

NON-PROFIT FUNDRAISING EVENT PLAN

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NON-PROFIT FUNDRAISING EVENT PLAN

A

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## **Abstract**

This project conducts applied research through a fundraising project for the Alaska Institute for Justice (AIJ). Founded in 2005, AIJ is a non-profit agency that provides legal services to immigrants and refugees. It represents people fleeing persecution in their home countries as well as domestic violence and human trafficking crime victims. It provides the only low-fee services of its kind in the state, helping community members who are often isolated, low-income, vulnerable to abuse, and with few other avenues to gain legal representation. AIJ also operates a statewide language interpreter center that provides immigrant and refugee expertise to numerous state and federal agencies dedicated to health care, social services, and law enforcement.

The AIJ fundraising project will analyze the effectiveness of project management tools used during planning and execution of a new fundraiser event plan. The project will also apply literature reviews and interviews to assess AIJ's and other mature Anchorage area non-profits' familiarity with project management tools and to provide recommended project management tools to improve organizational efficiency. The project's products include an event plan that consists of immigrant speaker performances and a silent auction. The deliverables are an event checklist and continuity documents to help AIJ repeat this fundraising event annually. In addition, the project will deliver publicity tasks designed to increase awareness of the AIJ mission, expand AIJ's donor base, and increase its annual donor revenue.

### **Key Words**

Non-profit

Non-profit boards

Fundraising

Fundraiser

Repeatable event

Management challenges

Donor base

Immigrant

## Introduction

### About Alaska Institute for Justice

*“AIJ’s clients are amazing, resilient Alaskans who have come to the state seeking safety, to reunify with their family, and to contribute to building the community.”*

- Robin Bronen, AIJ Executive Director

The Alaska Institute for Justice (AIJ), a non-profit based in Anchorage, AK, provides unique legal services to immigrants including naturalization assistance, visas, and family-based immigration petitions. AIJ serves over 850 Alaskan residents annually through assistance with health care, social services, and law enforcement agencies. Their priority is on representing people fleeing persecution in their home countries, as well as domestic violence and human trafficking crime victims. AIJ provides the only low-fee services of its kind in the state, helping community members who are often isolated, low-income, vulnerable to abuse, and with few other avenues to gain legal representation. AIJ works with survivors of both sex and labor trafficking. They partner with Standing Together Against Rape (STAR), Abused Women’s Aid in Crisis (AWAIC), and Covenant House to ensure survivors receive comprehensive services. The institute also works closely with the FBI, US Attorney’s Office, Alaska Department of Labor, and Municipality of Anchorage Department of Health and Human Services to assist with intensive case management, social, medical, and legal advocacy to help victims achieve immediate safety, protection, and stability.

AIJ also operates a statewide Language Interpreter Center (LIC) that provides translation services as well as immigrant and refugee expertise to hundreds of state and federal social, legal, and medical professions. The LIC provided interpreters for more than 2,500 medical, legal, and social service appointments in 2015. They currently work with more than 200 interpreters in over 35 languages, including Alaska Native languages. The LIC also provides training on ethics, roles, and responsibilities of working with interpreters.

In addition, AIJ leads a Research and Policy Institute focused on providing unique and critical services to communities affected by climate change. The rapidly changing Arctic climate and resulting erosion and extreme weather events are impacting the well being of Alaska Native communities. AIJ is conducting groundbreaking research that strives to increase the adaptive capacity of Alaska Native communities. This research includes strategies to articulate community needs to organizations that may provide technical or financial assistance. AIJ is currently working with 14 Alaska Native communities on community-based adaptation strategies.

### AIJ’s Non-profit Business Challenge

One of the biggest challenges for most non-profit organizations, including AIJ, is fundraising. AIJ has been operating for over 10 years, relying primarily on grants and donations. Currently, donation revenues comprise approximately one percent of its annual budget while the majority of its revenue comes from grants. Grant funding is considered challenging because it must be used under very specific conditions and grant awards are uncertain year

to year. This volatility inhibits long-term organizational financial planning. Because of the challenges with grant funding, unrestricted funds raised through donations are a valuable way for AIJ to provide financial sustainability and meet all the needs of the organization and its clients.

AIJ's donor base is currently comprised of three main events: the Permanent Dividend Fund "Pick, Click, Give," an annual fall trivia event aimed at community lawyers and business people, and an annual December letter mailed to target donors. This project's intention is to provide AIJ with a fourth major fundraiser in the spring that the organization will be able to repeat annually. In addition, the project will meet the challenge of expanding a donor base by raising awareness through positive publicity and advertising of the event.

### **Problem Statement**

The applied research of the AIJ Fundraiser project will include analysis of the tools and templates used during the project planning and execution intended to create a new fundraising event plan. Using the new AIJ fundraiser "Beyond Borders" as a case study, the research will analyze whether a Project Management Plan and Microsoft Project schedule are effective tools to plan and execute a small-scale fundraising event. The research will also analyze whether the tools used helped to provide useful product deliverables. In addition, the research will explore whether other local non-profits apply project management tools to successfully execute and repeat fundraising events.



## **Research Methodology**

### **Methods**

Through the applied research of a fundraising project for AIJ and additional non-profit organizational research through literature review and interviews of non-profit leaders, this research project will accomplish the following:

- Evaluate the success of the project management tools applied during the planning and execution of this project
- Evaluate the quality of deliverables for a repeatable fundraising event
- Interview Anchorage-based mature non-profits to explore whether other local non-profits apply project management tools to successfully execute and repeat fundraising events

### **Analysis Approach**

To gain insight into the types of project management tools commonly used in non-profits for fundraising projects, this research will include a broad literature review and interview data to qualitatively understand the level of project management tools currently in use. The research will also identify existing organizational assets and which new tools may be most helpful to future non-profit fundraising events.

The researcher will analyze the efficacy of the project tools utilized during the execution phase. This will include an analysis of time management tools, Earned Value Management thresholds, and project manager responses taken. The research will also qualitatively analyze stakeholder and communications management during execution and usefulness of project management tools used.

The researcher will conduct a literature review of project management course textbooks, journal articles, books, and news on non-profit project management tools. The literature review will examine the following in respect to non-profits: prominently used project management tools, the argument for using project management tools, the challenges adopting and implementing project management tools, and recommendations for future research.

The results will lead to conclusive recommendations and proposals by examining whether the tools used in this project were effective, whether the same tools should be applied to other non-profit projects, and additional suggestions to help non-profit organizations maintain repeatable fundraising event plans.

### **Interview Protocol**

Interviews of non-profit organizations included data collected from one non-profit consulting expert and five Anchorage-based mature non-profits. The interviewees were comprised of one chief operating officer, two executive directors, one senior public relations officer, and one director of research. These organizations were considered mature and selected based on their common recognition as established, reputable Anchorage non-profits. Seven total non-profits were solicited for interviews, with a 71% response rate, resulting in five total respondents. Upon the

recommendation from one of the non-profit leaders interviewed, one non-profit fundraising consultant was included as an additional interviewee.

The interview was designed to address the research questions: How familiar are Anchorage non-profits with project management tools and competencies? Could local non-profits benefit from and are they amenable to outreach to help non-profit organizations manage their projects more efficiently?

The interview included two organization demographic questions related to size and age of the organization and the interviewees' length of employment with their respective organization. The exhibit below provides demographic details of each organization interviewed.

<b>Non-profit Organization</b>	<b>Size of Organization (Employees)</b>	<b>Number of Years in Service</b>	<b>Contact Name/Position</b>	<b>Years with Organization</b>
Alaska Institute for Justice	Less than 25	10-20	Robin Bronen, Exec Dir	11 yrs
Anchorage Neighborhood Health Center	Over 100	More than 20	Tammy Green, CEO	1 yr
Arc of Anchorage	Over 100	More than 20	Clara Sanderson, Sr PRO	1 yrs 1 mo
Catholic Social Services	25-100	More than 20	Lisa Aquino, Exec Dir	1 yrs 4 mo
Foraker Group	25-100	10-20	Andrew Cutting, Dir of Research	7 yrs

**Exhibit 1 - Interview Demographics Table**

The interview also addressed each contact's familiarity with Project Management Institute best practices and Project Management Body of Knowledge concepts and what categories of tools they currently used to manage and control fundraising and other organizational projects. The interview then provided categories of results and asked each contact to choose which would provide the most benefit to their organization in regard to managing and controlling projects. This question was designed to determine what these non-profits are trying to accomplish with their management tools. The next interview question asked whether the organization would welcome project management best practices to help manage projects. The final question was an open-ended request for additional comments or recommendations for further non-profit project management research.

The results of these interview questions will be presented in the Research Analysis and Research Results sections of this report.

## Literature Review Results

The goal of the literature review was to identify prevalent use of project management tools and best practices in the non-profit sector. Project management textbooks, journal articles, books, and news were analyzed to identify trends or opportunities for further research. This research data will be used to help evaluate the tools and templates employed during the applied research of project planning and execution and analyze whether the tools used helped to provide useful product deliverables. It will also provide a foundation of data from which to analyze local non-profits in their application of common project management tools. The research will explore why project management concepts should and do work in non-profits and why these concepts may be a challenge to implement in non-profits. Finally, the research will facilitate the identification of opportunities for further research and training.

A non-profit organization is most often defined by the Internal Revenue Service tax code classifying it as a tax exempt, charitable 501(c)(3) organization. But what separates a charitable organization from other types of tax-exempt organizations is its purpose: it must *benefit the broad public interest*, not just the interests of its members. It must serve one or more of the following purposes, which come from the IRS: charitable, religious, educational, scientific, literary, testing for public safety, fostering national or international amateur sports competition, or the prevention of cruelty to children or animals (Independent Sector, 2016).

Non-profit organizations are ubiquitous (Powell, 2006). They are widespread, sometimes well known international organizations like the Red Cross, Doctors Without Borders, and the United Nations Children's Fund. Many non-profits have frequent interactions with the local community, such as religious churches, mosques, and synagogues. They take the shape of large foundations or universities with assets worth billions of dollars. In 2010, non-profits accounted for 9.2% of all wages and salaries paid in the United States and accounted for 5.3% of the Gross Domestic Product in 2014. Approximately 25% of Americans over the age of 16 volunteered through or for an organization between September 2010 and September 2014 and this rate has stayed constant since 2003. Charitable contributions by individuals, foundations, bequests, and corporations reached \$358.38 billion in 2014 (National Center for Charitable Statistics, 2015).

Due to their value to society and the public trust they rely on to function, it is important for non-profits to operate efficiently. One could argue that non-profits are already managerially efficient because the nature of their funding demands efficiency and transparency to maintain public trust. This necessary efficiency should apply in theory to projects undertaken by non-profits as well. Non-profits commonly conduct projects involving fundraising, organization moves, technology upgrades, awards dinners, process improvement initiatives, and advertising campaign development (PMI Puget Sound, 2014). Project management concepts can be applied across a wide array of projects and organizations and their application could greatly benefit non-profits, especially in the case of complex projects such as a new capital campaign that involves feasibility studies, fiscal reports, development, and operational turn over. Tools and skills can add value through better definition of the project goals, resource

utilization, benchmarking, risk mitigation, managing stakeholder expectations, improved organizational efficiency, and elimination of “reinventing the wheel” (PMI Puget Sound, 2014).

The language of strategic project management tools is used within most small to medium voluntary sector organizations. However, there may be inherent tensions in using these tools within non-profit organizations, which were designed for and initially utilized in “big business” (Myers, 2003). This idea of for-profit tools could be a philosophical barrier to non-profits adopting project management tools and techniques. For-profit project management concepts also need to be put in context and demonstrated as beneficial to non-profits for these tools and techniques to be readily accepted and applied. There are limited non-profit project management case studies or other examples found in management literature but many non-profit leaders have experience in the business world, an increasing number arrive from outside the humanitarian sector (Myers, 2003), and many are familiar with mainstream management concepts. This should provide a foundation on which to successfully build prolific use of project management tools in non-profits. But other barriers and challenges exist.

Project management concepts may also be a challenge to implement in non-profits due to non-profit organizational culture. The organizational culture, taken together with its fundraising implications, is a key indicator of how well that organization will ultimately be able to fulfill its mission (Pagnoni, 2014). The organizational culture is further defined by how great and how large the different revenue sources shape the organization. These revenue sources include grants, government contracts, and individual donor gifts. How an organization subsists on these sources often leads to its methods of operation. For example, if an organization relies primarily on state or federal contracts, it will design a major portion of its program to continue soliciting these contracts. On the other hand, an organization with various revenue sources is often more flexible and adaptable and may seek creative ways to raise revenue and operate in general.

The scale and complexity of projects undertaken in non-profits may also contribute to resistance to project management tools and techniques. The majority of non-profit organizations are small organizations (less than the equivalent of four full-time workers) where operational management and governance of the organization blur, with members of the governing body working alongside paid staff members (Myers, 2003). Often, major projects are treated as short-term efforts executed by part time or contracted staff and the long-term strategic implications are overlooked. To these organizations, the training and education investment required to learn project management principles may not be seen as worth the benefit to manage brief, small projects.

Another challenge faced by managers of non-profits is that philanthropic professionals are often faced with more uncertainty, and even with best practices, they may not be able to acquire the required resources to carry out projects successfully (Kent, 2005). Often, events rely solely on volunteers and do not have the staff to support needed back up plans. And, particularly in Alaska, the health of the local economy affects the degree of organizational funding challenges.

Despite the philosophical, organizational culture, scale, and economic barriers preventing non-profits from applying project management tools and techniques, there are straightforward and uncomplicated best practices that can be adopted to provide long-term strategic benefits. In any case, even small projects should be based on a solid plan. Applicable tools include using simple work breakdown structures and resource assignment matrices to stay organized, planning stakeholder engagement to improve relationships and communication, and using risk analysis to address risk mitigation and response.

