project back in compliance.

5.8.2.4 KPI STATUS TRACKING

At each milestone indicated for the above KPI's, the result and any required actions will be recorded in a KPI Status Log. This log will, at a minimum, include the KPI being measured, outcome/status of the KPI, an indicator (Green, Yellow, Red) based on defined thresholds, and any actions required based on the KPI status.

KPI Status Tracking

Project Title:	DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL & GAS INDUSTRY	Date Prepared:	December 4, 2015

Date	KPI	Status	Indicator (G-Y-R)	Narrative (Action Required, Effects, etc.)
9/17/2015	SPI	0.19	R	Utilizing Change Control Process, update project plan and rebaseline.
9/18/2015	SPI	0.96	G	After rebaseline, project is on track both for completion date and SPI is within acceptable thresholds.
9/18/2015	Communtication	Aligned	G	Project Advisor and Project Sponsor are in alignment with understanding of current status of project.
9/23/2015	PPM Grade	99%	G	No action required.
10/9/2015	SPI	0.89	Y	SPI is outside of acceptable range, schedule evaluated. Crashing is an option, discussion on 10/9/15 with project advisor.
10/9/2015	Communtication	Aligned	G	Project Advisor and Project Sponsor are in alignment with understanding of current status of project and needed crashing efforts.
11/5/2015	PPM Grade	100%	G	No action required.
11/20/2015	SPI	1.00	G	1.0 after deliverables turned in.
9/18/2015	Communtication	Aligned	G	Project Advisor and Project Sponsor are in alignment with understanding of current status of project.
9/25/2015	PPM Grade	Go	G	No grade received for PPM 4, go status communicated

Figure 6: KPI Status Tracking

5.9 QUALITY CONTROL

5.9.1 CUSTOMER SATISFACTION

Customer satisfaction will be indicated by acceptance of deliverable 03-FWK Multi-Year Development Framework by the Project Sponsor. The Project Manager and Project Sponsor will discuss project status, expectations, and applicable change orders at intervals defined in 5.9.2 Communication Matrix.

5.9.2 Tools and Techniques

The project will utilize Microsoft Project for all planning, scheduling, and monitoring tasks. Microsoft WBS Chart Pro will be utilized for the creation and update of the project work break down structure. Microsoft Office Suite, including Power Point and Visio, will be utilized for all other project activities.

5.9.3 Project/Product Deliverable Presentation

The Project Manager will prepare and deliver a presentation at the end of both the Planning Phase and the Execution Phase. The Planning Phase presentation will include project objectives, an overview of the project charter and project management plans, and a description of the project deliverables. The Execution Phase presentation details will be clearly defined during the execution phase, and will include a project overview, product overview, and key lessons learned.

6.0 Project Close

6.1 MSPM Administrative Close

Both hard and electronic copies of deliverable 02-FPR: Final Project Report, appendices, lessons learned, knowledge area mastery documentation, and PowerPoint presentation will be delivered to the MSPM Department. Once the final presentation is complete the project is closed.

6.2 Product Handoff

Deliverable 03-FWK: Multi-Year Development Framework with all supporting documentation and research will be submitted to the Project Sponsor for final approval. Upon submittal of these documents the product will be considered complete, thereby concluding the project manager's involvement with the product.

6.3 Lessons Learned

Lessons learned will be included in deliverable 02-FPR.

Lessons learned will be collected throughout the life of the project and documented in the Lessons Learned Log. Lessons Learned Template is included as Figure 11 in Appendix C: Forms. Lessons learned will include successfully executed opportunities.

During project closeout a survey will be provided to key stakeholders utilizing a 1-10 scale inquiring on the effectiveness of project communication and if the project outcome addressed their expectations. A ranking of 7 or lower will result in an interview with the stakeholder identifying their concerns, which will be documented in the project lessons learned.

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APPENDIX A: WORK BREAKDOWN STRUCTURE

Figure 7: WBS - Planning Phase

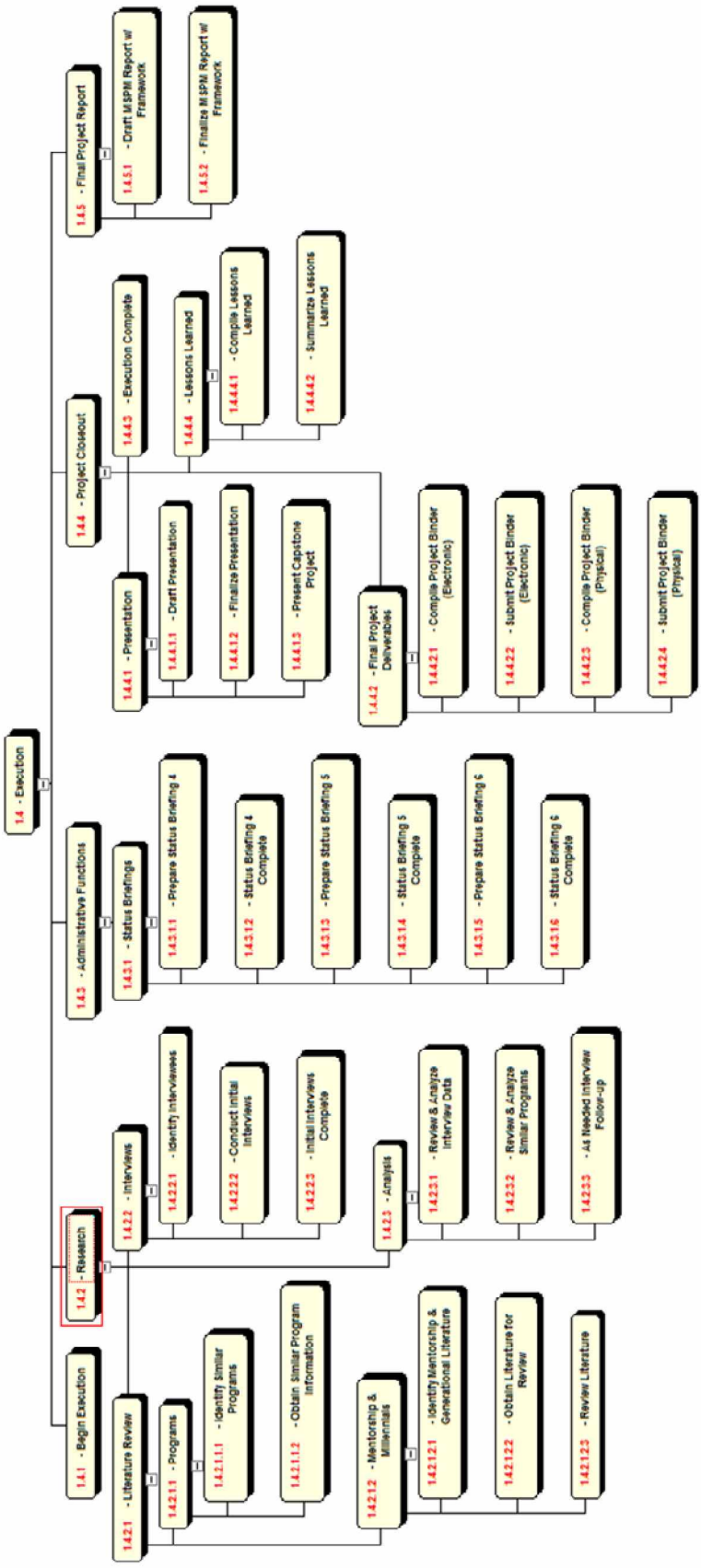
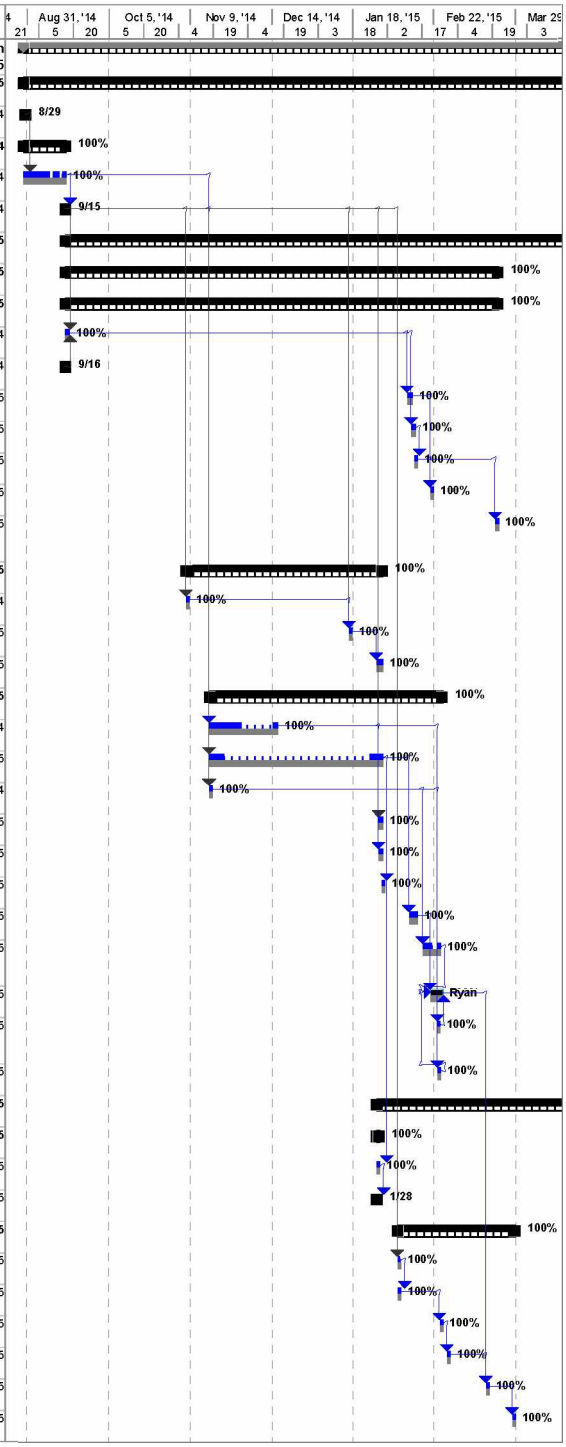