Non-profit organizations face very similar challenges to profit-oriented organizations regarding strategic planning and sustainability. Yet, studies have given very little consideration to non-profits. In the field of Project Management, scientific literature focused on project management in non-profit organizations appears to be poor. Except for some handbooks and other specific articles referring to cultural organizations (See *Non Profit Management and Leadership Journal*), it is difficult to find data and elements of analysis about project management practices in the non-profit sector (Bourgeon, 2008). There is clearly a significant need for action as regards empirical research and conceptual work in non-profit organizations (Daub, 2014).

One example of successful collaboration in this endeavor is the joint effort of Xavier University, Southwest Ohio Project Management Institute (PMI) chapter, and the Cincinnati United Way. Together they have established a program to teach project management by engaging students in solving real problems for local non-profit organizations (Woodward, 2004). The local PMI chapter promotes project management in the community, local college students gain experience in project management, and the United Way receives a valuable service.

There are other valuable entities that assist non-profits with management challenges. The Foraker Group mission is dedicated to a healthy, sustainable nonprofit sector in Alaska. Foraker guides organizations on their sustainability journey by exploring the essential elements of organizational focus, right people, partnerships and unrestricted funds. The Foraker Group and non-profit fundraising consultants exist because the majority of non-profits live on the margins and are greatly challenged by revenue streams.

Although there are scant scholarly journal articles or other literature specifically addressing project management in non-profits, there is a clear opportunity for further research exploring how project management tools and training can improve efficiency, even in mature, established non-profits. There are also opportunities for local Project Management Institute chapters to offer training to local non-profits, as has been done with the Puget Sound Chapter. In addition, non-profit organizations and project management students could greatly benefit from joint projects applying project management tools in major project while also advancing the project management body of knowledge.

## Research Analysis

### Project Management Tools Tested

This project utilized three main project management tools to plan and execute the project: a charter, a Project Management Plan (PMP) and a Microsoft Project schedule. In addition, the project manager focused on four PMBOK knowledge areas throughout the course of project planning and execution.

#### Charter

The charter was developed early in the planning phase while the PMP was simultaneously being developed. The charter provided a clear description of project purpose and scope and a list of deliverables the PM would provide to the organization. It was also a user-friendly way to establish a scope baseline and a broad understanding of the project with stakeholders who did not have time to wade through a larger, more detailed PMP. Since this was a new project for AIJ and the project sponsor was not familiar with project management tools, this document was crucial in helping the PM and key AIJ stakeholders agree to the intent and desired results of the project. Had a charter not been used, the project would have lacked the foundation of understanding that supported effective communication with AIJ stakeholders.

#### Project Management Plan

The PMP was developed during the planning phase of the project. It included in depth explanation of the scope and project conditions and provided further clarity on the nature of the project and how it should be managed. The 30-page document was referenced often throughout project execution. From the planning draft, there were three minor revisions to scope that included a change to the nature of the event performance from music to storytelling; an update to the marketing and speaker tasks, and cancelling a few tasks that fell outside of the scope of the project. There was also one major scope change following the event date change beyond the academic deliverables due date. This led to a revision of final product deliverables, the exclusion of the event itself as a deliverable, and a need to rebaseline the project schedule due to the date change.

One of the most useful portions of the PMP was the narrative. It provided a living document that traced the evolution and decision-making throughout the project. Although it sounds simple and logical in hindsight, many planners overlook the importance of documenting the small details, steps, and rationale behind decisions and project changes. The narrative was used to capture the entire project lessons learned, contributed to critical success factor analysis, and it assisted the thought process behind dynamic schedule changes.

The PM noted some areas for improvement in the PMP during project execution. The scope management strategy spelled out in the plan--to follow the integrated change control process outlined in the plan--was adequate to prevent scope creep and process appropriate changes. However, the plan should have included a requirement for a formal feasibility study to present course of action options to stakeholders when major changes were requested. This would

have improved stakeholder management and communications, and would have provided a structure for AIJ stakeholders to weigh options and make decisions. Instead, the PM informally discussed changes and revised the plan independently.

The event date change also resulted in a planning phase lesson learned: that the planning phase should have included establishment of a firm event date. Although the plan lacked a requirement to conduct a feasibility study, the PM quickly realized the value a feasibility study would have served to all stakeholders after the expected event date was delayed. This meant that the event itself needed to be moved to outside of the scope of the project. A feasibility study would have ensured stakeholders considered the major change in deliverables as an acceptable course of action.

But what was the PMP value overall to a new fundraising event? It provided clear processes, key performance metrics, and schedule guidelines to create the event deliverables and monitor success of the project. It defined scope unambiguously and provided change control guidelines. The risk management plan contributed to the success of the project academic deliverables when a risk response was implemented to conduct further research. The hybrid stakeholder-communications register was used often. But, since the PM was the only person to handle the PMP, it did not contribute to the organization maturity of the non-profit overall. The products created, including the event checklist, contact lists, and possibly the project charter, are most likely the only products that will be used by the non-profit to repeat this event in the future. This is the PM's conclusion based on the lack of PM experience within AIJ and across non-profits, as later identified in the interview section of this report.

### Microsoft Project Schedule

The Microsoft Project schedule was also developed in the planning phase of the project. Utilization of MS Project schedule helped the PM ensure all tasks would be accomplished in time to support the event date. A secondary benefit was that it provided a way to measure project results and help define how effectively the PM conducted the project. Schedule analysis answered not just how the project went but how well it was conducted.

The MS Project schedule proved valuable to a new fundraising event. It provided management of time critical tasks, gave organization to a new project, and helped the PM multi-task. The PM referenced the Gantt chart almost daily and it was the foundation of the entire project.

There were many lessons learned while using MS Project during execution. "Executing a project is often a more chaotic experience than anticipated in the project plan (Ambriz & Landa, 2015)." This is an understatement. The learning curve was steep and the schedule remained dynamic throughout the planning and execution phases of the project. The largest schedule challenge in this project was meeting task time constraints while managing the over-allocated resource, the PM. To resolve over-allocated resources, the PM first reviewed the critical tasks to ensure these were not over-allocated. Then the PM expanded work hours available in MS Project from the initially planned

half-days, no weekends, and no availability over spring break to occasional full days, some weekends and a normal work week during spring break. After using the “level all” feature in MS Project, a few tasks spanning the same two days were still over-allocated. At this point, the PM followed Dynamic Scheduling recommendation to level by hand and to not use MS Project 2013’s leveling features if there are just a few over-allocations in the schedule (Ambriz and Landa, 2015).

The second most significant schedule challenge was the decision whether to rebaseline the schedule after a significant scope change. Resetting the project baseline should be a last resort after all other options to amend the schedule are considered. In this case, the major scope change following the event date delay resulted in the removal of significant deliverables. Consequently, resetting the baseline was necessary to maintain the integrity of the project and to keep earned value metrics (EVMS) accurate.

### PMBOK Knowledge Area Focus

The PM also chose four PMBOK knowledge areas to focus on during the course of project planning and execution. These areas were time management, stakeholder engagement, communications management, and quality management. The PM also examined risk management in detail throughout the project.

Time management was chosen as a focus area because of the PM’s self-identified lack of MS Project knowledge during the planning phase and because time was the driving project constraint. All of the academic and product deliverables had specific deadlines. Below is the project constraint priority matrix.

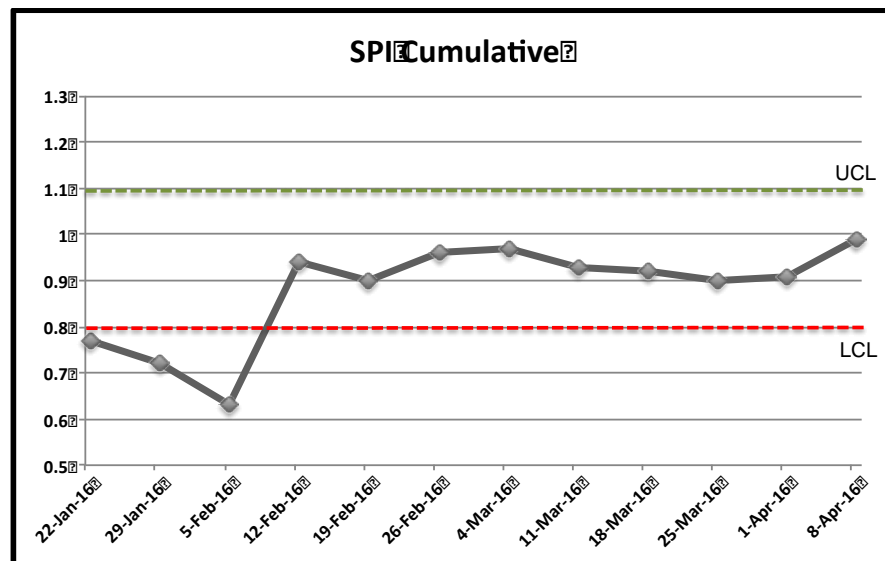
	SCOPE	TIME	COST
CONSTRAIN			
OPTIMIZE			
ACCEPT			

**Exhibit 2 - Project Constraint Priority Matrix**

This project involved formulating and documenting tasks, providing proper relationships across tasks, estimating durations of tasks, and monitoring the status of project activities. The schedule key performance indicator (KPI) utilized was schedule performance index (SPI). The SPI is an index showing the efficiency of the time utilized and is calculated as earned value divided by planned value. According to the PMP Metrics Management Plan, an SPI is between 0.8 and 0.9 should include a decision by the project manager whether to modify resources accordingly to try to maintain the project schedule, including working additional hours each week if necessary to maintain the project schedule.



The secondary KPI utilized was schedule variance (SV) percentage, calculated as earned value minus planned value. If the SV is positive, it indicates the project is ahead of schedule. A negative SV indicates the project is behind schedule. According to the PMP, extreme positive or negative SVs by task should be examined more in depth and root cause analysis applied where deemed appropriate by the project manager. The project tolerance for SV % is +/- 5 percent. The project manager made decisions to take appropriate action if the project goes beyond this tolerance. The project manager also monitored duration variance in Microsoft Project to gauge the project's most critical constraint, which was time. On the EVM control chart listed below, the SPI on Feb 5<sup>th</sup> that was well out of standards was due to an incorrect setting in MS Project. A reset of EVM to the most current baseline (Feb 4) through the MS Project options corrected the project metrics.



**Exhibit 3 - EVM Control Chart**

Stakeholder management was designated a focus area to ensure the project's goals were aligned with stakeholder needs during the creation of product deliverables that were intended to be templates for future fundraising events. Stakeholder management was also important to help the PM enhance relationships and influence without authority, as the PM was working with unacquainted non-profit employees and volunteers.

The PM learned several stakeholder management lessons. First, periodic iterative user needs assessments, in line with improvements in the deliverable quality acceptance criteria process, should have been defined in the PMP as part of the stakeholder management plan and the schedule should have included these periodic assessments. Instead, the PM used informal, ad hoc feedback to ensure deliverables met expectations. This was a disordered process that would benefit from formal, scheduled user needs assessments, especially because the product deliverables were new to the non-profit stakeholders. It also may have prevented rework of the time consuming task of gathering new donor contact information. A positive stakeholder management lesson learned was how beneficial the collaborative

and genial connections of a few of the stakeholders developed into excellent opportunities to improve the quality of product deliverables. This may sound like simple networking, but it was much more, as the collaborations with experienced stakeholders led to synergistic effects on this project plan and schedule resulting in a much improved marketing campaign and preparation of the event storytellers. The end results also reciprocally provided the supportive stakeholders with future opportunities for their own upcoming projects.

Communications management was assessed to ensure useful and timely project information was provided to key stakeholders, to establish who needed what type of information, and how and when they would get the information. Email communications, a periodic project dashboard, planning meetings, and tracking change requests and major issues in the corresponding logs according to the PMP kept the communications flow running smoothly. One minor recommendation for future projects is to communicate in depth with the sponsor and executive sponsor regarding their travel schedules versus the project schedule. This may have prevented several of the tasks falling slightly behind schedule.

Quality management was evaluated to ensure the project met identified quality requirements and standards, including course and product deliverables. Quality as a delivered performance or result is “the degree to which a set of inherent characteristics fulfill requirements (PMI PMBOK, 2013).” The primary methods to accomplish this, as outlined in the PMP, was to track and evaluate cumulative course grades and to review product quality with AIJ stakeholders.

A major lesson learned was that the PMP quality management plan did not have formal product acceptance criteria or a process to formally acknowledge customer acceptance of the products. Although informal acceptance of product deliverables occurred through email and meetings, the quality of project deliverables that are novel to an organization will benefit from formal acceptance process and criteria, as it improves customer satisfaction and understanding of the products. This project needed clearer definitions of deliverable features and attributes required by the sponsor. These should have been determined during the project planning phase. During execution, there was not enough PMP information addressing how to gauge quality of product deliverable other than “ensure all deliverables meet the needs of the stakeholders and are timely.” The PMP only addressed specific quality criteria for academic deliverables. In addition, the PMP needed to explain how a formal feedback or acceptance process should have been carried out between the project sponsor and PM. This process was important to define since a new fundraising project was uncharted territory for both the PM and key AIJ stakeholders.

Risk, although not a knowledge focus area, also merits discussion. Part of the project risk management plan, as outlined in the PMP, was to collect and analyze the project’s realized risks to lead to conclusive recommendations. Per the PMP, any new risks identified will be added to the risk register for continuity. Overall, the PM risk management tools used in this project were effective. The risk management plan provided a process to explore root causes of realized risk and examine whether risk mitigation and responses were adequate for this project. During the

execution phase, two risks were realized and three new risks were identified. These were documented in accordance with the PMP. The following excerpt from the project risk register includes an evaluation of the effect of realized risks to project execution and final deliverables.

WBS	Risk ID #	Risk Name	Description of Risk	Effect on Scope	Effect on Cost	Effect on Duration	Likelihood 1=not likely 3=likely 5=very likely	Impact 1=negligible 3=Marginal 5=significant	Risk Level (L * I) 1-5 = Low 6- 9 = Mod 10+=High	Response Type (e.g. Mitigate, Transfer, Accept, etc.) and specific actions to be taken	Risk Level AFTER Mitigation (L * I) 1-5 = Low 6- 9 = Mod 10+=High	Actual Effect
6.2.17	R7	Research insubstantial	Initial research and survey results may be academically insubstantial			Extend duration	1	2	2	Accept; risk response: 3 days of additional surveys and scholarly work	2	This task resulted in over allocated resources. PM accepted overtime.
ALL	R8	Event date change	Date may change due to key stakeholder availability	Changing reqmts			3	4	12	Mitigate: establish firm date during planning phase Accept: change requirements and modify schedule accordingly	5	Removed deliverable "Event"

#### Exhibit 4 - Realized Risks

#### Deliverables in Detail

In addition to the project’s academic deliverables for Capstone Courses 6868A and 686B, the project included ten major product deliverables. They were: an event checklist, event flyer, public relations talking points, scheduling three radio/TV interviews, event invitation, new donor “VIP” mailing list, and silent auction donations and a donor list, reserving event location, soliciting seven storyteller volunteers, and conducting event planning meetings. In addition to these original deliverables, the final product list included a Facebook event page with an online ticket purchase setup as part of the marketing tasks. All of these items, along with project narrative, will be provided to AIJ in a hard-copy continuity binder and all digital files on a CD. These product deliverables can be found in this report’s appendices.

The first step taken to create and refine these product deliverables was to consult the AIJ continuity binder from their other major annual fundraising event, called Mind Games. The event is held each fall. It raised over \$14,000 in funds in 2015 and is one of the organization’s major revenue streams for non-grant funds that provide flexible operational and maintenance funding. The continuity binder contained notes from planning meetings, an advertising flyer, a team registration flyer, a donor credit card payment sheet, a to-do list similar to a checklist, a thank you letter template, an excel list of previous door prize donors, and copies of donation request forms from previous donors. The continuity binder did not contain conventional project management tools such as a written plan, scheduling product, milestones, stakeholder matrix, requirements traceability matrix, or risk register.

The next step was to begin creation of each deliverable according to the schedule. Each deliverable is explained in further detail below.

## Event Checklist

The first deliverable was to create an event checklist to assist in execution of future annual events. This product was initiated at the start of the execution phase and evolved into a complete checklist within two months. Input to checklist content came from the project schedule, project narrative, AIJ's notes from previous events, and the PM's experience with prior event planning. There were no major issues producing the checklist, it was produced according to plan, and AIJ stakeholders informally accepted the product at a planning meeting.

## Event Flyer

The task to create an event flyer was one of the first project tasks, as the product was needed to support donation solicitation and marketing tasks. The flyer was informally approved by AIJ stakeholders via email prior to posting online and in local business locations. AIJ stakeholders provided minor feedback to improve content and layout of the event flyer. The flyer template idea was created following the PM's exploration of other event templates on line. This product was produced according to plan.

## Public Relations Talking Points

The public relations talking points to be used by AIJ stakeholders for media interactions were initially intended to include AIJ client story highlights. However, after several AIJ stakeholders advised the PM that it would be difficult to obtain client permission to use personal stories, the PM adapted the content of the talking points to include a 30-second public service announcement format (Alaska Broadcasters Association, 2016) and numerous statistics from the January 2014 American Immigration Council regarding Alaska immigrant economic statistics. The talking points task fell slightly behind schedule awaiting the completion of other marketing tasks, including the addition of an event Facebook page.

## Schedule Three Publicity Events

The task to schedule at least three marketing/publicity events fell approximately three weeks behind schedule awaiting input on product content from AIJ stakeholders. Specifically, the PM needed to coordinate which radio and TV media outlets were preferred and would be most beneficial to AIJ. The final decision was to request media coverage from Alaska Public media, Anchorage Press, and the KTVU and KTVA television outlets. The first two media entities agreed. The PM also added a publicity task to the schedule after gathering from several experienced stakeholders that Facebook was an effective way to advertise. Although the PM faced a steep Facebook learning curve, the task was added and resource work hours adjusted to accommodate the addition, rather than re-baseline the schedule. The Facebook media paid huge dividends, as it was the primary mode of advertising for the event and provided an easy way to control ticket sales through a Brown Paper Tickets account linked to Facebook. In addition, the PM posted periodic reminders on Facebook to purchase tickets, which appeared to generate additional attention to the event. The PM highly recommends this social media marketing method be used for future fundraising event publicity.

## Invitations

The event invitation product approved by AIJ stakeholders was a straightforward adaptation of the event flyer with minor modifications to be used as a mailed invitation. This product was produced according to plan.

## New Donor Mailing List

The new donor mailing list task was intended to expand AIJ's potential donor base by including new Anchorage community leaders in the invitation mailing list. This product was not well defined in the PMP, as the PM needed to brainstorm with the project sponsor numerous times to identify sources of new donors. The brainstorming ultimately resulted in the PM compiling mailing addresses from online sources of board members of both the Anchorage Downtown Partnership and Anchorage Economic Development Corporation. This was a solid list of community leaders. However, during an informal product quality review, AIJ stakeholders requested email addresses instead of mailing addresses to save on costs. The ill-defined product requirements resulted in time-consuming rework to compile email addresses from online sources. Approximately one-third of the email addresses could not be found in the public domain. This product required more thorough requirements definition during the planning phase.

## Event Location

The venue planning tasks were designed to choose and reserve event location. After investigating UAA and commercial venues, the final event location was TapRoot. The project narrative and event contact list should be reviewed by future event planners, as it contains the costs of all venues explored and will help the decision-making process. Recommendations for several key stakeholders helped the PM with the final reservation decision. This product was produced according to plan.

## Solicit Seven Storytellers

In the original project plan, this task was to solicit some type of undefined entertainment for a fundraising event. The project executive sponsor suggested changing the nature of this deliverable into the solicitation of seven local immigrant volunteers to present their story for seven minutes each during event night. The executive sponsor's motive was to improve community understanding of AIJ's mission and enhance the consideration of potential donors. The PM considered this a brilliant evolution of this product. Upon advice of an AIJ cofounder, the PM met with two people previously experienced in Arctic Entries and another similar fundraiser. These two experts assisted the PM with the storyteller practice and greatly enhanced the quality of this product. The final product requirements will be the standard for future "Beyond Borders" fundraising events.

## Silent Auction Donations and Donor List

The tasks supporting solicitation of 25-30 donation items for the event silent auction started immediately during project execution. The PM used a donor letter template from AIJ and selected target donor businesses after several discussions with AIJ stakeholders. This product was produced slightly behind schedule, as it took several email and phone follow-ups with each business. The donor contact list is a solid starting point for future events.

## Conduct Planning Meetings

The PM worked with an informal AIJ fundraising committee to hold three volunteer planning meetings leading up to event. The PM used the newly created event checklist to address required meeting topics and anything discussed that was not on the original checklist was added to it. This product was produced according to plan.

Overall, the PMP, MS Project schedule, and focus on selected knowledge areas were essential to the success of these deliverables. Specifically, the PM would have had a difficult time managing resource allocation--the PM's own labor--without MS Project to help deliver so many new and elaborate deliverables. There are noted lessons learned, as discussed above, where the PMP should have included more robust explanations of processes and requirements. However, the PM's analysis indicates that these tools contributed to the success of this project.

## Mature Non-profit Interviews

The interview portion of the project was applied as a risk response measure following the assessment that current research was not substantial enough to validate the research problem statement. Prior to adding the interviews, research consisted of a literature review, discussions with AIJ, a subjective evaluation of project management tools used during project planning and execution, and an assessment of product deliverables. The risk response measure was originally designed to be a survey sent out to local non-profits. However, after researching lists of non-profits through the Internal Revenue Service database and Alaska Labor Department database, the PM realized surveys would have required extensive time to pinpoint non-profit contact information and email addresses to which to send the survey. The time required would have exceeded the 12 hours allotted in the schedule for the risk response and, according to other project managers with survey experience, the results would likely be insubstantial.

In addition, an academic stakeholder recommended expanding the research to determine the significance (the "so what") behind asking non-profits how familiar they are with project management tools. Refining the original survey questions created during the project planning phase addressed this concern through questions designed to determine what management tools they use, why, and how the tools they use help meet their perceived organizational purpose. The refined interview questions also attempted to determine what mature non-profits are trying to accomplish with their management tools and whether sustainability or viability are their non-profit objectives.

Research was then formally expanded to include interviews with a handful of mature non-profits. The subjects were established, reputable Anchorage non-profits. Seven total non-profits were solicited for interviews, with a 71% response rate, resulting in five total respondents. Upon the recommendation from one of the non-profit leaders interviewed, one non-profit fundraising consultant was included as an additional interviewee. An interview with Rasmuson Foundation was also scheduled but later cancelled since Rasmuson does not conduct fundraising projects. All of the interviews were approximately 20 minutes in person or via telephone.

### Alaska Institute for Justice

Robin Bronen, Executive Director of Alaska Institute for Justice, was interviewed in person and over the phone at various times during project planning and execution. The mission of AIJ is to protect the civil and human rights of all Alaskans through legal services, policy, and education. AIJ employs less than 25 employees and has been in operation for 11 years. The Executive Director was a co-founder of AIJ. She was not familiar with Project Management Body of Knowledge (PMBOK) concepts and does not currently use PMBOK tools or techniques to manage fundraising projects. When starting a major fundraising project, the expected outcome is complete success. She stated her organization is open to new skills to increase efficiency, improve decision-making, and provide repeatable results. She also noted that a fundraising challenge unique to Anchorage is that special populations with unique requirements, such as immigrants, are not always taken into account when citizens choose which non-profit services to support in the community.

### Anchorage Neighborhood Health Center

Tammy Green, Chief Executive Officer (CEO) of Anchorage Neighborhood Health Center (ANHC) was interviewed via telephone. The mission of ANHC is to improve wellness by providing high quality, compassionate healthcare regardless of ability to pay. Its vision is to address the unmet primary health care needs of the community. ANHC employs 160 personnel and had been in operation for over 20 years. The CEO was somewhat familiar with PMBOK concepts but does not currently use PMBOK tools or techniques to manage fundraising projects. She stated she would welcome new skill sets related to project management best practices and that she was currently in the process of evaluating what ANHC was accomplishing across development (synonymous with fundraising and marketing). The budget constraints are a unique challenge to Anchorage non-profits. Because the healthcare environment is an ever-changing management challenge, the CEO expressed a desire to integrate project management tools and change management concept to holistically deal with resistance to change, particularly culture change. In addition, Ms. Green recommended contacting the former Bean's Café Development Director, now a non-profit fundraising consultant, for additional perspective on project management tools in non-profits.

### Arc of Anchorage

Clara Sanderson, Senior Public Relations Officer and Chief Marketing and Development Officer for the Arc of Anchorage, was interviewed via telephone. The Arc of Anchorage is a chapter of the Arc of the United States. Its mission is to encourage and celebrate the potential of people who experience disabilities. Its vision is to be a community that recognizes and embraces people of all abilities. The Arc employees approximately 400 personnel, including 140 full-time employees, and it has been in operation for 60 years. Ms. Sanderson was somewhat familiar with PMBOK concepts but due to the development plan being in revision, does not currently use PMBOK tools to manage and control fundraising projects. However, she stated that a written plan for each project and a resource assignment matrix template will be part of their toolkit in the future. The Arc leadership is open to new project management skill sets and they will consult with Foraker Group in the future. Regarding Anchorage-specific challenges, Ms. Sanderson listed the oil economy pinch, the saturated fundraising market, and the reliance on the

Permanent Fund Dividend (PFD) for Pick, Click, Give campaign and the PFD's uncertain future. Her additional recommendations included a desire for more research on the generational gap contributing to the age 16-39 group often being disregarded as potential donors, more research on development challenges and how to target said demographic with creative and social media tools.

### Catholic Social Services

Lisa Aquino, Executive Director of Catholic Social Services (CSS), was interviewed in person. CSS is a service arm of the Diocese of Anchorage. Its mission is to provide help and create hope by compassionately serving the poor and those in need, strengthening individuals and families, and advocating for social justice. Its vision is to fulfill the social teachings of the Catholic Church through efforts to mend the holes in society's safety net, alleviate suffering and promote social change by meeting basic human needs and offering thoughtful opportunities for life changing growth. CSS employs less than 100 employees and has operated in Anchorage for 50 years. Ms. Aquino was somewhat familiar with PMBOK concepts and CSS uses a written plan and stakeholder engagement tools to manage and control fundraising projects. She stated that management structure and tools were critical in the organization, as it operated eight different programs that could each be its own non-profit organization. She also stated that CSS is open to new project management skill sets but that the development team is experienced. She also noted that her organization relies on large, regular events such as an annual charity ball and that they conducts very few fundraising events because they are not the most effective way to raise funds. Because CSS is such an established, mature organization, they use quality indicators and metrics to gauge the organization. However, they often do not have the extra capacity for innovation and change and could use tools and techniques to help create that space for innovation. Regarding Anchorage-specific challenges, Ms. Aquino noted that they have a good connection through the Church but that they still compete in a limited pool of donors.