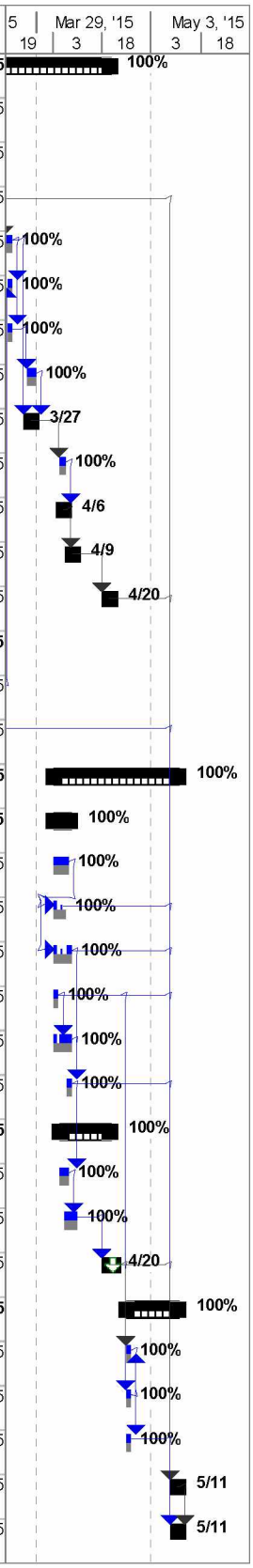
Figure 8: WBS - Execution Phase

APPENDIX B: PROJECT SCHEDULE

ID	WBS	Task Name	% Complete	Work	Start	Finish
0	0	Capstone Schedule - new original baseline	100%	367.35 hrs	Fri 8/29/14	Mon 12/7/15
1	1	Capstone Project	100%	367.35 hrs	Fri 8/29/14	Mon 12/7/15
2	1.1	Start	100%	0 hrs	Fri 8/29/14	Fri 8/29/14
3	1.2	Initial Feasibility Review	100%	0 hrs	Fri 8/29/14	Mon 9/15/14
4	1.2.1	Feasibility Schedule	100%	0 hrs	Fri 8/29/14	Mon 9/15/14
5	1.2.2	Go/No Go Fall 2014 Decision	100%	0 hrs	Mon 9/15/14	Mon 9/15/14
6	1.3	Planning	100%	162.32 hrs	Tue 9/16/14	Mon 5/11/15
7	1.3.1	Initial Planning	100%	92 hrs	Tue 9/16/14	Fri 3/20/15
8	1.3.1.1	Committee	100%	9 hrs	Tue 9/16/14	Fri 3/20/15
9	1.3.1.1.1	Identify Committee Members	100%	3 hrs	Tue 9/16/14	Wed 9/17/14
13	1.3.1.1.5	Begin Planning Phase	100%	0 hrs	Tue 9/16/14	Tue 9/16/14
14	1.3.1.1.6	Obtain Committee Member Contract Signatures	100%	4 hrs	Tue 2/10/15	Wed 2/11/15
10	1.3.1.1.2	Compile Petition for Outside of MSPM Committee Member	100%	2 hrs	Thu 2/12/15	Thu 2/12/15
11	1.3.1.1.3	Submit Petition for Outside of MSPM Committee Member	100%	0 hrs	Fri 2/13/15	Fri 2/13/15
15	1.3.1.1.7	Student/Advisory Committee Contract	100%	0 hrs	Fri 2/20/15	Fri 2/20/15
12	1.3.1.1.4	Petition for Outside of MSPM Committee Member Approved	100%	0 hrs	Fri 3/20/15	Fri 3/20/15
16	1.3.1.2	Sponsorship	100%	8 hrs	Fri 11/7/14	Thu 1/29/15
17	1.3.1.2.1	Draft Sponsorship Letter Example	100%	2 hrs	Fri 11/7/14	Fri 11/7/14
18	1.3.1.2.2	Identify Primary Sponsor	100%	2 hrs	Fri 1/16/15	Fri 1/16/15
19	1.3.1.2.3	Obtain Primary Letter of Sponsorship	100%	4 hrs	Wed 1/28/15	Thu 1/29/15
20	1.3.1.3	Draft PMP	100%	75 hrs	Mon 11/17/14	Tue 2/24/15
23	1.3.1.3.3	Create Draft Project Schedule	100%	25 hrs	Mon 11/17/14	Mon 12/15/14
25	1.3.1.3.5	Created Draft Project Charter	100%	5 hrs	Mon 11/17/14	Thu 1/29/15
26	1.3.1.3.6	Create Draft Stakeholder Analysis	100%	4 hrs	Mon 11/17/14	Mon 11/17/14
22	1.3.1.3.2	Create Project Abstract	100%	2 hrs	Thu 1/29/15	Thu 1/29/15
24	1.3.1.3.4	Build Draft WBS	100%	2 hrs	Thu 1/29/15	Thu 1/29/15
21	1.3.1.3.1	Identify & Document Primary PM Focus Areas	100%	2 hrs	Fri 1/30/15	Fri 1/30/15
31	1.3.1.3.1	Draft Scope Statement	100%	5 hrs	Wed 2/11/15	Fri 2/13/15
27	1.3.1.3.7	Draft Communications Management & Stakeholder Management Plans	100%	4 hrs	Tue 2/17/15	Mon 2/23/15
30	1.3.1.3.1	Compile Draft PMP	100%	22 hrs	Fri 2/20/15	Tue 2/24/15
28	1.3.1.3.8	Define KPIs and Draft Project Controls Management Plan	100%	1 hr	Mon 2/23/15	Mon 2/23/15
29	1.3.1.3.9	Draft Initial Risk Register & Risk Management Plan	100%	3 hrs	Mon 2/23/15	Mon 2/23/15
50	1.3.3	Planning Administrative Tasks	100%	34.22 hrs	Wed 1/28/15	Mon 4/20/15
64	1.3.3.2	GSP	100%	2 hrs	Wed 1/28/15	Wed 1/28/15
65	1.3.3.2.1	Create GSP	100%	2 hrs	Wed 1/28/15	Wed 1/28/15
66	1.3.3.2.2	GSP Submitted	100%	0 hrs	Wed 1/28/15	Wed 1/28/15
70	1.3.3.4	Planning Stage Status Briefings	100%	5 hrs	Fri 2/6/15	Fri 3/27/15
71	1.3.3.4.1	Prepare Status Briefing 1	100%	1 hr	Fri 2/6/15	Fri 2/6/15
72	1.3.3.4.2	Status Briefing 1 Complete	100%	0 hrs	Fri 2/6/15	Fri 2/6/15
73	1.3.3.4.3	Prepare Status Briefing 2	100%	2 hrs	Tue 2/24/15	Tue 2/24/15
74	1.3.3.4.4	Status Briefing 2 Complete	100%	0 hrs	Fri 2/27/15	Fri 2/27/15
75	1.3.3.4.5	Prepare Status Briefing 3	100%	2 hrs	Mon 3/16/15	Mon 3/16/15
76	1.3.3.4.6	Status Briefing 3 Complete	100%	0 hrs	Fri 3/27/15	Fri 3/27/15



ID	WBS	Task Name	% Complete	Work	Start	Finish
51	**1.3.3.1**	**IRB**	**100%**	**15.22 hrs**	**Thu 2/12/15**	**Mon 4/20/15**
52	1.3.3.1.1	Establish IRB Account	100%	2 hrs	Thu 2/12/15	Thu 2/12/15
62	1.3.3.1.1	Complete IRB Training	100%	5 hrs	Thu 2/12/15	Mon 2/23/15
63	1.3.3.1.1	IRB Training Complete	100%	0 hrs	Mon 2/23/15	Mon 2/23/15
53	1.3.3.1.2	IRB Submission Drafted	100%	4 hrs	Thu 3/19/15	Fri 3/20/15
54	1.3.3.1.3	Draft Interview Questions	100%	2 hrs	Fri 3/20/15	Fri 3/20/15
55	1.3.3.1.4	IRB Submitted for MSPM Review	100%	0 hrs	Fri 3/20/15	Fri 3/20/15
56	1.3.3.1.5	IRB Submission Finalized	100%	0.22 hrs	Thu 3/26/15	Fri 3/27/15
61	1.3.3.1.1	IRB Submitted	100%	0 hrs	Fri 3/27/15	Fri 3/27/15
57	1.3.3.1.6	IRB Revised	100%	2 hrs	Sun 4/5/15	Sun 4/5/15
58	1.3.3.1.7	IRB Resubmitted	100%	0 hrs	Mon 4/6/15	Mon 4/6/15
59	1.3.3.1.8	IRB Resubmitted Again	100%	0 hrs	Thu 4/9/15	Thu 4/9/15
60	1.3.3.1.9	IRB Approved	100%	0 hrs	Mon 4/20/15	Mon 4/20/15
67	**1.3.3.3**	**Research**	**100%**	**12 hrs**	**Thu 2/12/15**	**Fri 2/20/15**
68	1.3.3.3.1	Identify Preliminary Research Methods	100%	10 hrs	Thu 2/12/15	Fri 2/20/15
69	1.3.3.3.2	Identify Research Sources & Key Words	100%	2 hrs	Thu 2/12/15	Fri 2/20/15
32	**1.3.2**	**Final Planning**	**100%**	**36.1 hrs**	**Fri 4/3/15**	**Mon 5/11/15**
37	**1.3.2.2**	**Finalize PMP**	**100%**	**20.1 hrs**	**Fri 4/3/15**	**Tue 4/7/15**
38	1.3.2.2.1	Finalize WBS and Schedule	100%	8 hrs	Fri 4/3/15	Mon 4/6/15
39	1.3.2.2.2	Finalize Draft of Project Cha	100%	0.5 hrs	Fri 4/3/15	Sun 4/5/15
40	1.3.2.2.3	Finalize Draft PMP	100%	3.2 hrs	Fri 4/3/15	Tue 4/7/15
41	1.3.2.2.4	Finalize Draft of Abstract	100%	2 hrs	Fri 4/3/15	Fri 4/3/15
42	1.3.2.2.5	Compile PMP Appendices	100%	6.4 hrs	Fri 4/3/15	Tue 4/7/15
43	1.3.2.2.6	PMP Complete	100%	0 hrs	Tue 4/7/15	Tue 4/7/15
33	**1.3.2.1**	**Project Plan Presentation**	**100%**	**12 hrs**	**Sun 4/5/15**	**Mon 4/20/15**
34	1.3.2.1.1	Draft Planning Stage Presentation	100%	4 hrs	Sun 4/5/15	Mon 4/6/15
35	1.3.2.1.2	Finalize Planning Stage Presentation	100%	8 hrs	Mon 4/6/15	Thu 4/9/15
36	1.3.2.1.3	Present on Planning Stage	100%	0 hrs	Mon 4/20/15	Mon 4/20/15
44	**1.3.2.3**	**Planning Stage Binder**	**100%**	**4 hrs**	**Sat 4/25/15**	**Mon 5/11/15**
45	1.3.2.3.1	Compile Planning Binder (Electronic)	100%	2 hrs	Sat 4/25/15	Sat 4/25/15
46	1.3.2.3.2	Compile Planning Stage Lessons Learned	100%	2 hrs	Sat 4/25/15	Sat 4/25/15
48	1.3.2.3.4	Submit Planning Binder (Electronic)	100%	0 hrs	Sat 4/25/15	Sat 4/25/15
47	1.3.2.3.3	Project Plan Approved	100%	0 hrs	Mon 5/11/15	Mon 5/11/15
49	1.3.2.3.5	Planning Stage Complete	100%	0 hrs	Mon 5/11/15	Mon 5/11/15