### Foraker Group

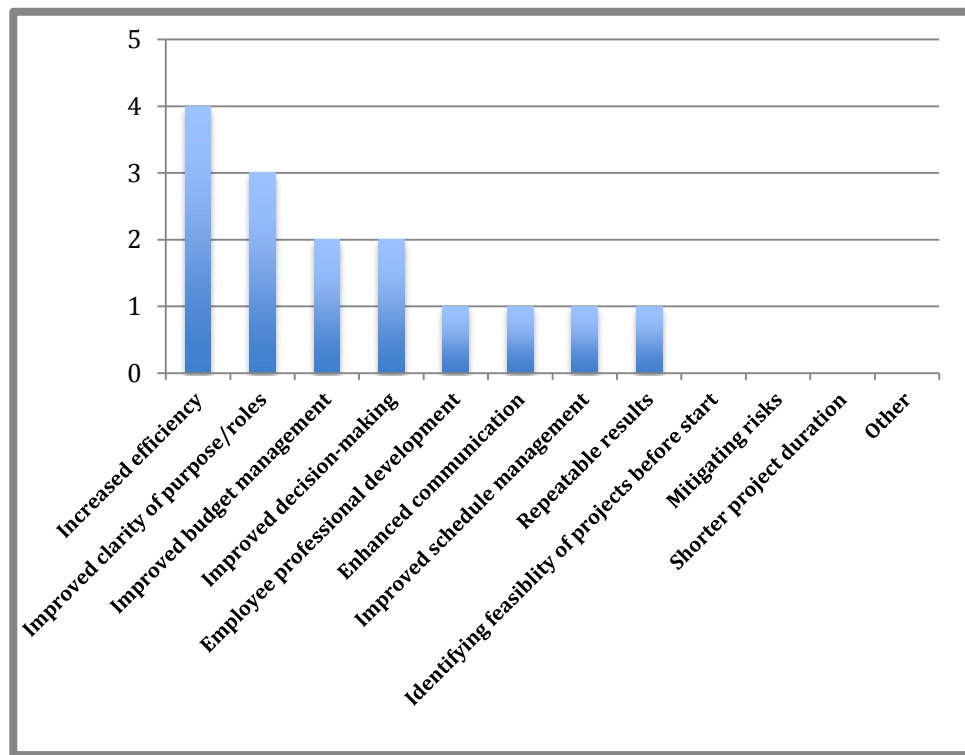
Andrew Cutting, Director of Research for the Foraker Group, was interviewed via telephone. Foraker Group's core purpose is to strengthen Alaska's nonprofit sector. We are dedicated to increasing the leadership and management skills of professionals and volunteers working in Alaska's nonprofit and tribal organizations through an innovative approach focused on a nonprofit sustainability model. Foraker employs less than 100 personnel and has operated in Anchorage for 15 years. Although not familiar with PMBOK concepts, Foraker recommends the use of written plans and risk management plans to non-profit partner and when undertaking relationship building projects with partners. While not necessarily unique to non-profits, Mr. Cutting noted that rural communities present particular challenges. In addition, he noted that one of the biggest challenges faced by non-profits is lack of capacity to adopt improvements and innovations. Funding drives the behavior of non-profits, but due to lack of time and capacity, these organizations generally run highly efficiently and accomplish what needs to be done to function. But longer sustained processes are a struggle.



### Denali Fundraising Service Provider (FSP)

Ken Miller, founder and president of Denali FSP, was interviewed in person. Denali FSP is a non-profit fundraising consulting firm that provides best practices website design, contract and interim fundraising, and fundraising training and coaching. He stated that there are four main types of fundraisers in non-profits: annual campaigns, major donor programs, special events, and capital campaigns. He expressed that there are few fundraising projects needing project management tools or even a checklist due to their small scale. However, he emphasized that planning is important and that project management tools are useful to large capital campaigns, such as construction and sustainment of a new building. In fact, these types of campaigns already utilize common project management tools like feasibility studies, fiscal reports, planning, construction, operational turnover, and sustainment. He also provided information on the Alaska Community Foundation grants that are available to help non-profits with fundraising. In addition, he provided valuable advertising and marketing recommendations for the AIJ fundraising event.

Each of the interviewees was asked to identify their top three results that would provide the most benefit to their organization in regards to managing and controlling projects. The results are depicted in the table below.



**Exhibit 5 - Chart of Desired Results**

This chart demonstrates that increased efficiency is the most desired result when managing and controlling projects. The interview question specifically omitted “fundraising” as a project identifier to expand the possible application of this question’s results.

These interviews provided valuable research insight. They demonstrated the most of these organizations operated at project management maturity levels that included repeatable and documented processes, although they were not necessarily implementing PMBOK tools. Several of these organizations demonstrated an organizational maturity level considered comprehensive, where they routinely used quantifiable information to evaluate their management processes and came very close to the most mature operating level indicated by a continuous improvement culture. The interviews corroborated the literature review findings that non-profits are generally familiar with PMBOK concepts and other business lingo. Although these organizations do not tend to utilize traditional project management tools such as project management plans or scheduling software, some of their tools and techniques currently in use are akin to PMBOK tools. This includes written plans and assignment matrices. This data supports the notion that non-profits would adopt user-friendly project management tools with a little training and they would welcome the addition of PMBOK tools to their organizational process assets.

## Research Results

Based on the project success, interviews, and current literature, non-profits would benefit from utilizing the project management tools used in this project to create a new fundraising event plan. This comes with an important caveat, that these organizations would likely require preliminary training or experienced employees to use some of the more sophisticated and involved tools like a fully realized PMP and MS Project. And, as identified by a non-profit consulting expert, most smaller projects do not require complex project management tools to be successful.

The project management tools most useful to a new project depend on several factors. The greater the scale and complexity of a project, the more a PMP and scheduling software contribute to project success. If the organizational culture is open to innovation, they will likely be open to project management best practices. Throughout the literature review and interviews, non-profit leaders expressed a desire for organizational efficiency. A charter, a short template that lays the foundation for scope and project objectives, is a fundamental tool non-profits should adopt, regardless of size or nature of the project. A charter would contribute to organizational efficiency and the other leading sought-after project results, including clarity of purpose and improved decision-making. In addition, a charter template would be an intuitive tool that does not require training. A resource assignment matrix template, already in use in one of the non-profits interviewed, is also an intuitive tool that would assist non-profit leaders in their management of scarce resources.

Two of the experts interviewed noted that the nature of the non-profit model means that most non-profits consistently operate on the margins, dependent on donations, grants, and government funding, often dependent on volunteers, and usually having to manage overtasked employees. This means that non-profit leaders surmise that there is not a lot of opportunity or funding to implement process improvement. Although this new fundraising event plan required the equivalent of part-time employment hours for one project manager to plan and execute to completion, the simpler tool templates like a charter and assignment matrix will pay dividends, take little to no training to use, and will enhance organizational maturity.

There is clearly a desire from non-profit leaders to improve their management processes, corroborated through the PM's experience with this project, the literature review, and the interview results. Local PMI chapters have an opportunity to provide introductory guidance to non-profits in the form of short presentations suitable for a luncheon, similar to the presentation created by the Puget Sound PMI chapter. There is also an exceptional opportunity for university graduate students to pair their education requirements with non-profit needs. This project is a case in point. The student PM gained a greater depth of understanding project management principles and methodology while providing useful fundraising event products to a local non-profit.

## **Conclusions**

Local non-profits do not currently use common project management tools to successfully plan and execute new fundraising events or to create fundraising products and continuity documents. Using this AIJ fundraiser “Beyond Borders” as a case study, the researcher validated that a project management plan, scheduling tools, and a focus on several PMBOK knowledge areas are effective tools to plan and execute a novel small-scale fundraising event. The tools also assisted the PM in generating quality product deliverables.

There is a lack of project management familiarity, training, and research in the non-profit sector, as validated across non-profit literature and interviews with several well-established non-profit organizations. There is also a distinct opportunity to capitalize on non-profits’ desire for improved efficiency by demonstrating the benefits of project management tools through training, further research, and collaborative efforts between non-profits and project management students.

## **Recommendations for Further Research**

There is an extreme lack of literature or resource data related to the use of project management tools in non-profit organizations. This presents an ideal opportunity for further research that explores how project management tools and training can improve non-profit operational efficiency and what types of tools are best implemented across the range of simple to complex projects. Several non-profit leaders also voiced a need for tools to assist with integrated change management and leading culture shifts. There is also an opportunity to research the use of project management tools that support creative social media to target specific demographics, tools to assist in the general shortage of time and resources to implement improvements, and tools that make space for innovation. In addition, local resources like PMI chapters, consultants, and graduate students have an opportunity to collaborate with non-profits to research and demonstrate the advantages of project management practices while meeting the needs of their non-profit partners.

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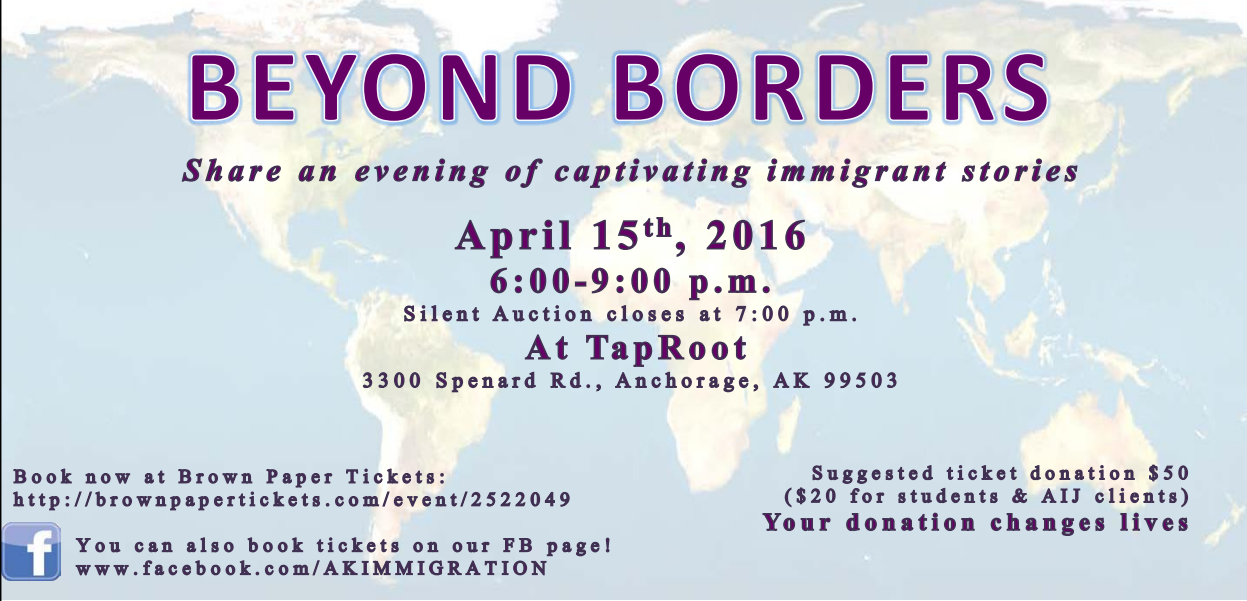
## Appendix A - Event Planning Checklist

This event planning checklist is located in the Product Deliverables digital folder in subfolder Checklist and Contact Lists as worksheet Event Checklist in the Excel file “AIJ Spring Fundraiser Event Checklist and Contacts.”

TIME FRAME	ITEM	PERSON RESPONSIBLE	DATE COMPLETE	REMARKS
6 Months Out	Establish event theme/name			Beyond Borders 2016
	Define key event elements			See AIJ Fundraiser Description word doc
	Establish event date and timeline			Spring
	Confirm event budget			Venue charge, printing capabilities
	Start searching for volunteer storytellers			See Event Contacts worksheet
	Book location			See Options in Event Contacts worksheet
3 Months Out	Coordinate location, event liability insurance if required			Required for AJAA
	Coordinate location special requirements			Audio/visual/video
	Ensure adequate event parking			Food/drink
				Stage
				Silent Auction Setup
2 Months Out	Create event flyer			See Event Flyer folder
	Distribute silent auction letters to donor locations			See Donation Request Letter template and Auction Donor List worksheet
	Set up event page on AIJ Facebook			See Folder
	Set up Brown Paper Tickets page			Variable price option with suggested donation of \$50-\$20 for students/clients
	Distribute FB page link			See Digital Advertising Sites worksheet
	Begin AIJ fundraising committee meetings			Invite interested board members, AIJ employees; meet to discuss details
1 Month Out	Event planner start mailing AIJ committee every 2-3 weeks on project status			
	Recruit volunteers			Emcee Photo/videographer (1 volunteer) Setup/tear down (2 volunteers) Event night entry table (3-4 volunteers) Event night silent auction (4 volunteers)
	Create event invitations			See Event Invitations folder and review "VIP Invite List" worksheet
2 Weeks Out	Gather topics from storytellers			Request 2-3 sentence topic from storytellers
	Continue to recruit storytellers as necessary			See Arctic Entries concept <a href="https://arcticentries.com/2015/07/12/faq-2/">https://arcticentries.com/2015/07/12/faq-2/</a>
	Print and mail event invitations			
	Print flyers and physically distribute			See VIP Invite List worksheet
	Schedule radio interviews for Exec Director, AIJ volunteers			
	Follow up with silent auction donors			See Auction Donor List worksheet
1 Week Out	Confirm event schedule events			
	Meet with event location contact			Discuss layout and event details
	Schedule storyteller rehearsal date for one week prior to event			Hold AIJ on room?
	Tally event attendees and post sign up reminders			
	Coordinate payment options for silent auction			Square, paypal set up at event
2 Weeks Out	Conduct radio interviews			
	Coordinate press release, additional advertising			
	Collect final silent auction donations			
	Tally event attendees and post sign up reminders			
				Work with AIJ Board Pres Emcee Photo/videographer Setup/tear down (2 volunteers) Event night entry table (3-4 volunteers) Event night silent auction (4 volunteers)
1 Week Out	Conduct storyteller rehearsal			Gather storyteller mobile phone numbers, emails for any late announcements (and bring to event night)
	Meet with emcee to discuss schedule of events, key pitches and talking points			Any special guest speakers?
	Send email to volunteers			Include how time at venue
	Create sponsor/donor poster			Silent auction donors, any other large donors to display on event night
	Final tally of event attendees			Sign up open through event date
Event Day	Print event attendee list from Brown Paper Tickets			Several copies for entry table volunteers
	Meet event night volunteers at door .5 hours prior to silent auction start			Discuss security awareness
	Set up silent auction at venue 1 hour prior to doors opening			Assign tasks: Need 2-3 volunteers; payment options at table
	Reserve VIP tables and parking at venue location			Ex: AIJ Exec Director, Mayor
	Ensure storytellers arrive 1 hour prior to event start			
	Have fun!!!!			
Post Event	Oversee tear down			
	Close out bill with venue			
	Post-event review with committee			Record lessons learned
	Consolidate all documents			Folder and digital CD
	Thank you letters			Speakers, sponsors, donors, volunteers

## Appendix B - Event Flyer

This event flyer is located in the Product Deliverables digital folder under subfolder Event Flyer.