ID	WBS	Task Name	% Complete	Work	Start	Finish
77	**1.4**	**Execution**	**100%**	**205.03 hrs**	**Fri 9/4/15**	**Mon 12/7/15**
78	1.4.1	Begin Execution	100%	0 hrs	Fri 9/4/15	Fri 9/4/15
79	**1.4.2**	**Research**	**100%**	**109 hrs**	**Fri 9/4/15**	**Tue 11/3/15**
88	**1.4.2.2**	**Interviews**	**100%**	**29 hrs**	**Fri 9/4/15**	**Wed 9/16/15**
89	1.4.2.2.1	Identify Interview ees	100%	11 hrs	Fri 9/4/15	Tue 9/15/15
90	1.4.2.2.2	Conduct Initial Interview s	100%	18 hrs	Tue 9/8/15	Wed 9/16/15
91	1.4.2.2.3	Initial Interview s Complete	100%	0 hrs	Wed 9/16/15	Wed 9/16/15
80	**1.4.2.1**	**Literature Review**	**100%**	**66 hrs**	**Mon 9/7/15**	**Sun 10/11/15**
81	**1.4.2.1.1**	**Programs**	**100%**	**8 hrs**	**Mon 9/7/15**	**Thu 9/10/15**
82	1.4.2.1.1	Identify Similar Programs	100%	2 hrs	Mon 9/7/15	Mon 9/7/15
83	1.4.2.1.1	Obtain Similar Program Information	100%	6 hrs	Tue 9/8/15	Thu 9/10/15
84	**1.4.2.1.2**	**Mentorship & Millennials**	**100%**	**58 hrs**	**Mon 9/14/15**	**Sun 10/11/15**
85	1.4.2.1.2	Identify Mentorship & Generational Literature	100%	4 hrs	Mon 9/14/15	Tue 9/15/15
86	1.4.2.1.2	Obtain Literature for Review	100%	4 hrs	Wed 9/16/15	Thu 9/17/15
87	1.4.2.1.2	Review Literature	100%	50 hrs	Thu 9/17/15	Sun 10/11/15
92	**1.4.2.3**	**Analysis**	**100%**	**14 hrs**	**Wed 10/7/15**	**Tue 11/3/15**
94	1.4.2.3.2	Review & Analyze Similar Programs	100%	4 hrs	Wed 10/7/15	Thu 10/8/15
93	1.4.2.3.1	Review & Analyze Interview Data	100%	4 hrs	Thu 10/8/15	Fri 10/9/15
95	1.4.2.3.3	As Needed Interview Follow-up	100%	6 hrs	Sun 11/1/15	Tue 11/3/15
96	**1.4.3**	**Administrative Functions**	**100%**	**6 hrs**	**Fri 9/4/15**	**Fri 10/23/15**
97	**1.4.3.1**	**Status Briefings**	**100%**	**6 hrs**	**Fri 9/4/15**	**Fri 10/23/15**
98	1.4.3.1.1	Prepare Status Briefing 4	100%	2 hrs	Fri 9/4/15	Fri 9/4/15
99	1.4.3.1.2	Status Briefing 4 Complete	100%	0 hrs	Fri 9/4/15	Tue 9/15/15
100	1.4.3.1.3	Prepare Status Briefing 5	100%	2 hrs	Sun 10/11/15	Sun 10/11/15
101	1.4.3.1.4	Status Briefing 5 Complete	100%	0 hrs	Fri 10/16/15	Fri 10/16/15
102	1.4.3.1.5	Prepare Status Briefing 6	100%	2 hrs	Thu 10/22/15	Thu 10/22/15
103	1.4.3.1.6	Status Briefing 6 Complete	100%	0 hrs	Fri 10/23/15	Fri 10/23/15
118	**1.4.5**	**Final Project Report**	**100%**	**60.03 hrs**	**Wed 10/7/15**	**Fri 11/20/15**
119	1.4.5.1	Draft MSPM Report w / Framew ork	100%	32.03 hrs	Wed 10/7/15	Fri 11/6/15
120	1.4.5.2	Finalize MSPM Report w / Framew ork	100%	28 hrs	Sat 11/7/15	Fri 11/20/15
104	**1.4.4**	**Project Closeout**	**100%**	**30 hrs**	**Thu 11/19/15**	**Mon 12/7/15**
105	**1.4.4.1**	**Presentation**	**100%**	**10 hrs**	**Thu 11/19/15**	**Tue 12/1/15**
106	1.4.4.1.1	Draft Presentation	100%	4 hrs	Thu 11/19/15	Fri 11/20/15
107	1.4.4.1.2	Finalize Presentation	100%	4 hrs	Sat 11/28/15	Sun 11/29/15
108	1.4.4.1.3	Present Capstone Project	100%	2 hrs	Tue 12/1/15	Tue 12/1/15
115	**1.4.4.4**	**Lessons Learned**	**100%**	**8 hrs**	**Thu 11/26/15**	**Thu 12/3/15**
116	1.4.4.4.1	Compile Lessons Learned	100%	4 hrs	Thu 11/26/15	Fri 11/27/15
117	1.4.4.4.2	Summarize Lessons Learned	100%	4 hrs	Wed 12/2/15	Thu 12/3/15
109	**1.4.4.2**	**Final Project Deliverables**	**100%**	**12 hrs**	**Wed 12/2/15**	**Mon 12/7/15**
110	1.4.4.2.1	Compile Project Binder (Electronic)	100%	6 hrs	Wed 12/2/15	Fri 12/4/15
112	1.4.4.2.3	Compile Project Binder (Physical)	100%	6 hrs	Fri 12/4/15	Sun 12/6/15
111	1.4.4.2.2	Submit Project Binder (Electronic)	100%	0 hrs	Mon 12/7/15	Mon 12/7/15
113	1.4.4.2.4	Submit Project Binder (Physical)	100%	0 hrs	Mon 12/7/15	Mon 12/7/15
114	1.4.4.3	Execution Complete	100%	0 hrs	Mon 12/7/15	Mon 12/7/15

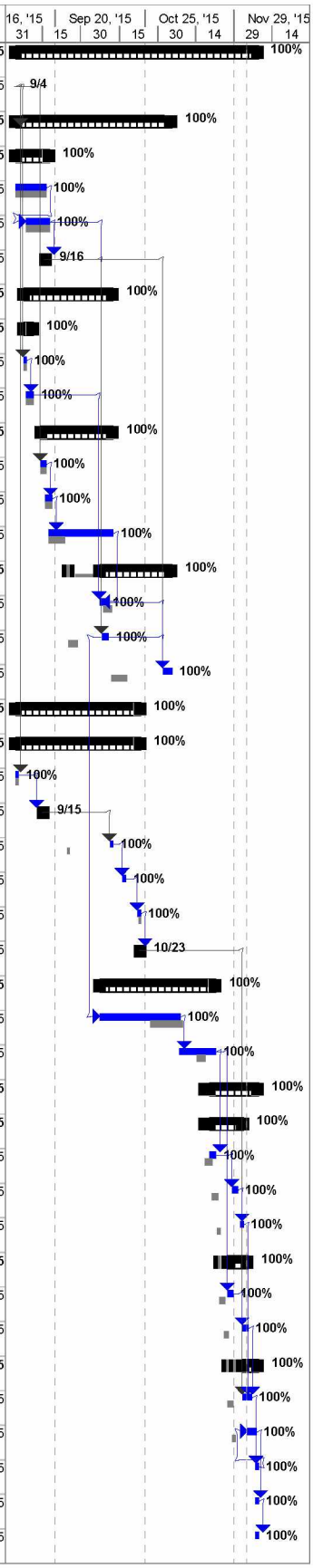


Figure 9: Project Schedule

APPENDIX C: FORMS

CHANGE REQUEST FORM

CHANGE REQUEST

A Framework for a Multi-Year Development Program Targeting High Potential Individuals in the

Project Title: Alaska Oil & Gas Industry **Date Prepared:** XX/XX/201X

Person Requesting Change: R. Loomis **Change Number:** XX

Category of Change:

☐ Scope ☐ Quality ☐ Requirements
☐ Cost ☐ Schedule ☐ Documents

Detailed Description of Proposed Change:

Justification for Proposed Change:

Impacts of Change:

Scope	☐ Increase	☐ Decrease	☐ Modify
Description:			
Quality	☐ Increase	☐ Decrease	☐ Modify
Description:			
Requirements	☐ Increase	☐ Decrease	☐ Modify
Description:			
Cost	☐ Increase	☐ Decrease	☐ Modify
Description:			
Schedule	☐ Increase	☐ Decrease	☐ Modify

Figure 10: Change Request Form

CHANGE REQUEST

Description:
Project Documents

Comments:

Disposition ☐ Approve ☐ Defer ☐ Reject

Justification:

Change Control Board Signatures:

Name	Role	Signature

Date:

CHANGE LOG

Change Log

12/4/2015

Change ID	Category	Description	Submitted By	Submitted Date	Status	Disposition	Other Comments
1	Administrative	Change title from "Guide" to "Framework"	R.Loomis	2/12/2015	Closed	Approved	
2	Scope Reduction	Remove Survey's from Execution Plan	J. Wilson	2/12/2015	Closed	Approved	Survey activities marked inactive in schedule 2/14/15. Survey activities deleted 3/20/15
3	Scope Clarification	Added an internal MSPM review of IRB documents.	L. Piccard	3/19/2015	Closed	Approved	Adds 1 hour of work, consumes remaining float on IRB activities.
4	Scope Addition	Amend scope to include development of individuals new to the industry.	S. Loomis	2/24/2015	Closed	Cancelled	Denied to to schedule impact and departure from the project purpose, as defined in the Project Charter.
5	Scope Reduction	Remove review of confidential retention data.	R.Loomis	9/5/2015	Closed	Approved	Removes activites in section 2.4.2.2, reducing scope by 14 hours. Removes activity 2.4.2.4.2, reducing scope by 6 hours.
6	Execution Change	Remove hitch 10 and 11 from schedule.	R.Loomis	9/17/2015	Closed	Approved	Removed activities 1.13 and 1.14 from schedule. Increases resource availability during those timeframes.
7	Execution Change	Follow-up interviews happen concurrently with framework drafting, opposed to prior to framework drafing. This better reflects project execution plan.	R.Loomis	9/17/2015	Closed	Approved	2.4.2.3.3 successor changed from 2.4.6.2.1 to FF with 2.4.6.2.10
8	Administrative	Past hitches inflating earned hours. Remove from schedule.	R.Loomis	9/17/2015	Closed	Approved	Hitches 1 - 9 removed from schedule. Need to capture in lessons learned.
9	Execution Change	Baseline reset, incorproating above changes.	R.Loomis	9/17/2015	Closed	Approved	SPI reset to 1.0. Had to overwrite original baseline (still captured in separate document) as MS Project SPI calcuations use original baseline and not current baseline. Need to capture in lessons learned as it would alter the execution of schedule managmenet on future projects.
10	Execution Change	Drafting Final Project Report simultaneous to Analysis and Framework.	R.Loomis	10/9/2015	Closed	Approved	Activity 1.4.5.1 is now start to start with 1.4.2.3.1
11	Execution Change	Removal of Literature Review	R.Loomis	11/5/2015	Closed	Rejected	Denied as literature review is an administrative requirement.
12	Administrative	Framework draft activities removed from schedule - these are included in drafting the MSPM report.	R.Loomis	11/6/2015	Closed	Approved	Activities under 1.4.6 removed. Definition for activities 1.4.5.1 and 1.4.5.2 updated to include framework as research results. Work under 1.4.5.2 Finalize Report increased to incorporate this additional clarity.