# BEYOND BORDERS

*Share an evening of captivating immigrant stories*

**April 15<sup>th</sup>, 2016**  
**6:00-9:00 p.m.**  
Silent Auction closes at 7:00 p.m.  
**At TapRoot**  
3300 Spenard Rd., Anchorage, AK 99503


Book now at Brown Paper Tickets:  
<http://brownpapertickets.com/event/2522049>

Suggested ticket donation \$50  
(\$20 for students & AIJ clients)  
**Your donation changes lives**

 You can also book tickets on our FB page!  
[www.facebook.com/AKIMMIGRATION](http://www.facebook.com/AKIMMIGRATION)

**The Alaska Institute for Justice protects the human and civil rights of all Alaskans through legal services, policy, and education.**

*Join us for an evening celebrating our diverse Anchorage population which brings strength, economic vitality, and resilience to our community.*

  
Alaska  
Institute  
for Justice

[www.akijp.org](http://www.akijp.org)  
(907) 279-2457



## Appendix C - Facebook Page

This is a snapshot of the event Facebook page. Original files are located in the Product Deliverables digital folder under subfolder Facebook.

The screenshot shows the Facebook interface for the 'Beyond Borders - AIJ' event page. At the top, navigation tabs include Page, Messages, Notifications, Insights, Publishing Tools, Settings, and Help. The main header features a world map background with the text: 'BEYOND BORDERS Share an evening of captivating immigrant stories April 15th, 2016 6:00-9:00 p.m. Silent Auction closes at 7:00 p.m. At TapRoot 3300 Spenard Rd., Anchorage, AK 99503 Suggested ticket donation \$50 (\$20 for students & AIJ clients) Your donation changes lives'. The Alaska Institute for Justice logo is on the left. Below the header are tabs for Timeline, About, Photos, Likes, and More. The left sidebar shows page statistics: 61 likes (+18 this week), 36 post reach, and 56,000 people within 2 miles. The main content area displays a post from Carol Forner, published on March 9, with a link to the event tickets and a 'Boost Post' button. The right sidebar shows performance metrics for the week: 36 Post Reach, 26 Post Engagement, 1 Book Now, and 0 Website Clicks. It also includes a 'Promote Page' button and a 'Recent' section for 2016.

## Appendix D - Event Invitation

This event invitation is located in the Product Deliverables digital folder under subfolder Event Invitation.

**You are invited!**

We cordially invite you to attend the fundraiser  
“**Beyond Borders**” to benefit the  
Alaska Institute for Justice.

Join us for an evening celebrating our diverse  
Anchorage population which brings strength,  
economic vitality, and resilience to our community.


**BEYOND BORDERS**

*Share an evening of captivating immigrant stories*

**April 15<sup>th</sup>, 2016**  
**6:00-9:00 p.m.**  
Silent Auction closes at 7:00 p.m.  
**At TapRoot**  
3300 Spenard Rd., Anchorage, AK 99503


Book tickets at:  
<http://brownpapertickets.com/event/2522049>

Suggested ticket donation \$50

 You can also book tickets on our FB page!  
[www.facebook.com/AKIMMIGRATION](http://www.facebook.com/AKIMMIGRATION)

The Alaska Institute for Justice protects the  
human and civil rights of all Alaskans  
through legal services, policy, and  
education.

[www.akijp.org](http://www.akijp.org)  
(907) 279-2457



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## **Appendix E - VIP Mailing List**

This item is in work is located in the Product Deliverables digital folder in subfolder Checklist and Contact Lists as worksheet VIP Invite List in the Excel file “AIJ Spring Fundraiser Event Checklist and Contacts.” It will not be posted in the final research report to protect personally identifiable information.

## Appendix F - Public Relations Talking Points

This file is located in the Product Deliverables digital folder in subfolder Advertising Information as a Word document “AIJ Fundraiser Talking Points.”

### “Beyond Borders” AIJ Event Talking Points March 2016

The AIJ fundraising event “Beyond Borders” will provide local immigrants an opportunity to share their unique stories with the public. The evening centers around seven immigrants who will each present a short, personal narrative. The topics may include their particular immigration experience, how they transitioned to Alaskan life, and/or how AIJ or other community agencies have made a difference in their lives.

The intent of the overall presentation is to emphasize that our diverse immigrant population brings strength, economic vitality, and resilience to our community. The event also aims to increase awareness of the AIJ mission and generate funds for AIJ through an entry donation and proceeds from a silent auction.

The event will be held on Friday, April 15th at Taproot (3300 Spenard Rd, Anchorage)

The silent auction is open from 6:00-7 p.m.

Presentations begin at 7 p.m.

Event page listed on AIJ Facebook page at <https://www.facebook.com/AKIMMIGRATION/>

Or <https://www.facebook.com/beyondbordersAIJ>

Ticket links are found on each page.

### PSA MESSAGE FORMAT (Alaska Broadcasters Association)

ALASKA INSTITUTE FOR JUSTICE - BEYOND BORDERS FUNDRAISER

431 W. 7<sup>TH</sup> Ave  
Anchorage, AK 99501  
(907) 279-2457

CONTACT: Robin Bronen  
Executive Director

START: Immediately

STOP: April 16<sup>th</sup>, 2016

PUBLIC SERVICE ANNOUNCEMENT: 30 seconds

The Alaska Institute for Justice protects the human and civil rights of all Alaskans through legal services, policy, and education. Join us for a special event “Beyond Borders” on April 15<sup>th</sup> 2016 at 7 p.m. at TapRoot to share an evening of captivating immigrant stories. Our diverse immigrant population brings strength, economic vitality, and resilience to our community. There is also a silent auction starting at 6 p.m. showcasing items from local artist and business donors. For more information call AIJ at (907) 279-2457 or go to our Facebook page at [www.facebook.com/AKIMMIGRATION](http://www.facebook.com/AKIMMIGRATION).

### The following is from the Immigration Policy Center, January 2014 Talking Points

#### Immigrant entrepreneurs contribute to Alaska’s economy.

- From 2006 to 2010, there were 3,394 new immigrant business owners in Alaska<sup>1</sup> and in 2010, 10.1 percent of all business owners in Alaska were foreign-born.<sup>2</sup>
- In 2010, new immigrant business owners<sup>3</sup> had a total net business income of \$160 million, which is 7.8

percent of all net business income in the state.<sup>4</sup>

**Highly skilled immigrants are vital to Alaska’s innovation industries, which in turn helps lead American innovation and creates jobs.**

- Immigrants contribute to Alaska’s economic growth and competitiveness by earning degrees in science, technology, engineering, and mathematics (STEM) fields from the state’s research universities. In 2009, **33 percent** of STEM graduates earning masters or PhD degrees from these universities were foreign-born.<sup>5</sup>
- In 2011, the U.S. Department of Labor certified 141 H-1B high-skilled visa labor certification **applications** in Alaska, with an average annual wage of \$65,098,6 which is higher than Alaska’s per capita **income** of \$31,944.<sup>7</sup>
- An **expansion** of the high-skilled visa program would create an estimated 480 new jobs in Alaska by 2020.<sup>8</sup> By 2045, this expansion would **add** around \$257 million to Gross State Product and increase personal income by more than \$240 million.<sup>9</sup>

**Additional facts from research by UAA Sociology Professor Chad Farrell from a forthcoming chapter commemorating the Anchorage Centennial**

A long line of academic research indicates that exposure to diversity—via contact with members of racial groups other than our own—can engender tolerance and undermine prejudice (Allport 1954; Oliver and Wong 2003; Pettigrew and Tropp 2011; Robinson and Preston 1976; Welch *et al.* 2001). It might make us smarter as well. For instance, it introduces new perspectives and conflicting viewpoints that make us less vulnerable to the groupthink so characteristic of homogeneous settings (Levine *et al.* 2014). Diversity brings with it a vitality and dynamism. Across U.S. counties, for example, it is associated with increasing business activity including new start-ups, small business growth, and self-employment (Guettabi 2015).

Fortunately, there are those willing to do the patient work of bridge-building in our community. Aptly enough, that is the mission of the Bridge Builders of Anchorage, whose goal is to “build a community of friends among all racial and cultural groups in Anchorage.” Additionally, the Municipality of Anchorage has partnered with the Anchorage Economic Development Corporation, local businesses and organizations to join the Welcoming Cities project, a coalition of U.S. cities seeking to promote the economic, cultural and social contributions of immigrants and refugees. Catholic Social Services continues to play a crucial role in this effort through its Refugee Assistance and Immigration Services. In addition to providing a host of legal services, the Alaska Institute for Justice trains language interpreters for work in government, business and service organizations. To date it has trained over 200 bilingual Alaskans fluent in 40 languages including Albanian, Danish, Hmong, Samoan, Spanish, Swahili, Tagalog, and Yup’ik, to name a few. At my own university the UAA Multicultural Center strives along with other university organizations, faculty and student groups to engage the local community and create a welcoming, inclusive campus. The Anchorage Museum continues its mission to commemorate our distinctiveness while also linking us to a broader, interconnected world. The list goes on.

A century after its founding, Anchorage finds itself at the intersection of an assortment of economic, demographic, and cultural forces, some of which are unique to our state while others are global in scope. As a consequence, Anchorage is at the vanguard of America’s diversity trend. This presents us with many tremendous opportunities and some significant challenges as well. As the nation embarks on a new demographic era, our community’s legacy will be determined in large part by our successes and failures on this front.

## Appendix G - Marketing Contact List

This item is located in the Product Deliverables digital folder in subfolder Checklist and Contact Lists as worksheet Ad Locations in the Excel file "AIJ Spring Fundraiser Event Checklist and Contacts."

PLACES TO ADVERTISE EVENT INTERNET	URL/EMAIL/CONTACT	REMARKS	DATE SUBMITTED/POSTED
Anchorage Economic Development Corporation	<a href="http://aedcweb.com/about/contact/">http://aedcweb.com/about/contact/</a>	Request to list on events page under contact notes option	Mar 26th
Catholic Social Services	<a href="https://www.cssalaska.org/get-involved/upcoming-events/Kara-Casanova-Community-Engagement-Manager">https://www.cssalaska.org/get-involved/upcoming-events/Kara-Casanova-Community-Engagement-Manager</a> kcasanova@cssalaska.org	Request to post on event calendar	Mar 26th
Bridge Builders of Anchorage	<a href="http://bridgebuildersak.org/events/">http://bridgebuildersak.org/events/</a> bridgebuildersofanchorageak1@gmail.com	Request to post on events page	Mar 26th
UAA Multicultural Center	E. Andre Thorne Director eathorn@uaa.alaska.edu <a href="https://www.facebook.com/UAAMulticulturalCenter">https://www.facebook.com/UAAMulticulturalCenter</a>	Ask to post on their FB page	Mar 26th
Alaska Dispatch News	<a href="http://www.adn.com/events#/1/+AddEventsButton">http://www.adn.com/events#/1/+AddEventsButton</a>	Must register to post event	Mar 15th
Anchorage Rotary Club	<a href="http://anchagerotary.org/">http://anchagerotary.org/</a>	Send contact request via site	Mar 15th
Welcoming Anchorage	<a href="http://www.muni.org/Departments/Mayor/WelcomingAnchorage/Pages/Default.aspx">http://www.muni.org/Departments/Mayor/WelcomingAnchorage/Pages/Default.aspx</a> WelcomingAnchorage@muni.org	Sent email to post under weekly news	Mar 26th
Anchorage.net visitor page	<a href="http://www.anchorage.net/events/submit-an-event/">http://www.anchorage.net/events/submit-an-event/</a>	Online form	Mar 15th
Alaska Public Media calendar	<a href="http://alaskapublic.org/calendar">alaskapublic.org/calendar</a>	Online form	Mar 26th
Anchorage Press	<a href="http://www.anchoragepress.com/">http://www.anchoragepress.com/</a> <a href="http://www.ktuu.com/features/eventscalendar#/99503-anchorage/all/today">http://www.ktuu.com/features/eventscalendar#/99503-anchorage/all/today</a>	Already listed via Alaska Dispatch News event	NA
KTUU	<a href="http://www.ktuu.com/features/eventscalendar#/99503-anchorage/all/today">http://www.ktuu.com/features/eventscalendar#/99503-anchorage/all/today</a>	Online form	Mar 26th
KTVA		Does not have calendar event	NA
Craigslist Community Page	<a href="https://anchorage.craigslist.org/search/eve">https://anchorage.craigslist.org/search/eve</a>	Submit to events	Mar 26th
PLACES TO ADVERTISE EVENT RADIO	CONTACT	REMARKS	
Radio PSA	<a href="http://www.alaskabroadcasters.org/service/PSATipsNonProfits.html">http://www.alaskabroadcasters.org/service/PSATipsNonProfits.html</a>	Link provides excellent advice	
Public Radio KSKA	News tips: 907-550-8444; send email explanation to news@alaskapublic.org or lockyer@alaskapublic.org	See email request, note Robin is traveling through April st	Emailed 24 Mar
Ch 2 News KTUU	Send story ideas to news@ktuu.com, news director tsabo@ktuu.com		Emailed 24 Mar
Ch 11 News KTVA	News tips to 11news@ktva.com, news director rudman@ktva.com		Emailed 24 Mar
PLACES TO ADVERTISE EVENT BILLBOARDS	CONTACT	REMARKS	
Carrs			
Fred Meyer			
Kaladi Brothers			
Starbucks			
Alaska Club		Call for billboard locations	
Snow City Café			
Gold Rush Liquors			
Arts Center			
Libraries			
Spnard Builders Supply electronic billboard	Jarrod Regge		
Anchorage Museum			
Local bookstores			
Churches, mosques, synagogues			
Anchorage Youth Development Coalition	Called "Que Pasa" @ <a href="http://aydc.org/">http://aydc.org/</a> , Debra Williams Exec Dir		
Health Literacy	Jeni Rogers		
UAA Career Counseling		Call for permission to post on boards	

## Appendix H - Silent Auction Donor List

This item is located in the Product Deliverables digital folder in subfolder Checklist and Contact Lists as worksheet Auction Donor List in the Excel file “AIJ Spring Fundraiser Event Checklist and Contacts.”

NAME	ADDRESS	CONTACT INFO	REMARKS
Stephan Fine Art Gallery	Hotel Captain Cook 939 West 5th Ave Anchorage, AK 99501 907-274-5009	stephanfinearts@yahoo.com beckysfa@yahoo.com	Letter delivered 26 Feb
Sevigny Studio Alaska Art	608 West 4th Ave, Ste 101 Anchorage, AK 99501 907-258-2787	katiesevignyart@yahoo.com	Letter delivered 26 Feb
Artique Limited	314 G Street Anchorage, AK 99501 907-227-1663	artique@artiqueid.com	Letter delivered 26 Feb Birdsall Watercolor received (value \$113)
Aurora Fine Art Gallery	737 West 4th Ave #150 Anchorage, AK 99501 907-274-0234	907-274-0234	Letter delivered 26 Feb
Arctic Rose Gallery/Boheme Coffee Shop	1443 West Northern Lights Blvd Anchorage, AK 99503 4315 Diplomacy Dr.	907-279-3911	Letter delivered 26 Feb
Alaska Native Medical Center Craft Shop	Anchorage, AK 99508 341 E Benson Blvd Anchorage, AK 99503	907-729-1122 907-277-4040	Letter delivered 26 Feb Wood rolling pin (value \$185)
2 Friends Gallery	3555 Arctic Blvd C5 Anchorage, AK 99503	907-563-2787	Letter delivered 26 Feb
blue.hollomon gallery	1317 West Northern Lights Blvd, Ste 3 Anchorage, AK 99503	907-569-6800	Letter delivered 26 Feb
Dos Manos Gift Shop	7801 School Street Unit C Anchorage, AK 99518	clayowenstudios@live.com 907-343-9551	Letter delivered 26 Feb
Clay Owen Studios (Autumn Petlow)	3502 Arctic Blvd Anchorage, AK 99503	907-562-6666	Letter delivered 26 Feb Print received (value \$250)
Deidre's Fine Art Gallery	4417 Old Seward Hwy Anchorage, AK 99503	907-563-3877	Letter delivered 26 Feb Print received (value \$150)
Alaska Fur Exchange	751 E. 6th Ave, Ste 113 Anchorage, AK 99503	info@unwindedalaska.com 907-644-8463	Letter delivered 26 Feb
UnWined (gift basket)	530 E Benson Blvd, Ste 5 Anchorage, AK 99503	cheers@labodegastore.com 907-569-3800	Letter delivered 26 Feb
Labodega Wine Club membership (gift basket)	11109 Old Seward Hwy, Ste 2 Anchorage, AK 99515	907-337-9463	Letter delivered 26 Feb
Wine Styles (gift basket)	1320 Huffman Park Dr #170 Anchorage, AK 99515	907-677-9050	Letter delivered 26 Feb
Anchorage Wine House (gift basket)	3203 West 4th Ave #258 Anchorage, AK 99501	907-646-1100 anchorage@oilandvinegarusa.co	Letter delivered 26 Feb
Oil & Vinegar (gift basket)	3203 West 4th Ave Anchorage, AK 99501	907-257-1900	Letter delivered 26 Mar Need to contact Apple online
Apple Store 5th Ave Mall	3203 West 4th Ave Anchorage, AK 99501	907-274-0139	Letter delivered 26 Mar
Lush	3203 West 4th Ave Anchorage, AK 99501	907-770-0922	Letter delivered 26 Mar
Once in a Blue Moose	5225 Unalut Street Anchorage, AK 99518	907-562-8858 907-258-1122	Letter delivered 26 Feb
Alaska Wild Berry Products	142 West 4th Ave Anchorage, AK 99501	info@allurehairdesign.com	Letter delivered 26 Feb
Allure Day Spa	404 East Anchorage, AK 99501	907-222-3601	Letter delivered 26 Feb
Adagio Day Spa (Anastasia Gudimova)	12003 West Northern Lights Blvd, Ste A Anchorage, AK 99503	907-272-4565	Letter delivered 26 Feb
REI Anchorage Store	11401 Old Glenn Hwy Eagle River, AK 99577	907-694-5475	Letter delivered 26 Mar
Picture This	17026 Santa Maria Dr Eagle River, AK 99577	907-694-3978	Letter delivered 26 Mar
Mile 5, 2 Greenhouse and Gift Shop	11421 Old Glenn Hwy Eagle River, AK 99577	907-694-5956	Letter delivered 26 Mar
Artworks Gallery and Glass	12303 West 4th Ave Anchorage, AK 99503	907-222-1560 Non-profit donation coordinator: Cortney Foos cortney.bearmoose@gmail.com	emailed 26 Mar (note, they may already donate to Mind Games) Will send \$50 gift certificate. Recommend using as thank you to event musician.
Bear Tooth Theatrepub			
Local Travel and Tour Companies			
Local Chefs			
<b>Other Ideas</b>			
Alaska Airlines Voucher			Need to apply 90 days out
Ryan Air Voucher			
Bailiwick	CLOSED		
Alaska Ivory and Native Crafts	HOMER		
Alaska Center for the Performing Arts (event tickets)	NON-PROFIT		
Glacier Brewhouse/Orzo			
Simon and Seaforts			
Marx Bros Cafe			
Asian Markets and Gift Shops			
UAA Student Artists			

## **Appendix I - Venue and Storyteller Contact List**

This is located in the Product Deliverables digital folder in subfolder Checklist and Contact Lists as worksheet Event Contact in the Excel file “AIJ Spring Fundraiser Event Checklist and Contacts.” It will not be posted in the final research report to protect personally identifiable information.



## Appendix J - Mature Non-profit Interview Questions

### Interview Protocol:

The researcher, a graduate student in the UAA Masters of Science in Project Management program, will use this interview to address the research thesis: Local non-profits apply PM tools to successfully execute and repeat fundraising events. It will attempt to answer the following questions: How familiar are Anchorage non-profits with project management tools and competencies? Could local non-profits benefit from and are they amenable to a local Project Management Institute chapter outreach to help non-profit organizations meet their goals and manage their projects more efficiently?

### Interview Questions:

1. What is the size of your non-profit or not-for-profit organization?
  - a. Less than 25 employees
  - b. 25-100 employees
  - c. Over 100 employees
2. How many years has your organization been in operation?
  - a. Less than 10 years
  - b. 10-20 years
  - c. More than 20 years
3. What is the mission of your organization?  
(If it is available on website researcher will pull the data)
4. How long have you been with your organization?
5. How familiar are you with Project Management Institute best practices and Project Management Body of Knowledge (PMBOK) concepts (integration, scope, time, cost, quality, HR, communications, risk, procurement, stakeholder engagement). (Choose one)
  - a. Very familiar
  - b. Somewhat familiar
  - c. Not familiar
6. What organizational tools do you currently use to manage/control fundraising projects? (check all that apply)
  - a. Recurring meetings
  - b. Checklist
  - c. Scheduling software (such as MS Project or Primavera)
  - d. Continuity binder/files
  - e. Written plan
  - f. Risk management plan
  - g. Project Management Body of Knowledge (PMBOK) tools (integration, scope, time, cost, quality, HR, communications, risk, procurement, stakeholder engagement)
  - h. Improvised tools depending on nature of project
  - i. Sometimes we wing it
  - j. Other \_\_\_\_\_
7. Do the tools selected above help you to successfully meet your organizational purposes/goals? Why or why not?
8. When starting a major fundraising project, what is your most common estimated outcome? (choose one)
  - a. Complete success
  - b. Challenged (late, over budget, without desired characteristics)
  - c. Cancelled
9. Which of the results listed would provide the most benefit to your organization in regard to managing and controlling projects? (choose top three)
  - a. Enhanced communication
  - b. Increased effectiveness/efficiency
  - c. Improved budget management
  - d. Improved schedule management
  - e. Improved decision-making
  - f. Improved clarity of purpose/roles

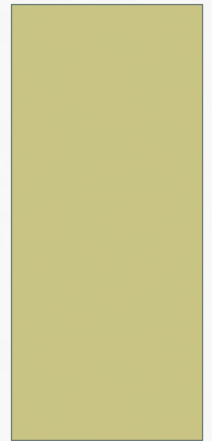
- g. Shorter project duration
  - h. Repeatable results
  - i. Mitigating risks
  - j. Identifying feasibility of projects before starting them
  - k. Employee professional development
  - l. Other \_\_\_\_\_
10. Would you welcome project management best practices or organizational ideas to help manage your projects more efficiently?
- a. No, we operate at a highly functional level already
  - b. Maybe, but we'd like to know more about project management first
  - c. Yes, we are always open to new skill sets
11. Does your organization have any formal training geared toward managing fundraising or other projects?
12. Are there any fundraising challenges unique to Anchorage?
13. Additional comments or recommendations for further non-profit management research:



# NON-PROFIT FUNDRAISING EVENT PLAN

AN AIJ PROJECT

C. FORNER, PM 686B SPRING 2016



# THE OPPORTUNITY

- Provide a repeatable fundraising event for local non-profit Alaska Institute for Justice (AIJ)
- Raise AIJ mission awareness through project
- Demonstrate mastery of PM skills, processes, and tools

# WHO & WHAT IS AIJ?

- Why I sought out AIJ
- Only state agency to provide low-fee services to immigrants and refugees
- Clients are of various backgrounds
  - Fleeing persecution
  - Victims of domestic violence
  - Isolated, low-income
- Annual revenue
  - Grants—specialized services
  - Small fee revenue
  - Donations – less than 1% of total annual revenue



# PROJECT BENEFITS

***“AIJ’s clients are amazing, resilient Alaskans who have come to the state seeking safety, to reunify with their family, and to contribute to building the community.”***

- Robin Bronen, AIJ Executive Director

- Donations for this project
- Project will
  - Provide AIJ with a donor base
  - Contribute to the portrayal
  - Strengthen the community
  - Contribute to the project



# PROJECT SCOPE

- Create AIJ fundraising event PMP during Fall 2015 semester
- Plan the AIJ fundraising event during Spring 2016 semester



- Provide AIJ with project continuity documents (repeatable)
- Provide ESPM with research report

# RESEARCH PROBLEM STATEMENT

Newly created  
“Beyond Borders”  
fundraiser is case  
study to analyze  
PM tool  
effectiveness in  
planning and  
executing a small-  
scale fundraising  
event plan

Did PM tools  
contribute to success?

Do non-profits use PM  
tools?

Are there  
opportunities?



# PROJECT DELIVERABLES

- **Academic**

- PM 686A PMP and presentation
- PM 686B research report and presentation
- All PPM deliverables

- **Product**

- Event Checklist
- Event Flyer
- Publicity talking points
- Schedule 3 marketing events
- Invitations



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Courtesy Image

Born to a Korean mother and an American father, Jeni Rogers grew up living between two worlds. Her mother's limited abilities in English put Rogers face to face with discrimination and animosity aimed at those struggling to assimilate. For Rogers, and many other children of immigrants, attempting to understand where they fit in American society is often a lifelong process.

On April 15, Rogers, along with six other immigrants and refugees will share their stories in a format similar to Arctic Entries.

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# PROJECT CRITICAL SUCCESS FACTORS

- Raise \$5,000 for AIJ
- Hold 3+ publicity events (ads, radio, TV)
- Execute project on-time
- Develop quality continuity documents

# RESEARCH METHODS

- Analysis of tools and templates used during project
- Methods
  - Literature review
  - Interviews of experienced non-profit leaders
  - Expert recommendations from stakeholders
- Approach
  - Review of common PM tools used in non-profits
  - Monitor/control tools used in this project
  - Analysis of case study results

# LITERATURE REVIEW

- Goal: identify prevalent use of PM tools and best practices in non-profit sector
- Little empirical research
- Challenges
- Opportunities



# INTERVIEWS

- Goal: identify prevalent use of PM tools and best practices in non-profit sector
- 5 respondents + fundraising consultant
- General PMBOK familiarity
- No formal PM tools in use
- Consultant recommendations



# RESEARCH RESULTS



- PM tool benefits
- Need training
- Scale and complexity of project
- Recommended tools



# CONCLUSIONS

- Case study validate success of PM tools
- PM tools not in use in non-profit sector
- Lack of empirical research = further research
- Collaborative opportunities



# CONCLUSION



Thank you to stakeholders

- Academic
- AIJ
- Storytellers
- Arctic Entries experts

**PROMOTING JUSTICE AND  
PROTECTING THE HUMAN  
RIGHTS OF ALL ALASKANS**





C. Forner  
PM 686A/B  
PROJECT LESSONS LEARNED NARRATIVE  
Non-Profit Fundraising Event Plan - A Project  
August 2015 - April 2016

This is a summary of the lessons learned during this project. Each item will include a description of the problem, the impact that problem had on the relevant phase (planning, execution, closeout) or deliverable, and a recommendation to prevent or alleviate similar problems in the future. The lessons learned are not listed in any priority order.

**PROBLEM #1:**

The project requirements management plan and traceability matrix took much more time during the planning phase than the exercises, assignments, and exam questions covered in PM 601-604 to-date.

**IMPACT:**

The PM grossly underestimated the time it would take to complete these deliverables and had to reprioritize planning tasks.

**RECOMMENDATION:**

PMs should plan a solid week of work to get this right. Link the requirements to objectives and goals and identify how success will be measured.

---

**PROBLEM #2:**

PM failed to realize the baseline must be set in MS Project to start tracking progress during planning phase. PM also did not initially build tasks in the schedule to help meet PM686A PPM deliverable requirements.

**IMPACT:**

The PPM deliverable tasks were added late in the semester. Tasks were complete in MS Project mid-September but baseline was not set until 13 October. This delay slightly skews project schedule progress metrics.

**RECOMMENDATION:**

Understand that PMs must build the tasks required to complete PM 686A planning deliverables as well as the project product deliverables and PM 686B deliverables. As soon as tasks are entered in MS Project, set the baseline to officially start the project. This will help track more accurate schedule metrics.