Figure 11: Change Log

LESSONS LEARNED TEMPLATE

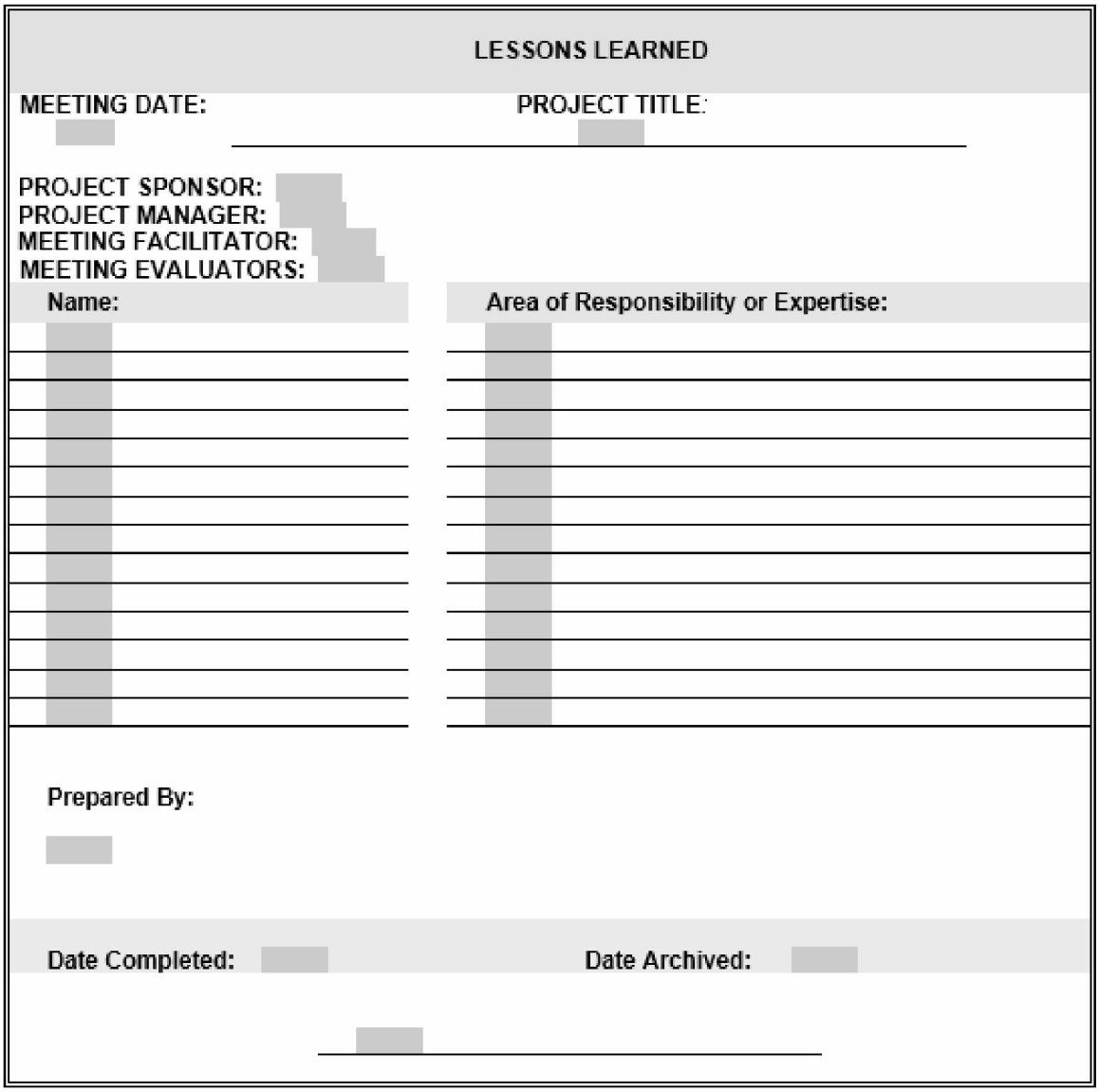


Figure 12: Lessons Learned Template

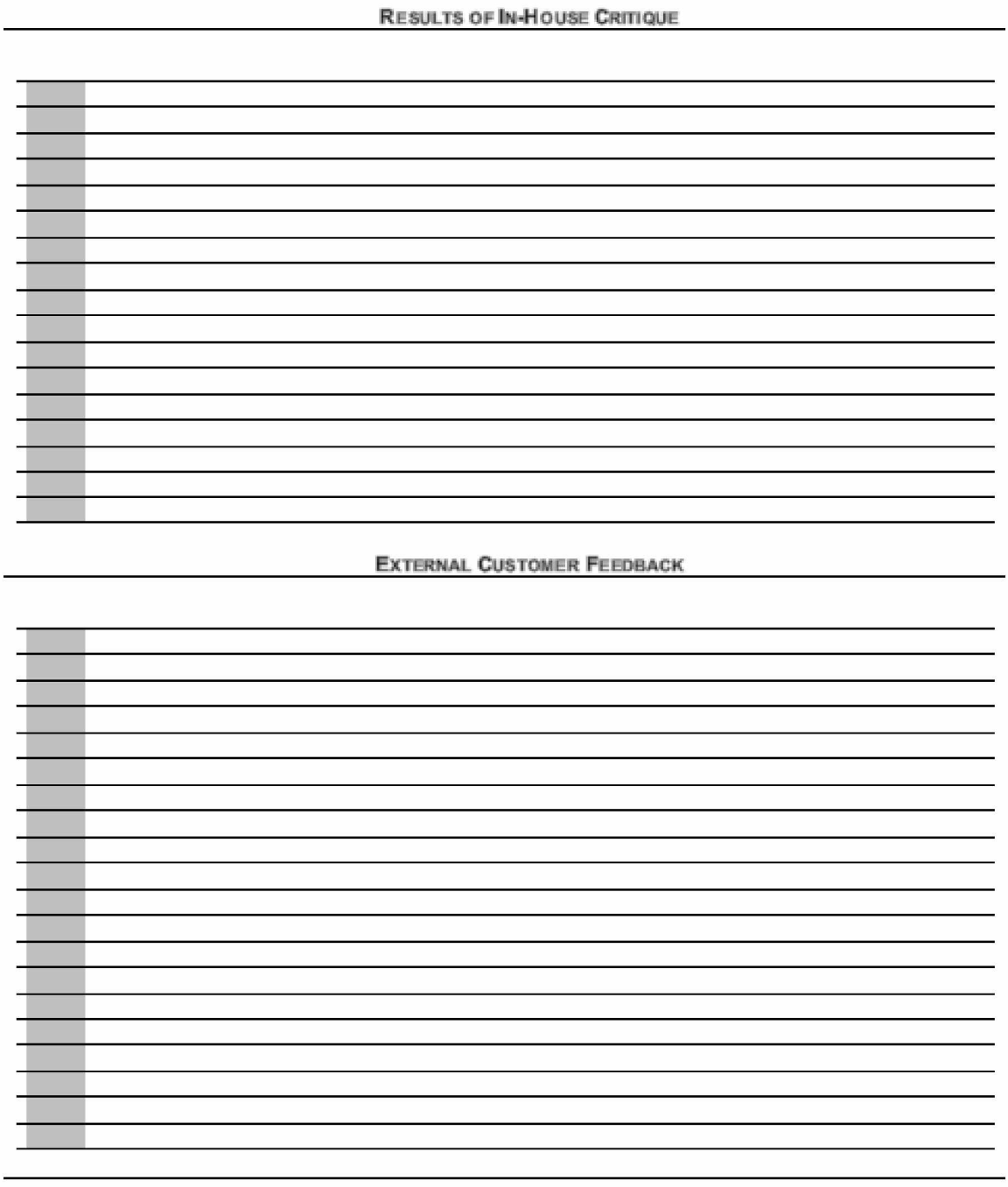


Figure 8: Lessons Learned Template Continued

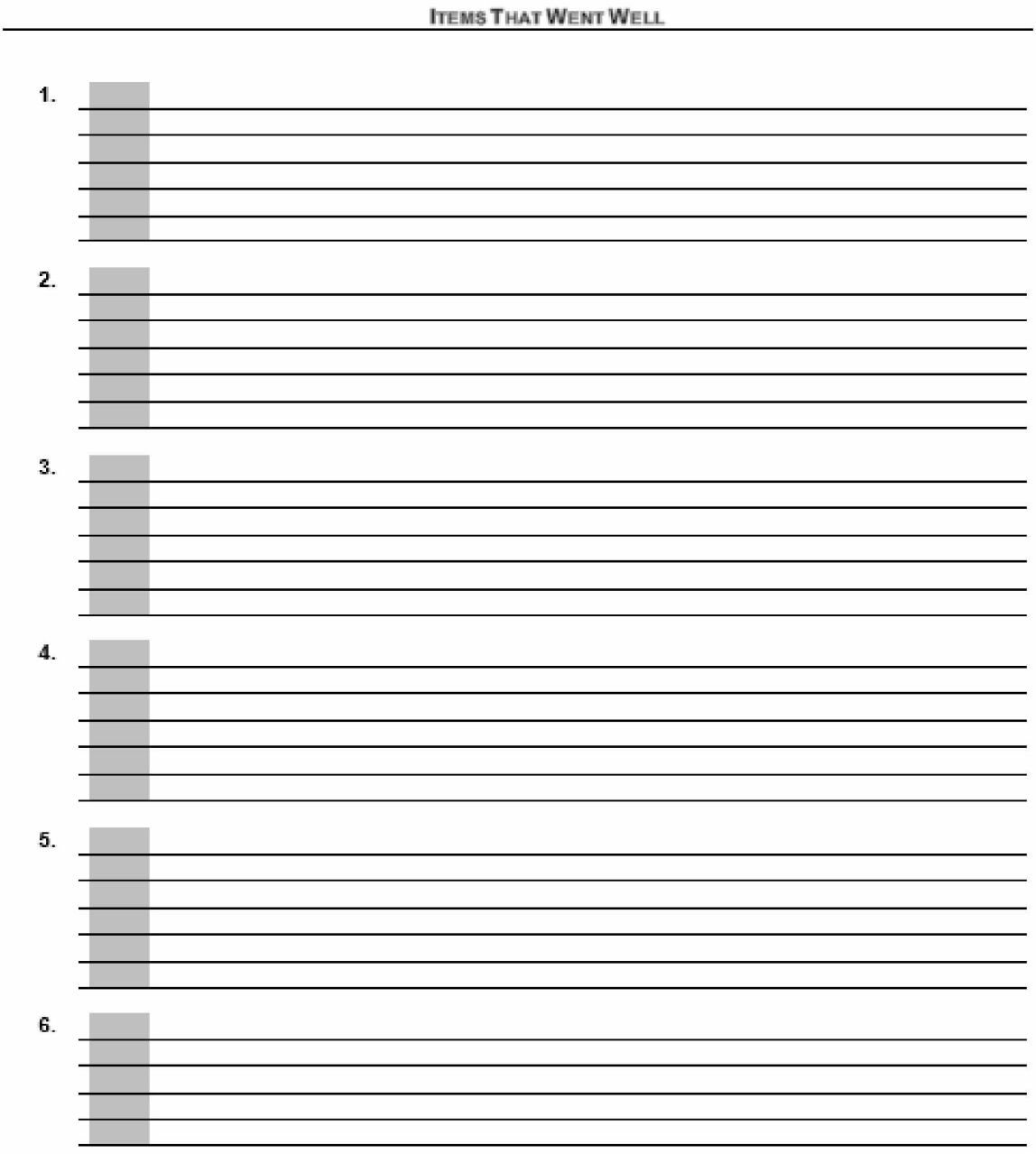


Figure 8: Lessons Learned Template Continued

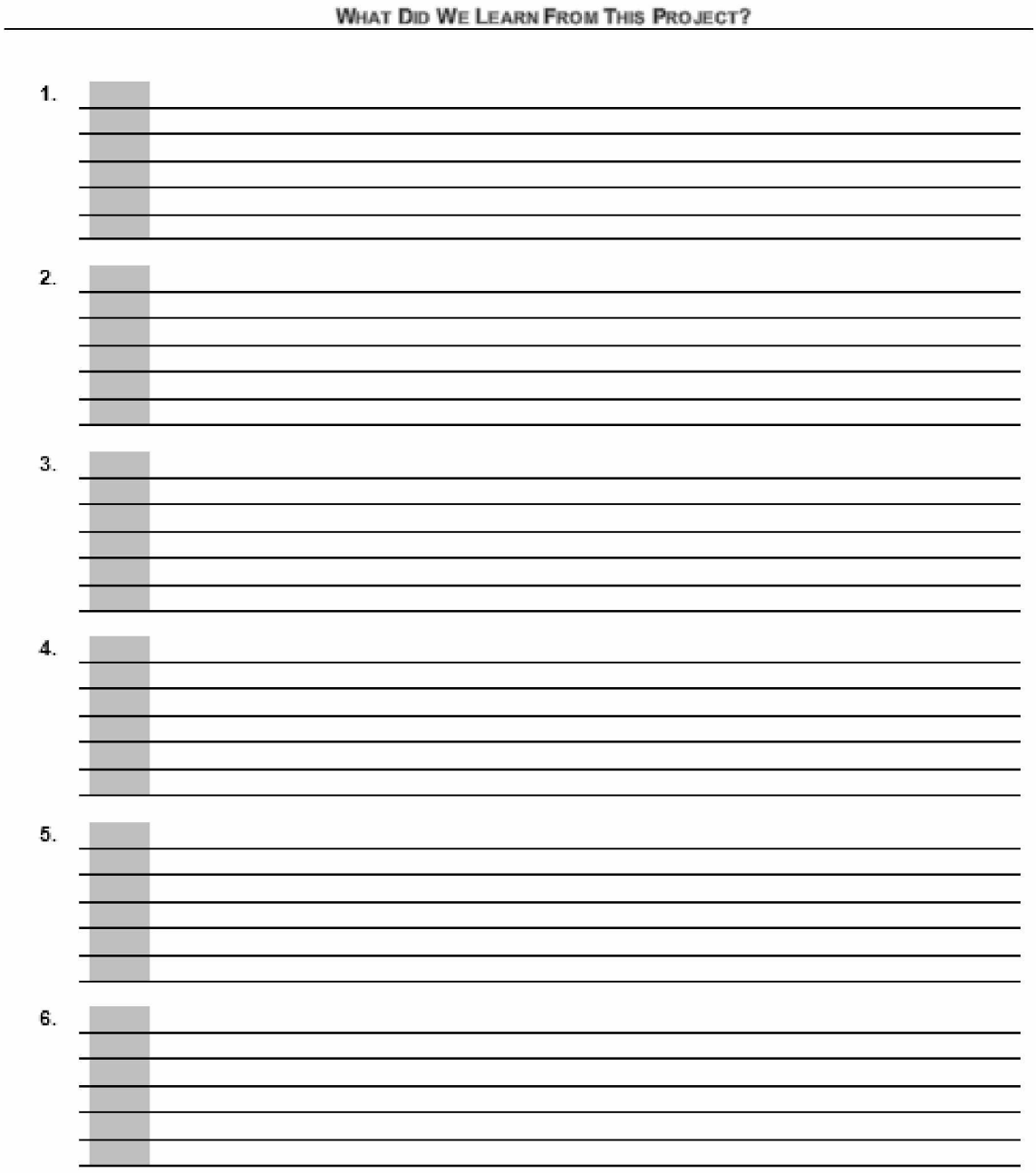


Figure 8: Lessons Learned Template Continued

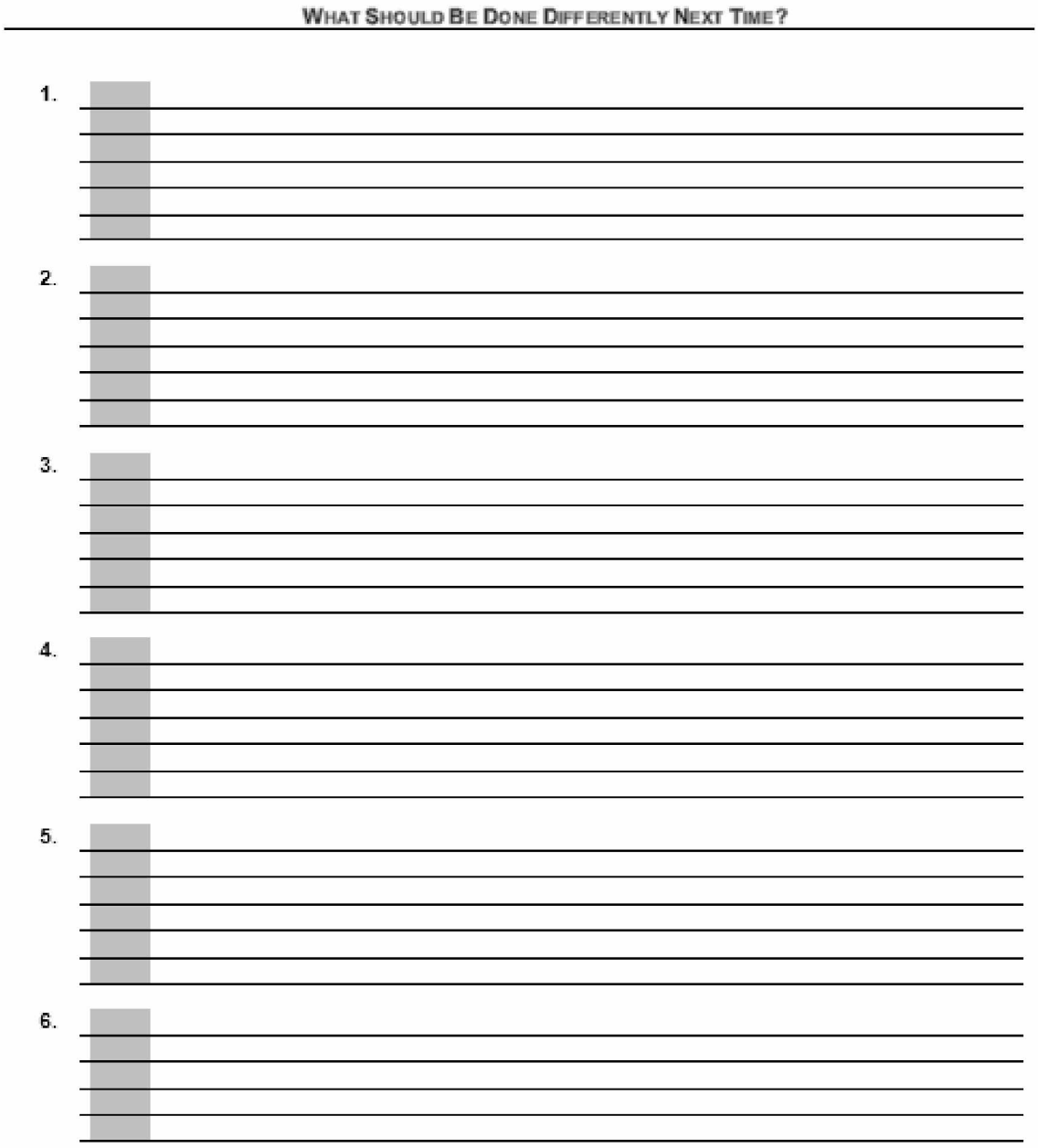


Figure 8: Lessons Learned Template Continued

ACTION ITEMS TO FINALIZE LESSONS LEARNED

1. Item:
   Person Responsible:
   Commitment for Closure:
   Notes:
2. Item:
   Person Responsible:
   Commitment for Closure:
   Notes:
3. Item:
   Person Responsible:
   Commitment for Closure:
   Notes:
4. Item:
   Person Responsible:
   Commitment for Closure:
   Notes:
5. Item:
   Person Responsible:
   Commitment for Closure:
   Notes:
6. Item: How will we celebrate?
   Person Responsible:
   Commitment for Closure:
   Notes:

Figure 8: Lessons Learned Template Continued

Conducting a Lessons Learned Meeting

MCD projects are not complete until a formal Lessons Learned has been performed, and the information is documented and archived. It is vital that all project team members feel that they can openly share the "areas for improvement" as well as "what went well" without any fear of punishment or reprisal.

This information, when properly communicated and recorded by MCD staff, can prove to be extremely valuable for the success of future MCD projects.

A four-step process for conducting these reviews may prove advantageous:

First, prepare and circulate several specific questions about the project and give team members time to think about them and prepare their responses individually. (See examples below.)
Second, hold a Lessons Learned meeting and discuss the team's responses to the questions.

Third, record the Lessons Learned meeting, and send the information out for review/final editing. Have the Project Sponsor and the Project Manager sign off on the final version.

Fourth, archive the information for future reference.

The benefit of the first step (done individually by team members) is that it allows quieter, more analytical people to develop their responses to the questions without being interrupted by the more outgoing, vocal types who might otherwise dominate in an actual meeting. Also, it allows everyone the time to create more thoughtful responses. In summary, it can yield better discussion during the Lessons Learned meeting. Below are some questions that may be appropriate to send out before, and/or ask at your Lessons Learned meeting.

Place a check in the box next to the questions that are appropriate to ask for your specific project.

General Questions

- ☐ Y ☐ N Did we use the MCD checklists to verify deliverables for each Process Group/Phase?
- ☐ Y ☐ N Are you proud of our finished deliverables (project work products)? If yes, what's so good about them? If no, what's wrong with them?
- ☐ What was the single most frustrating part of our project?
- ☐ How would you do things differently next time to avoid this frustration?
- ☐ What was the most gratifying or professionally satisfying part of the project?
- ☐ Which of our methods/processes worked particularly well?
- ☐ Which of our methods/processes were difficult or frustrating to use?
- ☐ If you could wave a magic wand and change anything about the project, what would you change?
- ☐ Y ☐ N Did our stakeholders, senior managers, customers, and sponsor(s) participate effectively? If not, how could we improve their participation?

Figure 8: Lessons Learned Template Continued

Process Group/Phase-Specific Questions

Phase I: Initiating

☐ Y ☐ N Did we hold a project briefing meeting with key prior to beginning work on the deliverables? If so was it successful? ☐ Y ☐ N Explain:

☐ Y ☐ N Was the Project Sponsor, Project Manager, and (as required) SMEs identified, assigned, and given the proper authority in a timely manner? If not, why?

☐ Y ☐ N Were all the key stakeholders identified? If not, why?

☐ Y ☐ N Did our feasibility analysis identify all the project deliverables that we eventually had to build? If not, why?

☐ Y ☐ N Did our feasibility analysis identify unnecessary deliverables? If not, why?

☐ Y ☐ N Did we develop a "High-Level Plan"? Would it have helped? ☐ Y ☐ N
If yes, explain:

☐ Y ☐ N Did our project charter include all the components necessary to prior to the project kickoff meeting (i.e., prior to beginning the Planning phase?)

☐ How could we have improved on the Initiating phase?

Phase II: Planning