---

**PROBLEM #3:**

Specific scope of this project (regarding what type of fundraising event to conduct) was difficult to establish. Final project scope was not determined until mid-September after AIJ employees voted on the project they wanted. This was almost four weeks into the planning phase.

**IMPACT:**

Contributed to a slow start to project planning and several iterations of tasks entered in MS Project.

**RECOMMENDATION:**

Have a basic scope concept before the first PM 686A meeting. If starting 686A in the fall and the PM knows that coordination with organizational stakeholders is necessary, recommend meeting with project stakeholders in early summer to give them time to decide on a project. Then meet with them often and ensure they understand the 686A course requirement timeline.

---

**PROBLEM #4:**

In MS Project, PM misunderstood fixed unit/work/duration and how the differences impact changes to the schedule. All project tasks were initially scheduled as fixed duration.

**IMPACT:**

MS Project behavior was difficult to understand when tasks were designated as fixed duration.

**RECOMMENDATION:**

For small projects like this one with the PM as the main resource, most tasks should be designated fixed work, which suggests the tasks have specific numbers of hours associated with them. Fixed duration suggest tasks must be completed in a given duration and if duration is recalculated, work is recalculated.

---

**PROBLEM #5:**

The PM created several redundant files to address issues and actions required during planning phase.

**IMPACT:**

Important information was spread out across numerous files and notebooks. This disorganization led to wasted time required to reorganize.

**RECOMMENDATION:**

Early in the planning phase, dedicate some thought to how to organize all planning documents. Keep documents as consolidated as possible and immediately start an “issues log” of some sort in either word or excel.

---

**PROBLEM #6:**

Due to delays in meeting with key stakeholders to discuss project’s relationship to AIJ’s organizational vision, goals, and objectives, the PMP scope lacked depth and comprehensiveness until PPM#4 revisions during planning phase.

**IMPACT:**

Although the PM understood the basics of AIJ’s mission, the PM had to conduct major revisions of project scope in PMP and abstract after follow-on discussions with key stakeholders. These necessary revisions took more time than originally predicted in scheduled tasks.

**RECOMMENDATION:**

Along with the recommendations for problem #3 above, meet with the stakeholders early and ask explicit questions about how the project helps to meet organizational vision, mission, budget goals, and other organizational requirements. For example, when the PM asked more specific questions, it led to refining the project subtasks regarding marketing to help align the subtasks with the organizational goal of expanding its donor base.

---

**PROBLEM #7:**

During execution, research within small organization and literature review provided limited insight to research problem statement (do non-profits commonly use PM tools?)

**IMPACT:**

PM implemented risk response for additional required research. This added several shifts of work to conduct and analyze interviews. However, all deadlines were met.

**RECOMMENDATION:**

To corroborate literature review and explore opportunities, include interviews of leaders from other like-organizations. Also maintain risk response, as it worked to enhance research if required.

---

**PROBLEM #8:**

Event date changed during execution to a date later than academic deliverable date.

**IMPACT:**

Required major scope change to remove event itself from final deliverables. Final event not included in academic research analysis.

**RECOMMENDATION:**

Finalize event date during planning phase, not execution phase, and ensure stakeholders concur. Although the event was removed from final academic deliverables, PM still carried out event after academic due date due. The ideal situation was to include event in final deliverables to analyze within academic report.

---

**PROBLEM #9:**

Deliverable “VIP mailing list” and “silent auction donations” both took almost twice as long as estimated to complete. VIP mailing list also required rework for email list instead of post addresses.

**IMPACT:**

Inaccurate estimate and unclear requirements caused extended task durations and rework.

**RECOMMENDATION:**

Estimates were based on PM experience and stakeholder input. If repeating this project, use actual durations from 2016 MS Project. In addition, all deliverable requirements should be reviewed with stakeholders who will accept final products. Note that the VIP mailing list email requirement stemmed from the non-profit’s goal of saving postal funds.

---

**OPPORTUNITY #10:**

Networking with stakeholders (board members, AIJ employees) led to introduction to Arctic Entries storyteller groomers who provided immense help with this project’s storytellers.

**IMPACT:**

These storytellers ran the rehearsal and gave volunteers expert advice. Their involvement was critical to event success. These stakeholders also benefitted, as several of the storytellers are now volunteers for Arctic Entries as well.

**RECOMMENDATION:**

Seek these experts out early and fold them into the plan (see stakeholder roster).

---

**OPPORTUNITY #11:**

Overall project a good example of collaborative effort similar to Xavier University’s effort with their local PMI chapter and United Way.

**IMPACT:**

Project demonstrates benefits of PM tools to the community, provides research opportunity and skill to the student PM, and solves real problems for the non-profit.

**RECOMMENDATION:**

For similar future projects, include Alaska PMI chapter involvement to assist with research and potential education for non-profits.

C. Forner  
PM 686B  
PROJECT KNOWLEDGE AREA FOCUS AND APPLICATION/MEASUREMENT  
Non-Profit Fundraising Event Plan  
8 April 2016

## **Project Overview**

This project will implement applied research through a fundraising project for the Alaska Institute for Justice and will examine tools used during project management execution. The four knowledge areas (KAs) that will be used during planning and execution phases are:

- Stakeholder Management
- Communications Management
- Quality Management
- Time Management

These knowledge areas were chosen to ensure the project meets stakeholder expectations, that useful and timely information is provided to stakeholders, that the project delivers quality products, and that it is executed on time. Below is a summary of how each KA was used to enhance project results throughout the planning portion of this project.

### **Knowledge Area #1 - Stakeholder Management**

How KA will be applied:

Stakeholder management will be evaluated to ensure the project's goals are aligned with stakeholder needs. It will also be applied to understand stakeholder needs and perspectives, to enhance relationships, and to influence without authority in the case of this non-profit.

Description of measurement methodology:

I will conduct informal iterative user needs assessments with the project sponsor during our bi-weekly meetings. I will also discuss how to improve the value of this project to the larger project management body of knowledge during bi-weekly meetings/calls with my academic committee members.

To demonstrate mastery, this KA will be measured in two ways: by a self-evaluation rubric and by the number of times stakeholders change requirements from PPM to PPM. Based on the data, I will attempt to determine and understand the root cause of the problems. By the next PPM, I will work to remedy the problems, document my actions, and re-evaluate my progress.

*Self-evaluation Rubric Metric:*

On a 5-point scale, measured through self-evaluation, measuring whether I performed skilled stakeholder management. Five points is master craftsman performance, one point equates to needing such significant improvement that project may fail due to poor SHM. The analysis below will explain the self-evaluation score.

As of PPM#1, my score is 2 out of 5.  
As of PPM#2, my score is 3 out of 5.  
As of PPM#3, my score is 4 out of 5.  
As of PPM#4, my score is 4 out of 5.

*Change of Requirements Metric:*

Project planning threshold is one requirement change per PPM period from any stakeholder. Anything beyond one requirement change requires deeper examination of root cause, as explained above.

Between PM686A PPM#4 and PM686B PPM#1, there were two significant scope change and no minor requirements changes from the AIJ stakeholders.

Between PPM#1 and PPM#2 there were zero significant scope changes and three minor requirements changes from PM and AIJ stakeholders.

Between PPM#2 and PPM#3 there were zero significant scope changes and numerous minor requirements changes (related to MS Project schedule) from PM.

Between PPM#3 and PPM#4 there were zero significant scope changes and one minor requirements change (related to VIP mailing list) from sponsor.

*PPM#1 KA SHM Analysis:*

I have clear expectations from AIJ stakeholders, I've had several effective dialogues with the executive director, and I held a productive meeting with AIJ fundraiser volunteers in January 2016. However, this did not prevent two significant scope changes that should have been captured during the planning phase of this project. I was aware during planning that the executive director travels often, that her availability was a listed risk, and that we *should* set a date as soon as possible (we had a tentative date in early April).

Root cause of the scope changes was inadequate planning. In hindsight, the event date should have been a planning task, not an execution task, because most project tasks and deliverables have dependencies related to the event date.

Since the planning phase ended, a new AIJ board president was appointed. I am going to schedule a meeting with him in the next two weeks to give him an overview of the project and answer any concerns.

*PPM#2 KA SHM Analysis:*

Since PPM#1, I've had several successful meetings and dialogues with AIJ stakeholders, including the new board president. My self-evaluation score also increased because I received a contact from an AIJ founder and sought out assistance from a previous AIJ employee who had experience with Arctic Entries. Since the storytelling performance event will be very similar, this stakeholder provided extremely valuable advice about the venue, how to prepare the storytellers, and how to use an event Facebook page to my advantage. These three items led to three minor

changes in the plan and schedule, all of which will positively impact the success of the final product deliverables.

*PPM#3 KA SHM Analysis:*

Since PPM#2, I have kept in touch with AIJ stakeholders by sending weekly email project status updates and answering follow up questions via email. I also met with several of the AIJ fundraising committee members for informal sessions to discuss marketing and advertising. Some of the marketing tasks are behind schedule because I need input from the executive director. However, I chose not to email these questions while the executive director was traveling for business. Rather, I will wait for the scheduled 21 Mar meeting with her and the board president for a more effective face-to-face session. The tasks and corresponding deliverables remaining open are the VIP mailing list, reviewing the publicity talking points (for radio interview and Facebook use), and scheduling radio interviews. The PM is not concerned about catching up on these tasks in the following weeks and the delay will not impact project outcomes. In hindsight, I should have gained the executive director's schedule and planned these tasks earlier, around availability, to keep them on track.

*PPM#4 KA SHM Analysis:*

Since PPM#3, I have updated AIJ stakeholders on the project status through weekly email and answering individual questions. I also held a planning meeting with AIJ staff on Mar 21<sup>st</sup>. During the meeting, I received positive feedback on all product deliverables. Only one minor issue came from the feedback--the need for email addresses on the VIP list to email invites instead of mailing them in a cost savings effort. Discussing the deliverables more in depth during the planning phase could have prevented this. Instead, the nature of the VIP list evolved during the course of the execution phase as stakeholders advised the PM on sources of target donor names to attempt to expand the donor base.

For the remaining two weeks of the project, stakeholder management went smoothly, including increased positive involvement by board members as the event date gets closer.

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## **Knowledge Area #2 - Communications Management**

How KA will be applied:

Communications management will be evaluated to ensure I provide useful and timely project information to key stakeholders, establish who needs what type of information, and how and when they will get the information.

Description of measurement methodology:

I will use the same meetings I established for stakeholder management to informally examine communications management. I will provide dashboard status reports periodically to key stakeholders and document whether I meet update deadlines. I will establish a change management plan and issues log as part of my PMP to monitor whether the information needs of project stakeholders are being met. I will also track updates to the overall PMP with version tracking.

This KA will also be measured by a 5-point scale self-evaluation rubric. Just as in SHM, I will attempt to determine and understand the root cause of the problems. By the next PPM, I will work to remedy the problems, document my actions, and re-evaluate my progress.

*Self-evaluation Rubric Metric:*

On a 5-point scale, measured through self-evaluation, measuring whether I performed skilled communications management. Five points is master craftsman performance, one point equates to needing such significant improvement that project may fail due to poor Communications Management.

As of PPM#1, my score is 3 out of 5.

As of PPM#2, my score remains 3 out of 5.

As of PPM#3, my score is 4 out of 5.

As of PPM#4, my score is 4 out of 5.

*PPM#1 KA Communications Management Analysis:*

I have continued to follow up each board meeting with an email recapping the discussion. The executive director then forwards it to all board members on my behalf to help emphasize project details and any actions required by board members. The board members are engaged and all in attendance at the meetings appear inclined to help support this project. I still need to meet with the new board president that was appointed in January 2016.

I am using the Issues and Change Management Logs as outlined in the PMP and have kept the project narrative current.

An area that needs improvement is communication with my academic advisors. Although I gave a quick overview of project progress to two of them, I did not follow up with the third advisor.

*PPM#2 KA Communications Management Analysis:*

I have continued sending regular email status updates to the AIJ stakeholders, which has resulted in several stakeholders offering ideas and advice that will contribute to deliverable success. I feel engaged with my academic stakeholders, including asking one to proof my new non-profit survey and my advisor to validate my research approach. However, I did not communicate a request for information on my previous PPM score (4.9/5.0) and therefore failed to gain insight into improving the academic portion of this project.

*PPM#3 KA Communications Management Analysis:*

Email communication is working very effectively to keep AIJ stakeholders informed and help the PM progress with project deliverables. Numerous stakeholders provided creative ideas and connections to find storytellers and a musician to open the event. The Facebook event page involved a steep learning curve for the PM, but after working with AIJ stakeholders, it is linked to the AIJ page and the format has been used to advertise on many public Anchorage websites. There are two final planning meetings scheduled in March and April. The one thing the PM could have done more effectively is communicated with the executive director about her schedule. Although this led to a few marketing tasks being slightly behind schedule, the PM

decided not to flood the executive director with email questions while she is traveling for business. The PM will be able to put these tasks back on schedule after the 21 Mar meeting.

*PPM#4 KA Communications Management Analysis:*

Email and meeting communication continued to work effectively to help the PM meet project objectives. As mentioned in SHM, PM should have clarified product deliverable criteria regarding the VIP mailing list and late request for email addresses. This caused several hours of rework that could have been avoided with better communication with the executive sponsor.

Other than the VIP mailing list glitch, the PM fulfilled the marketing product deliverable by posting the event to 10 on line Anchorage calendar sites and distributing the event flyer to all board members to post wherever they saw fit. The PM also coordinated interview requests for the project executive sponsor with Alaska Public Media, who is coordinating a story, as well as KTVA and KTUU, which did not show interest in the request. The Facebook event page was also a productive marketing tool, as approximately 100 people marked “interested” on the site as of April 7th. The steep Facebook learning curve and time investment appears to have paid off as this seems to be the easiest way for AIJ stakeholders and storyteller volunteers to spread the word about the event. PM was also interviewed by Anchorage Press and expects the article to be published in time to help encourage ticket sales to the event on April 15<sup>th</sup>.