☐ Y ☐ N Was our initial scope statement accurate? (i.e. How accurate were our original estimates relating to the size and effort for our project? What did we over or under estimate? Consider deliverables, work effort, materials required, etc. How could we have improved our estimate of size and effort so that it was more accurate?)

☐ Y ☐ N Did we do a comprehensive analysis of ALL customer requirements? If not, why?

☐ Y ☐ N Did we have the right people assigned to the project team? (Consider subject matter expertise, technical contributions, management, review and approval, and other key roles). If no, how can we make sure that we get the right people next time?

☐ Y ☐ N Did we develop the WBS accurately and efficiently? If not, why?

☐ Y ☐ N Did we develop a WBS dictionary? If no, would it have helped?

☐ Y ☐ N Were all the right people assigned to the project core team?

☐ Y ☐ N Did we use MS Project or Scheduling software to its fullest capability? If not, why?

☐ Y ☐ N Did we react accordingly to early warning signs of problems that occurred later in the project? If not, why?

☐ Y ☐ N Could we have completed this project with fewer staff/vendors/contractors? If so, explain:

☐ Y ☐ N Were our assumptions, constraints, limitations, and requirements made clear to all staff/vendors/contractors from the beginning? If not, why?

☐ Y ☐ N Were there any difficulties negotiating the vendor contract? If so, explain:

☐ Y ☐ N Were there any difficulties setting up vendor paperwork (purchase orders, contracts, etc.) or getting the vendor started? If so, explain?

☐ Y ☐ N Were there team members or stakeholders who were missing from the kickoff meeting or who were not involved early enough in our project? If so, why?

☐ Y ☐ N Were all team/stakeholder roles and responsibilities clearly delineated and communicated? If not, why?

☐ Y ☐ N Were the deliverables specifications, milestones, and specific schedule elements/dates clearly communicated? If not, why?

☐ Y ☐ N Was the Project Plan complete? If not, why?

☐ Y ☐ N Should other "sub-plans" (e.g. Budget, Procurement, Quality, Change Control, Communication, Management) have been included? If so, explain:

☐ Y ☐ N Was the final project plan approved by the Project Sponsor? If not, why?

☐ Y ☐ N Did we hold a Kickoff Meeting prior to beginning the Executing Phase?

☐ How could we have improved on the Planning phase?

Figure 8: Lessons Learned Template Continued

Phase 3 and 4. Executing/Controlling:

☐ Y ☐ N Was our implementation strategy for executing the Project Plan accurate and effective? If not, why?
☐ Y ☐ N Were we effective in completing the work packages/tasks? If not, why?
☐ Y ☐ N Was information collected and distributed effectively? If not, why?
☐ Y ☐ N Were we effective in team development? If not, why?
☐ Y ☐ N Were we effective in our quality assurance monitoring? If not, why?
☐ Y ☐ N Were we effective in monitoring scope? If not, why?
☐ Y ☐ N Were our project team meetings productive and efficient? If not, why?
☐ Y ☐ N Were the members of our test audience truly representative of our target audience? If not, how could we assure better representation in the future?
☐ Y ☐ N Did the test facilities, equipment, materials, and support people help to make the test an accurate representation of how the deliverables will be used in the "real world?" If not, how could we have improved on these items?
☐ Y ☐ N Did we get timely, high-quality feedback about how we might improve our deliverables? If not, why?
☐ Y ☐ N Did our hand-off of deliverables to the user/customer/sponsor represent a smooth and easy transition? If not, why?
☐ Y ☐ N Did we monitor project progress, scope, quality, risks, costs, and schedules against the Project Plan? If not, why?
☐ Y ☐ N Did we have and effective change control system (and if applicable, change control board) in place? If not, would that have been beneficial? ☐ Y ☐ N Explain:
☐ Y ☐ N Did we update the Project Plan in a timely manner? In not, why?
☐ How could we have improved on the Executing phase?
☐ How could we have improved on the Controlling phase?

Phase 5. Closing:

☐ Y ☐ N Did we do procurement audits? If not, would they have been beneficial? Explain:
☐ Y ☐ N Did we do a final product verification? If not, why?
☐ Y ☐ N Was there a formal acceptance (sign-off by the customer)? If not, why?
☐ Y ☐ N Did we do a formal Lessons Learned process? If not, why?
☐ Y ☐ N Did we review and update all records (e.g. Project Plan)? If not, why?
☐ Y ☐ N Did we archive all project records? If not, why?
☐ Y ☐ N Did we release project team members in a timely fashion? If not, why?
☐ How could we have improved on the Closing phase?

Figure 8: Lessons Learned Template Continued

APPENDIX D: ABSTRACT

A FRAMEWORK FOR A MULTI-YEAR DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL & GAS INDUSTRY

The Alaska Oil & Gas industry has a limited labor pool which creates a high demand for talented individuals. As a result competition is fierce among the companies in the Alaska's Oil and Gas industry. Furthermore, companies devote considerable resources to recruiting and training talent, only to see individuals leave for a competitor or Alaska altogether; individuals who exhibit potential for leadership are difficult to retain. Individuals with experience in all aspects of Arctic projects, from engineering through operations, are in high demand. Despite this, some of largest employers in Alaska do not have solidified long term programs for developing talent in these areas. There is a need for the contractor companies in Alaska's Oil & Gas industry to develop and implement a plan which would ultimately result in the retention of talented, skilled employees.

This project produced a framework which can be utilized by companies to implement competitive multi-year development programs specific to the unique Alaska Oil & Gas contractor industry. The produced framework focused on job movement with aspects of mentorship and applicable higher education. Through use of the this framework, employees would become highly trained and dedicated to their Alaska Oil & Gas employer as they received high quality and diverse experiences while developing long term relationships with mentors dedicated to the success of the participant and Alaska's economy. The primary outcome of framework implementation would be increased retention of high potential individuals. The desired secondary outcomes would be a more knowledgeable work force and increased cross business collaboration.

APPENDIX E: PROJECT CHARTER

A FRAMEWORK FOR A MULTI-YEAR DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL & GAS INDUSTRY

PROJECT CHARTER

Ryan Loomis

PM 686A - Project Initiation and Planning

MSPM University of Alaska Anchorage

Spring 2015

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Section 1. Project Overview

1.1 Project Description

This document defines this project and details at a high level. This project is being initiated in order to identify and address the issues associated with retaining high potential individuals in the competitive Alaska Oil & Gas Industry. The project manager for this project, Ryan Loomis, has full authority as granted by the sponsor, Josie Wilson, to utilize any time as needed to complete the project

In order to accomplish the project goal of identifying and addressing retention in high potential individuals, the project manager will produce a framework for implementing a multi-year development program. This framework will be made available to all stakeholders.

1.2 Project Scope

This project will produce two deliverables: 1. a project management plan that details exactly how the project will be executed and 2. a framework for implementing a multi-year development program targeting high potential individuals and the Alaska Oil & Gas industry. The framework will include periodic job movements, mentorship best practices, and applicable higher education. The framework will come from analysis of a compilation of sources, including self-conducted literature reviews and interviews with relevant sources. The planning of this project will begin August 29th, 2014 and be completed by December 15th, 2015.

Project Excludes

- This project does not include implementation of the development program.
- This framework will not be tailored to a specific company, resources, or individual.
- This project does not include a training associated with applying or handing off the documentation.
- This project does not include a financial breakdown or cost analysis.
- There will not be a real world test on the effectiveness of the designed program.

1.3 Critical Success Factors

- Deliverables are completed and submitted on time
- Sufficient data is collected to complete the development program execution plan
- Final framework is accepted by the project sponsor

1.4 Assumptions

- The advisory committee will be available review all project documents and PPM's
- All deliverable can be completed by completion of PM686 class series
- The project manager will be the only resource assigned to work packages
- There is no funding associated with this project
- Sufficient data from interviews to support analysis.

1.5 Constraints

	Schedule	Scope	Cost
Fixed	X		
Somewhat Flexible		X	
Flexible			X

1.6 High Level Project Risks

Risk Register

Risk Name	Description of Risk	Likelihood	Impact	Risk Level	Response Type	Owner
External Risks (Conditions outside the control of the project)						
PMP	PMP not approved by Sponsor	Low	High	Low	Mitigate; Check in with sponsor throughout planning process	Sponsor
Research	Lack of available interviewees	Medium	Medium	Medium	Mitigate; early identification and contact of interviewees	PM
PMP, Project Completion	Project Manager has unscheduled work shifts or extended work shifts.	High	High	High	Mitigate; PM to decline optional OT, build slack into schedule by reducing PM resource availability. Discuss with supervisor, clear communication on R&R commitments. Project deadlines are to be incorporated into PM's Outlook calendar.	PM
Internal Risks (Conditions within the control of the project)						
Project Completion	PM Defers	High	Medium	High	Mitigate; Plan PM 686A and 686B a semester apart. Work on deliverables prior to start of semester.	PM
Research	Lack of Data	Medium	High	Medium	Mitigate; determine sources during planning phase. Begin contact of potential sources during planning.	PM

Section 2. Project Authority and Milestones

2.1 Project Oversight Authority

This project will be using an advisory committee consisting of 3 members. The advisory committee will serve as the project oversight authority.

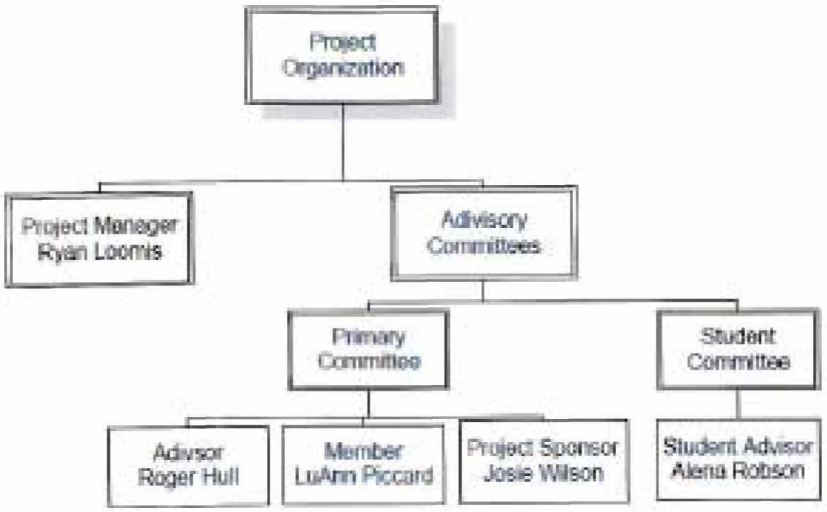
Advisory Committee Members		
Name	Role	Organization
Roger Hull	Primary Advisor	UAA Project Management
LuAnn Piccard	Committee Member	UAA Project Management
Josie Wilson	Committee Member	Training & Leadership Development Manager

2.2 Projected Major Project Milestones

Milestone/Deliverable	Target Date
Project Start	8/29/14
Presentation of PMP	4/20/15
Planning Complete	4/28/15
Framework Complete	11/20/15
Presentation of Project Deliverables	12/15/15
Project Completion	12/15/15

Section 3. Project Organization

3.1 Project Structure



3.2 Roles and Responsibilities

Role	Responsibility
Project Manager	Manage project and complete all deliverables
Project Sponsor	Accept final project deliverables
Primary Advisory Committee	Advise project manager during all phases of project
Student Committee	Provide as needed review and guidance

3.3 Responsibility Matrix

Major Milestone	Project Manager	Project Sponsor	Primary Advisor: Hull	Committee Member: Piccard	Committee Member: Wilson
PPM 1	R	C	A	C	C
PPM 2	R		A	C	C
PPM 3	R		A	C	C
PPM 4	R		A	C	C
Presentation of PMP	R	C	A	I	I
Project Execution: Phase 1	R		A	C	C
Project Execution: Phase 2	R		A	C	C
Project Execution: Phase 3	R		A	C	C
Project Execution: Phase 4	R		A	C	C
Final Presentation of Deliverables	R	C	A	I	I
Project Closeout	R	C	A	I	I

R=Responsible A=Approve C= Consult I= Inform

Section 4. Points of Contact

Role	Name / Organization	Phone	Email
Project Manager	Ryan Loomis	(425) 344-9684	Ryan.Loomis@hotmail.com
Primary Committee Advisor	Roger Hull / UAA Faculty	(907) 786-1923	RKHull@uaa.alaska.edu
Project Sponsor & Committee Member	Josie Wilson / CH2M HILL	(907) 230-8179	Josie.Wilson@ch2m.com
Committee Member	LuAnn Piccard / UAA Faculty	(907) 786-1917	LPiccard@uaa.alaska.edu

Section 5. Project Acceptance

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
Ryan Loomis	Project Manager	Ryan Loomis	4/6/15
Josie Wilson	Project Sponsor	Josie Wilson	4/6/2015

Section 6. Revision History

Version	Date	Name	Description
0.0	11/17/14	Ryan Loomis, Project Manager	Project Charter Creation
1.0	1/30/15	Ryan Loomis, Project Manager	Project Charter Draft
2.0	4/3/15	Ryan Loomis, Project Manager	Project Charter Finalized

APPENDIX F: SPONSOR LETTER

CH2M HILL 949 E. 36th Ave Anchorage, AK 99508

University of Alaska Anchorage
Project Management Department (MSPM)
3211 Providence Drive
Anchorage, AK 99508

January 28, 2015

Dear Ms. Piccard,

It is my sincere pleasure to support Ryan Loomis with his MSPM project. Please accept this letter as our approval for his project developing high performing employees who exhibit potential for leadership (high potential) in the Oil and Gas industry in Alaska at CH2M HILL.

CH2M HILL is the second largest employer in the State of Alaska for the oil and gas industry. This market leadership position with over 2,600 employees includes the opportunity to equip and develop the current top performing talent in the company for future managerial positions. Therefore, Mr. Loomis' project will be of considerable value to the training and development department called CH2M HILL University. We are enthusiastic for the potential outcomes of the project including employee recruitment, retention, morale, and engagement.

Thank you for all your efforts and for providing an educational environment in which local firms can benefit from the outcomes of these projects. We appreciate you and this program at the University of Alaska Anchorage.

I look forward to supporting Mr. Loomis in this endeavor and am available to address any questions or additional support I can provide.

Sincerely,

Josie Wilson

Josie Wilson, MBA
Regional Training & Leadership Development Manager – Alaska and Russia
Direct Dial-907-762-1282
Mobile Phone- 907-230-8179
Josie.Wilson@ch2m.com

APPENDIX G: PRODUCT DESCRIPTION

A FRAMEWORK FOR A MULTI-YEAR DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL & GAS INDUSTRY

PRODUCT DESCRIPTION

This product of this project is a framework for a multi-year development program. There are three key components to this product.

- The Framework: This will be a document summarizing the research results and providing a recommended application of the research. This recommendation will cover the components deemed necessary for a multi-year development program in the Alaska Oil & Gas industry. It will be built in a way which can be easily tailored to a specific organization or individual.
- One Pager: A one page diagram mirroring an existing program will be developed for easy communication of program components and flow.
- Example Application: An example application of the framework will be provided for a specific engineering discipline.

In addition to the product the final project report will be made available to the Project Sponsor.

Approvals:

Ryan Loomis 4/6/15		Josie Wilson 4/6/2015	
Ryan Loomis, PMP	Date	Josie Wilson	Date
Project Manager		Project Sponsor	

APPENDIX H: STATUS REPORTS

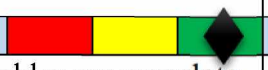
Project Status Report Dashboard #1 – 9/18/14

Synopsis of Project	Progress Since Last Report
What it's about and what it will deliver? To address retention, succession planning, expert knowledge-sharing, cross-business collaboration this project will create an execution plan for a long term development program targeting high potential individuals. Key aspects of the program are a rotational work schedule (three locations/roles over 4-5 years), mentorship, and continuing education.	*Key tasks completed and key tasks started.* Tasks Completed Feasibility Schedule 2nd Committee Spot filled Tasks Started 3rd Committee Spot Outreach
Current Status	**Forecast**
Where am I now? Am I on track to meet next PPM deliverables? Currently not on track to meet Fall 2014 PPM deliverable schedule. Currently on track to meet "soft" milestones as determined by the Feasibility Schedule	*Is project tracking to next PPM and beyond towards project completion? (Big picture view)* Initial Feasibility Schedule indicates meeting PPM4 Spring Deadline is achievable. To do so "soft" milestones for PPM1-3 will be utilized off schedule from the UAA curriculum.
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. Recent change in work schedule - Working 14hr/day seven days a week on slope & 8-10hr/day five-six days a week in town through early November. Response – defer to spring semester utilizing Feasibility schedule (I *should* have four R&R's before spring PPM4 deadline)	*Wrap up with key items and where help needed from stakeholders.* Left slope on Wednesday and now working in town – goal per Feasibility schedule is a strong start on PPM1 deliverables & to identify a 3rd committee member.

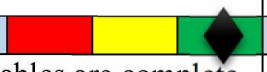
Project Status Report Dashboard #2 – 2/6/15

Synopsis of Project	**Progress Since Last Report**
This project will produce a guide which can be utilized by companies to implement competitive long term development programs specific to the unique Alaska Oil & Gas industry. Key aspects of the project are a rotational work schedule (three locations/roles over 4-5 years), mentorship, and continuing education. The primary outcome will be increased retention of high potential individuals. The desired secondary outcome is a more knowledgeable work force and increased cross business collaboration.	PPM 1 Deliverables, including Project Charter and draft schedule through execution. Sponsorship letter obtained, and committee members identified.
Current Status 	**Forecast**
Just got off slope this week, on track to complete PPM 2 and PPM3 deliverables in the next three weeks. Initial meetings scheduled with all committee members to review project.	I have a tight schedule to complete the project by the end of Fall Semester, 2015. Currently looking at R&R's and current career coverage to ensure adequate time for the MSPM Capstone project. No concerns on meeting PM 686A deadlines.
Anticipated Changes/Key Risks/Corrective Actions	**Key Takeaways/Where Help Needed**
Key risk is lack of availability to work on the project. I have been declining optional off rotation work opportunities and actively communicating my MSPM requirements to limit required off rotational work.	*Continuing to work on deliverables after deferral last semester was critical to initial success this semester. Keeping focused on R&Rs is mandatory to meet the major milestones and allow for final completion in Fall.* *Need feedback on project charter and schedule from all committee members.*

Project Status Report Dashboard #3 – 2/24/15

Synopsis of Project	**Progress Since Last Report**
This project will produce a framework which can be utilized by companies to implement competitive multi-year development programs specific to the unique Alaska Oil & Gas industry. Key aspects of the framework are job rotational every 18-24 months, mentorship best practices, and applicable higher education. The primary outcome will be increased retention of high potential individuals. The desired secondary outcome is a more knowledgeable work force and increased cross business collaboration.	All PPM 2 Deliverables. Draft PMP, IRB Training complete. IRB submittal document started.
Current Status 	**Forecast**
Primary PPM 3 deliverables are complete, working on a few remaining items (product description, knowledge area update). Started PPM 4 deliverables – primarily the IRB submittal document.	Tight schedule due to rotational slope work and demanding job. Currently forecasting to meet all PPM deliverables this semester. Little to no project work anticipated between update 2 and 3.
Anticipated Changes/Key Risks/Corrective Actions	**Key Takeaways/Where Help Needed**
Key risk is lack of availability to work on the project. I have been declining optional off rotation work opportunities and actively communicating my MSPM requirements to limit required off rotational work.	*Continuing to work on deliverables after deferral last semester was critical to initial success this semester. Keeping focused on R&Rs is mandatory to meet the major milestones and allow for final completion in Fall.* *Need feedback on project charter and schedule from all committee members.*

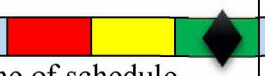
Project Status Report Dashboard #4 – 3/16/15

Synopsis of Project	**Progress Since Last Report**
This project will produce a framework which can be utilized by companies to implement competitive multi-year development programs specific to the unique Alaska Oil & Gas industry. Key aspects of the framework are job rotational every 18-24 months, mentorship best practices, and applicable higher education. The primary outcome will be increased retention of high potential individuals. The desired secondary outcome is a more knowledgeable work force and increased cross business collaboration.	All PPM 3 Deliverables. IRB submittal document started, key stakeholder review of Draft PMP.
Current Status 	**Forecast**
Primary PPM 3 deliverables are complete, focus is now on PPM 4 deliverables. Draft IRB submitted planned for end of the week.	Tight schedule due to rotational slope work and demanding job. Currently forecasting to meet all PPM deliverables this semester. Started R&R midweek, should see all of the final deliverables drafted in the next two weeks and finalized before April 8th.
Anticipated Changes/Key Risks/Corrective Actions	**Key Takeaways/Where Help Needed**
Key risk is lack of availability to work on the project. I have been declining optional off rotation work opportunities and actively communicating my MSPM requirements to limit required off rotational work. Updated risk – mental exhaustion. First order of business to mitigate risk of missing future deadlines is to incorporate all PPM deadline into the work outlook calendar, with a one day reminder. This will reduce the chance of misinterpreting the syllabus in an exhausted state.	*Continuing to work on deliverables after deferral last semester was critical to initial success this semester. Keeping focused on R&Rs is mandatory to meet the major milestones and allow for final completion in Fall.* Key lesson learned in the last month is submit deliverables once they are done, don't wait two weeks intending to do one last review and then miss the deadline.

Project Status Report Dashboard #5 – 9/04/15

Synopsis of Project	**Progress Since Last Report**
This project will produce a framework which can be utilized by companies to implement competitive multi-year development programs specific to the unique Alaska Oil & Gas industry. Key aspects of the framework are job rotational every 18-24 months, mentorship best practices, and applicable higher education. The desired outcome is a more knowledgeable work force and increased cross business collaboration.	Completed PM 686A. Continued discussions with sponsor. Began research and scheduling interviews.
Current Status 	**Forecast**
Compared to end of PM 686A baseline, behind. Reviewing schedule, utilizing change control process to adjust scope to ensure 2015 completion.	Tight schedule due to rotational slope work and demanding job. First PPM will be tight (due to the "all research" requirement). Expecting bulk of interviews and all of the lit reviews to be complete by PPM 1, remaining/follow-up interviews by PPM 2.
Anticipated Changes/Key Risks/Corrective Actions	**Key Takeaways/Where Help Needed**
Key risk is lack of availability to work on the project. Losing alternate after next R&R. To mitigate, planning project in combination with job requirements – allows for flexibility in meeting job and project requirements (interviews during work day) while ensure adequate time for my job (12+ hrs a day). Managing risk of mental exhaustion. All PPM deadlines into the work outlook calendar, which reduces the chance of mis-reading the syllabus in an exhausted state.	FEL - Need to stay focused and have a first pass of all documentation ("low quality" PPM 3) complete by the end of my next R&R (in 4.5 weeks). High functioning insomnia would be nice.

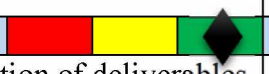
Project Status Report Dashboard #6 – 9/25/15

Synopsis of Project	**Progress Since Last Report**
This project will produce a framework which can be utilized by companies to implement competitive multi-year development programs specific to the unique Alaska Oil & Gas industry. Key aspects of the framework are job rotational every 18-24 months, mentorship best practices, and applicable higher education. The desired outcome is a more knowledgeable work force and increased cross business collaboration.	Completed PPM1. Continued discussions with sponsor. Completed initial interviews. Rebaselined schedule to incorporated execution changes (as captured in change control process). Utilized change control process to manage scope change/clarification.
Current Status 	**Forecast**
SPI 0.96 after rebaseline of schedule (was 0.16). This SPI is within acceptable thresholds as defined by the PMP.	With interviews complete focus is now on analysis and writing. Due to external pressures schedule remains tight but new plan is doable.
Anticipated Changes/Key Risks/Corrective Actions	**Key Takeaways/Where Help Needed**
Key risk is lack of availability to work on the project. Losing alternate after this R&R. To mitigate crashed schedule into this R&R and also planned project in combination with job requirements – allows for flexibility in meeting job and project requirements while ensuring adequate time for my day job (12+ hrs a day). Managing risk of mental exhaustion. All PPM deadlines into the work outlook calendar, which reduces the chance of mis-reading the syllabus in an exhausted state.	FEL - Need to stay focused and have a first pass of all documentation ("low quality" PPM 3) complete by the end of my next R&R (in 1.5 weeks). Need to continue discussions with student advisor on deliverable formats and past projects lessons learned.

Project Status Report Dashboard #7 – 10/23/15

Synopsis of Project	Progress Since Last Report
This project will produce a framework which can be utilized by companies to implement competitive multi-year development programs specific to the unique Alaska Oil & Gas industry. Key aspects of the framework are job rotational every 18-24 months, mentorship best practices, and applicable higher education. The desired outcome is a more knowledgeable work force and increased cross business collaboration.	Completed PPM2. Interview analysis compiled. Half of findings written up. Literature sources vetted. Schedule updated. Go/No-go decision – Go.
Current Status 	**Forecast**
SPI down to a 0.89 from previous 0.96. This SPI is outside of the acceptable range. Crashing options discussed with advisor and effort underway to correct.	With interview analysis complete focus is now on literature and writing up the results. Due to external pressures schedule remains tight but new plan is doable.
Anticipated Changes/Key Risks/Corrective Actions	**Key Takeaways/Where Help Needed**
Key risk is lack of availability to work on the project. Managing risk of mental exhaustion. All PPM deadlines into the work outlook calendar, which reduces the chance of mis-reading the syllabus in an exhausted state. – Update, this saved PPM 2 deliverables, and attendance of classes on correct days.	PM's R&R starting Wednesday, full focus on writing to ensure high quality draft for 11/6 PPM 3 deadlines. Deliverables and deadlines are achievable if PM can achieve projected availability and keep focused. Need to continue discussions with student advisor on deliverable formats and past projects lessons learned.

Project Status Report Dashboard #8 – 11/13/15

Synopsis of Project	**Progress Since Last Report**
This project will produce a framework which can be utilized by companies to implement competitive multi-year development programs specific to the unique Alaska Oil & Gas industry. Key aspects of the framework are job rotational every 18-24 months, mentorship best practices, and applicable higher education. The desired outcome is a more knowledgeable work force and increased cross business collaboration.	Completed PPM2. Draft paper written. Draft framework created Schedule updated. Go/No-go decision – Go.
Current Status 	**Forecast**
Sitting well for completion of deliverables prior to PPM 4 deadlines.	Will finish deliverables in the next week.
Anticipated Changes/Key Risks/Corrective Actions	**Key Takeaways/Where Help Needed**
Crashing of the schedule worked. Now just need to keep in contact with editing stakeholders for all updates/input.	Feedback on PPM 3 deliverables.

APPENDIX I: RESEARCH METHODS, ANALYSIS APPROACH, & SOURCES

Research Methods

Data will be collected in through interviews and self-conducted literature reviews. Surveys will not be done as the potential added value is minimal and does not outweigh the associated risks.
Through the literature I will be able to harvest current state information on the Alaskan Oil & Gas industry along with best practices. Specific literature sources will be identified and procured with the assistance of the Project Sponsor, Josie Wilson. Primary tools utilized will be the Get Abstract tool through CH2M HILL University and the UAA Consortium Library. Key words utilized in these searches are: Human Resources, Field Rotation, Job Rotation, Job Rotation Programs, Generational Differences, Modern Mentorship, Coaching vs Mentoring, Millennials, Motivating Millennials
The interviews will provide feedback on the value of the frameworks components in terms of meeting the project objective of increased retention. Interview sources have not been finalized, however an initial list has been drafted below. Interview sources will be categorized in one of four ways – management, high potential individuals, individuals executing similar programs, and human resource professionals. A separate set of interview questions will be developed for each category.

Analysis Approach

Retention information will be graphically depicted utilizing a histogram. This will provide indication of industry trends. Intent it to compare target companies (Engineering/Construction/O&M) against the overall industry, and against owner companies with similar programs.
Key areas will be identified which effect retention, and frequency of use will be counted and graphed from exit interviews and self-conducted interviews. Increased frequency correlates with higher implied value.
All company information will be kept anonymous in final deliverables. One challenge in vetting the information will be the question of authenticity. It is expected that much of the exit interview information and other statistical data will be biased in favor of the company, due to the exiting individual's reluctance to burn bridges.

Potential Research Sources

Literature Review

- Alaska O&G Information
    - List of Oil & Gas producers and general contractors in Alaska
    - Retention
        - CH2M HILL Retention Statistics
        - Other Engineering/Construction/Operations Contractors Retention Statistics
            - ASRC, AECOM, NWP, CH2M HILL

        - SHRM (Society for Human Resource Management)
      - Retention Statistics of Participants in Similar Programs
      - Overall Alaska O&G Industry Statistics
        - UAA ISER
        - SHRM
        - AEDC (Alaska Economic Development Corporation)
      - Exit Interviews
- Similar Programs
  - BP Challenger Program
  - Conoco Summit Program
  - Others?
    - SHRM (Society for Human Resource Management)
    - Prior Research
- Mentorship
  - Define Mentoring in terms of this framework
  - Get Abstract Business Book Summaries
    - Book: Keeping The Millennials
  - UAA Consortium Databases
    - Ask a librarian about which database to use
    - LexisNexis – Business database
    - APA.org paper
    - Journal of Organizational Behavior
  - Modern Mentoring Presentation
  - Presentations on Millennials & Bridging the Generations
  - SHRM Generational Differences Report
  - Terry Nelson (UAA College of Business) – Leadership Fellows program
  - Articles & books assigned by Paula Donson in PM 690 Advanced Leadership
  - Key Words: Human Resources, Field Rotation, Job Rotation, Job Rotation Programs, Generational Differences, Modern Mentorship, Coaching vs Mentoring, Millennials, Motivating Millennials
- Higher Education
  - Define if education is needed for advancement
    - Need research supporting/denying this
      - Potential sources: LuAnn, ISER
      - Average income
      - Average education of C-Level AK people
  - Relevant distance programs that utilize work experience for credits (focus on project, construction, and engineering management)
    - UAA MSPM Program
    - Undergrad PM Distance Program
    - Others

<u>Interviews</u>

- Management
  - Engineering/Construction/Operations Contractors
    - ASRC
    - AECOM

        - NANA Worley Parsons
        - CH2M HILL
    - Clients?
- High Potential Individuals
    - CH2M HILL ALDP Graduates & Participants
    - Professional Affiliations
- Similar Programs
    - Challenger Program
    - Summit Program
    - Others
- Human Resource Professionals
    - SHRM

Research Methods & Analysis Approach Approval

RE: Research Methods Approval

From: **Roger K Hull** (rkhull@uaa.alaska.edu)
Sent: Fri 4/03/15 11:33 AM
To: 'Ryan Loomis' (ryan.loomis@hotmail.com)

Ryan,

Your Research Method and Analysis Approach for PM686A are approved.

Regards,

Roger

Roger K. Hull, PMP, CISM, CRISC
Instructor, PM Dept
UAA
rkhull@uaa.alaska.edu
907-786-1923 (office)
907-346-6280 (cell)

A FRAMEWORK FOR A MULTI-YEAR DEVELOPMENT PROGRAM TARGETING HIGH POTENTIAL INDIVIDUALS IN THE ALASKA OIL & GAS INDUSTRY

PROJECT CHARTER

Ryan Loomis

PM 686A - Project Initiation and Planning

MSPM University of Alaska Anchorage

Spring 2015

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Section 1. Project Overview

1.1 Project Description

This document defines this project and details at a high level. This project is being initiated in order to identify and address the issues associated with retaining high potential individuals in the competitive Alaska Oil & Gas Industry. The project manager for this project, Ryan Loomis, has full authority as granted by the sponsor, Josie Wilson, to utilize any time as needed to complete the project

In order to accomplish the project goal of identifying and addressing retention in high potential individuals, the project manager will produce a framework for implementing a multi-year development program. This framework will be made available to all stakeholders.

1.2 Project Scope

This project will produce two deliverables: 1. a project management plan that details exactly how the project will be executed and 2. a framework for implementing a multi-year development program targeting high potential individuals and the Alaska Oil & Gas industry. The framework will include periodic job movements, mentorship best practices, and applicable higher education. The framework will come from analysis of a compilation of sources, including self-conducted literature reviews and interviews with relevant sources. The planning of this project will begin August 29th, 2014 and be completed by December 15st, 2015.

Project Excludes

- This project does not include implementation of the development program.
- This framework will not be tailored to a specific company, resources, or individual.
- This project does not include a training associated with applying or handing off the documentation.
- This project does not include a financial breakdown or cost analysis.
- There will not be a real world test on the effectiveness of the designed program.

1.3 Critical Success Factors

- Deliverables are completed and submitted on time
- Sufficient data is collected to complete the development program execution plan
- Final framework is accepted by the project sponsor

1.4 Assumptions

- The advisory committee will be available review all project documents and PPM's
- All deliverable can be completed by completion of PM686 class series
- The project manager will be the only resource assigned to work packages
- There is no funding associated with this project
- Sufficient data from interviews to support analysis.

1.5 Constraints

	Schedule	Scope	Cost
Fixed	X		
Somewhat Flexible		X	
Flexible			X

1.6 High Level Project Risks

Risk Register

Risk Name	Description of Risk	Likelihood	Impact	Risk Level	Response Type	Owner
External Risks (Conditions outside the control of the project)						
PMP	PMP not approved by Sponsor	Low	High	Low	Mitigate; Check in with sponsor throughout planning process	Sponsor
Research	Lack of available interviewees	Medium	Medium	Medium	Mitigate; early identification and contact of interviewees	PM
PMP, Project Completion	Project Manager has unscheduled work shifts or extended work shifts.	High	High	High	Mitigate; PM to decline optional OT, build slack into schedule by reducing PM resource availability. Discuss with supervisor, clear communication on R&R commitments. Project deadlines are to be incorporated into PM's Outlook calendar.	PM
Internal Risks (Conditions within the control of the project)						
Project Completion	PM Defers	High	Medium	High	Mitigate; Plan PM 686A and 686B a semester apart. Work on deliverables prior to start of semester.	PM
Research	Lack of Data	Medium	High	Medium	Mitigate; determine sources during planning phase. Begin contact of potential sources during planning.	PM

Section 2. Project Authority and Milestones

2.1 Project Oversight Authority

This project will be using an advisory committee consisting of 3 members. The advisory committee will serve as the project oversight authority.

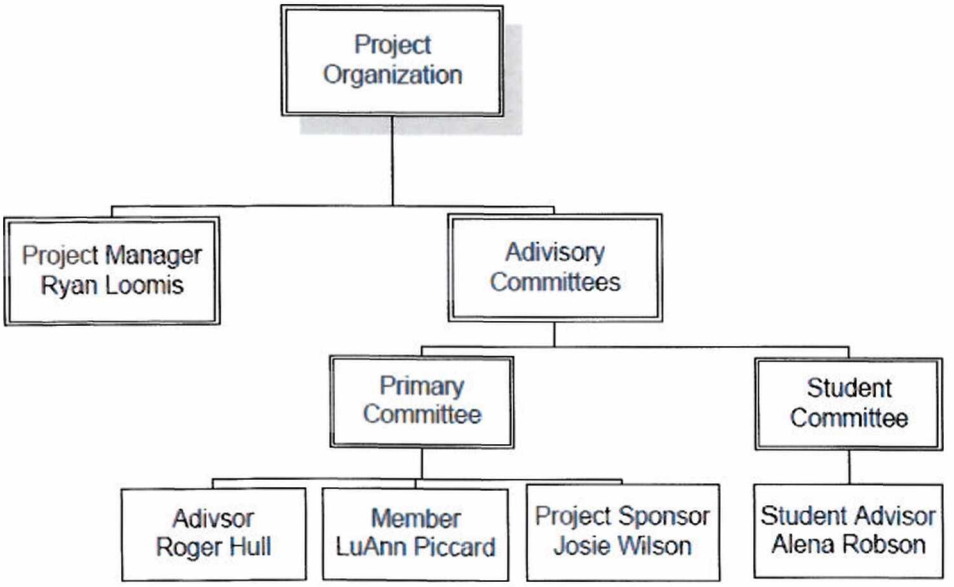
Advisory Committee Members		
Name	**Role**	**Organization**
Roger Hull	Primary Advisor	UAA Project Management
LuAnn Piccard	Committee Member	UAA Project Management
Josie Wilson	Committee Member	Training & Leadership Development Manager

2.2 Projected Major Project Milestones

Milestone/Deliverable	Target Date
Project Start	8/29/14
Presentation of PMP	4/20/15
Planning Complete	4/28/15
Framework Complete	11/20/15
Presentation of Project Deliverables	12/15/15
Project Completion	12/15/15

Section 3. Project Organization

3.1 Project Structure



3.2 Roles and Responsibilities

Role	Responsibility
Project Manager	Manage project and complete all deliverables
Project Sponsor	Accept final project deliverables
Primary Advisory Committee	Advise project manager during all phases of project
Student Committee	Provide as needed review and guidance

3.3 Responsibility Matrix

Major Milestone	Project Manager	Project Sponsor	Primary Advisor: Hull	Committee Member: Piccard	Committee Member: Wilson
PPM 1	R	C	A	C	C
PPM 2	R		A	C	C
PPM 3	R		A	C	C
PPM 4	R		A	C	C
Presentation of PMP	R	C	A	I	I
Project Execution: Phase 1	R		A	C	C
Project Execution: Phase 2	R		A	C	C
Project Execution: Phase 3	R		A	C	C
Project Execution: Phase 4	R		A	C	C
Final Presentation of Deliverables	R	C	A	I	I
Project Closeout	R	C	A	I	I

R=Responsible A=Approve C= Consult I= Inform

Section 4. Points of Contact

Role	Name / Organization	Phone	Email
Project Manager	Ryan Loomis	(425) 344-9684	Ryan.Loomis@hotmail.com
Primary Committee Advisor	Roger Hull / UAA Faculty	(907) 786-1923	RKHull@uaa.alaska.edu
Project Sponsor & Committee Member	Josie Wilson / CH2M HILL	(907) 230-8179	Josie.Wilson@ch2m.com
Committee Member	LuAnn Piccard / UAA Faculty	(907) 786-1917	LPiccard@uaa.alaska.edu

Section 5. Project Acceptance

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
Ryan Loomis	Project Manager	Ryan Loomis	4/6/15
Josie Wilson	Project Sponsor	Josie Wilson	4/6/2015

Section 6. Revision History

Version	Date	Name	Description
0.0	11/17/14	Ryan Loomis, Project Manager	Project Charter Creation
1.0	1/30/15	Ryan Loomis, Project Manager	Project Charter Draft
2.0	4/3/15	Ryan Loomis, Project Manager	Project Charter Finalized

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CH2M HILL 949 E. 36th Ave Anchorage, AK 99508

University of Alaska Anchorage
Project Management Department (MSPM)
3211 Providence Drive
Anchorage, AK 99508

January 28, 2015

Dear Ms. Piccard,

It is my sincere pleasure to support Ryan Loomis with his MSPM project. Please accept this letter as our approval for his project developing high performing employees who exhibit potential for leadership (high potential) in the Oil and Gas industry in Alaska at CH2M HILL.

CH2M HILL is the second largest employer in the State of Alaska for the oil and gas industry. This market leadership position with over 2,600 employees includes the opportunity to equip and develop the current top performing talent in the company for future managerial positions. Therefore, Mr. Loomis' project will be of considerable value to the training and development department called CH2M HILL University. We are enthusiastic for the potential outcomes of the project including employee recruitment, retention, morale, and engagement.

Thank you for all your efforts and for providing an educational environment in which local firms can benefit from the outcomes of these projects. We appreciate you and this program at the University of Alaska Anchorage.

I look forward to supporting Mr. Loomis in this endeavor and am available to address any questions or additional support I can provide.

Sincerely,

Josie Wilson, MBA
Regional Training & Leadership Development Manager – Alaska and Russia
Direct Dial-907-762-1282
Mobile Phone- 907-230-8179
Josie.Wilson@ch2m.com