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**Knowledge Area #3 - Quality Management**

How KA will be applied:

Quality management will be evaluated to ensure the project meets identified quality requirements and standards, including course deliverables.

Description of measurement methodology:

Primary methodology is tracking PPM and cumulative course grades. If PPM points or cumulative grade in PM686B are below “A” grade average or if feedback from stakeholders (documented on issues log) indication dissatisfaction with project progress, I will conduct root cause analysis and adjust my plan accordingly.

*PPM#1 KA Quality Management Analysis:*

I am comfortable with the quality of work submitted for PPM#1. All PM686A recommended revisions from student cohorts and academic committee members have been incorporated in the PMP and I will do the same with feedback on this PPM. Regarding product quality, I intend to review the event checklist with one of the experienced AIJ fundraising volunteers to discuss product quality and any useful modifications.

*PPM#2 KA Quality Management Analysis:*

My PPM#1 score was 4.9/5.0 and, as stated in the communications analysis, I need to follow up with my academic stakeholders for feedback. I met with student cohorts on two occasions since PPM#1 to discuss research report ideas and techniques. I also acted upon several inputs from AIJ stakeholders that will likely result in improved quality of the product deliverables.



*PPM#3 KA Quality Management Analysis:*

My PPM#2 score was 9/9. I will follow up with all three academic stakeholders in person for feedback on the draft research report next week. In addition, I am presenting all of the product deliverables (event checklist, flyer, invitation, VIP mailing list, public relations talking points, auction donor contact list, storyteller contact list) at the scheduled meeting on 21 Mar.

*PPM#4 KA Quality Management Analysis:*

At the March 21<sup>st</sup> meeting, AIJ stakeholders all expressed positive opinions regarding the ten product deliverables. These included the event checklist, event flyer, public relations talking points, scheduled publicity events, invitations, new donor (VIP) mailing list, event location coordination, the seven storytellers, the silent auction donations/donors, and the planning meetings. The only negative quality feedback involved the VIP mailing list and a desire to include email addresses to save money through e-invites instead of postage. The root cause of this problem was a lack of clearly defined product attributes in the PMP. The Quality Management Plan in the PMP states, “PM will ensure all deliverables meet the needs of the stakeholders. All product deliverables will be validated with the project sponsor.” For future similar projects, the PM recommends meeting with the sponsor and executive sponsor during the planning phase to discuss all product deliverable attributes and outline them in more detail in the PMP. Overall, following the steps in the Quality Management Plan worked to ensure the product deliverables met the needs of the stakeholders.

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## **Knowledge Area #4 - Time Management**

**How KA will be applied:**

Time management will be evaluated to ensure timely completion of the project. The project will include formulating and documenting tasks, providing proper relationships across tasks, estimating durations of tasks, analyzing activity sequences and durations, and monitoring the status of project activities.

**Description of measurement methodology:**

Earned Value Management rules of performance will be used to track the schedule and analyze time management. The main Key Performance Indicator (KPI) utilized will be the Schedule Performance Index (SPI). SPI is an index showing the efficiency of the time utilized and is calculated as earned value divided by planned value. If the SPI is between 0.8 and 0.9 the project manager will modify resources accordingly to try to maintain the project schedule, including working additional hours each week if necessary to maintain the project schedule.

The secondary KPIs utilized will be the Scheduled Variance (SV) percentage, calculated as earned value minus planned value. If the SV is positive, it indicates the project is ahead of schedule. A negative SV indicates the project is behind schedule. Extreme positive or negative SVs by task will be examined more in depth and root cause analysis will be applied where deemed appropriate by the project manager. The project tolerance for SV % is +/- 5 percent. The project manager will take appropriate action if the project goes beyond this tolerance. The

project manager will also monitor duration variance in Microsoft Project to gauge the project's most critical constraint, which is time.

*PPM#1 KA Time Management Analysis:*

<b>TASK</b>	<b>SPI</b>	<b>SV%</b>	<b>Duration Variance</b>
Overall Project as of 5 Feb 16	0.63	-37%	5 days
>Fundraising - Silent Auction	0.15	-85%	18.5 days
> Generate flyers for donors/marketing	0.0	-100%	0 hours (pending completion)

At the time of this KA update, several tasks in the project are behind schedule but recoverable. The schedule delay was caused by the delay in selecting an event date (due to executive director travel), which contributed to a delay in finalizing the event flyers and invitations.

After significant scope change due to event date moving two weeks later than the target date, the PM rebaselined the project on 4 Feb 16. The PM also updated MS Project by leveling resources and using the “reschedule task” option under the “Update Project” function. However, the PM needs to conduct further analysis of the time management metrics as the extremely out-of-tolerance rates may be exacerbated by missteps in MS Project.

These are the project statistics as of 02-05-2016.

	Start	Finish
Current	T 10/13/15	M 4/25/16
Baseline	T 10/13/15	M 4/18/16
Actual	T 10/13/15	NA
Variance	0d	5d

	Duration	Work	Cost
Current	140d	384.25h	\$384.26
Baseline	135d	378.28h	\$378.28
Actual	53.43d	150.3h	\$150.30
Remaining	86.57d	233.97h	\$233.96

Percent complete:  
 Duration: 38%      Work: 39%     

*PPM#2 KA Time Management Analysis:*

<b>TASK</b>	<b>SPI</b>	<b>SV%</b>	<b>Duration Variance</b>
Overall Project as of 24 Feb 16	0.96	-4	0 days
>PM686B Tasks	0.85	-15%	0 days
> Risk Response: rework research	0.0	-100%	0 hours (pending completion)

The EVM metrics were indeed out of tolerances due to a mistake in MS Project. PM reset the EVM metrics to the new baseline in the backdoor options and now the metrics are correct.

The PM made the decision to activate a risk response task. This risk response task was immediately behind schedule when activated, but PM will not make any immediate changes to the schedule at this time. [Side note: This was implemented after realizing less than 10 AIJ stakeholders are available to answer survey/interview questions (exec sponsor, board president, language center program manager, language center assistant, administrative assistant). The remaining stakeholders are attorneys, interpreters, or board members not involved in the day-to-day management of AIJ projects. The new survey intends to identify whether other Anchorage based non-profits use PM tools.]

In addition to activating a risk response, the PM made the following time management decisions:

- Reset EVM to current baseline (4 Feb) in MS Project backdoor options, which corrected project metrics
- Rescheduled PM resource--now available spring break (no longer traveling)
- Reestablished some no later than dates due to deliverable change (but keeping event date of 15 April in the schedule to manage it past the academic deliverables)

Over the next few weeks, the PM will further evaluate the schedule, task predecessor/successors, tasks with over allocated resources, and how MS Project should be utilized more effectively for this project.

Of note in the project statistics listed below, the percent complete for duration is greater than percent complete of work. In some cases, this is a sign that there is more work to finish than time to finish it in. However, in this project's case, many of the tasks scheduled later have more work in them, especially the research report tasks. In addition, the PM resource schedule includes more full time days and fewer half-days of work starting in March. Bottom line: the PM is monitoring this statistic but will take no additional action at this time.

These are the project statistics as of 02-24-2016

	Start	Finish
Current	T 10/13/15	M 4/25/16
Baseline	T 10/13/15	M 4/18/16
Actual	T 10/13/15	NA
Variance	0d	0d

	Duration	Work	Cost
Current	140d	351.7h	\$351.71
Baseline	135d	378.28h	\$378.28
Actual	91.84d	192.68h	\$192.69
Remaining	48.16d	159.02h	\$159.02

Percent complete:  
 Duration: 66%      Work: 55%

*PPM#3 KA Time Management Analysis:*

<b>TASK</b>	<b>SPI</b>	<b>SV%</b>	<b>Duration Variance</b>
Overall Project as of 16 Mar 16	0.92	-8%	0 days

>Marketing	0.66	-34%	0 days
> Schedule AIJ exec radio/TV interviews	0.0	-100%	0 hours
> Create event invitations and VIP mailing list	0.5	-50%	0 hours

As discussed in SHM and Communication sections, marketing tasks are driving the -8% schedule variance. The PM chose to take no additional action until after the 21 March meeting with key AIJ stakeholders, who will approve the interview proposal and mailing list.

The PM took numerous steps in MS Project to resolve several over allocated tasks across 7-8 April. An explanation of these steps is included in the project narrative under the week of 29 Feb to 6 March. The final result of these steps was the elimination of all over allocated tasks, with the exception of the risk response to rework some research (interviews of mature non-profits). This task was closed out prior to PPM#3 and there are currently no over allocated tasks in the schedule.

Project Statistics for 'Forner - AIJ Project (Update 16 Mar 16)'

	Start	Finish
Current	T 10/13/15	T 4/19/16
Baseline	T 10/13/15	M 4/18/16
Actual	T 10/13/15	NA
Variance	0d	0d

	Duration	Work	Cost
Current	136d	304.55h	\$304.56
Baseline	135d	378.28h	\$378.28
Actual	116.41d	244.67h	\$244.66
Remaining	19.59d	59.9h	\$59.90

Percent complete:   
Duration: 86%      Work: 80%      Close

In the project statistics listed above the percent complete for duration is still greater than percent complete of work, although the difference between the two percentages has improved from the previous PPM. The PM is continuing to monitor this statistic but will take no additional action at this time.

*PPM#4 KA Time Management Analysis:*

TASK	SPI	SV%	Duration Variance
Overall Project as of 7 Apr 16	0.99	-1%	0 days

During this PPM period, the marketing and donor mailing list tasks were completed, raising the SPI from 0.9 on 25 March to 0.99 on 7 April. In addition, the SV% went from -10% on 25 March to -1% on 7 April, within the set threshold for the project. SPI and SV% were outside project thresholds due to the overdue tasks listed below for the period 25 March to 1 April.

TASK	SPI	SV%	Duration Variance
Overall Project 25 March to 1 April 16	0.90-0.91	-10% to -9%	0 days
>Fundraising - Silent Auction	0.73	-27%	0 days
> Follow up with donors	0.0	-100%	0 hours
> Create donor/sponsor display	0.5	-50%	0 hours
>Marketing	0.66	-34%	0 days
> Schedule AIJ exec radio/TV interviews	0.0	-100%	0 hours
> Create event invitations and VIP mailing list	0.5	-50%	0 hours

The PM was aware that these tasks were driving the SPI and SV% outside of project thresholds and planned to complete the overdue tasks following the 21 March deliverable quality review meeting with AIJ stakeholders. Because the VIP mailing list needed corrections based on stakeholder input, it took priority over the fundraising tasks. PM also worked additional hours (from original half days scheduled) to resolve the KPIs and catch up on all overdue tasks. The final overdue task, donor display, was completed on 6 April.

The project statistics as of 7 April are listed below. At this time, there are three tasks still open in the project totaling 4 hours of work. They are:

- Hold final planning committee meeting (2 hours scheduled 12 April)
- Complete speaker planning (0 hours pending meeting 7 April)
- Closure - Complete lessons learned (2 hours, overdue from 22 March)

The PM will finish the lessons learned task following cohort presentation rehearsal on 13 April to ensure all lessons learned are captured.

	Start	Finish
Current	T 10/13/15	T 4/19/16
Baseline	T 10/13/15	M 4/18/16
Actual	T 10/13/15	NA
Variance	0d	0d

	Duration	Work	Cost
Current	136d	304.55h	\$304.56
Baseline	135d	378.28h	\$378.28
Actual	135.53d	300.5h	\$300.51
Remaining	0.47d	4.05h	\$4.05

Percent complete:  
Duration: 99%      Work: 99%

Close

# Project Management Plan

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**Project Name:** Non-Profit Fundraising Event Plan Project

**Department:** UAA Engineering, Science, and Project Management (ESPM)

**Focus Area:** PM 686A-B Capstone Project

## Prepared By

Document Owner(s)	Project/Organization Role
Carolyn Forner	Project Manager

## Project Management Plan Version Control

Version	Date	Author	Change Description
1	23 Oct 15	Forner	Document draft for PPM #3
2	20 Nov 15	Forner	Final PMP version to meet PPM #4. See "Read First" file for list of changes.
3	19 Jan 16	Forner	Scope change - event "storytelling"
4	4 Feb 16	Forner	Scope change - event date moved to after final project deliverables, rebaselined
5	21 Feb 16	Forner	Narrative update, add FaceBook and "storyteller" tasks to schedule
6	14 Mar 16	Forner	Narrative update, cancel task 3.13 create event signs, cancel task 6.2.16 complete presentation, reschedule tasks overallocated on 7-8 Apr
7	24 Apr 16	Forner	Final closeout review, files embedded

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# 1 PROJECT PURPOSE & SCOPE

One of the biggest challenges for most non-profit organizations is fundraising. The Alaska Institute for Justice (AIJ), a non-profit based in Anchorage, has been operating for over 10 years, relying primarily on grants and donations. Through the applied research of a fundraising project for AIJ and some additional organizational research, this project will take the opportunity to accomplish the following:

- Provide a repeatable fundraising event
- Evaluate how PM skills, processes, and tools can be applied to enhance use of scarce resources and improve organizational efficiency in this non-profit
- Raise awareness of AIJ's mission through the project's publicity tasks to potentially expand AIJ's donor base

## 1.1 Project Overview and Purpose

*"AIJ's clients are amazing, resilient Alaskans who have come to the state seeking safety, to reunify with their family, and to contribute to building the community."*

- Robin Bronen, AIJ Executive Director

AIJ, a non-profit based in Anchorage, AK, provides unique legal services to immigrants including naturalization assistance, visas, and family-based immigration petitions. Their priority is on representing people fleeing persecution in their home countries, as well as domestic violence and human trafficking crime victims. AIJ provides the only low-fee services of its kind in the state, helping community members who are often isolated, low-income, vulnerable to abuse, and with few other avenues to gain legal representation. AIJ also operates a statewide language interpreter center that provides translation services as well as immigrant and refugee expertise to numerous state and federal agencies dedicated to health care, social services, and law enforcement.

Donations enable AIJ to protect, defend, and advance the rights of Alaska's immigrant, refugee and limited English proficient communities. Currently, donation revenues comprise approximately one percent of its annual budget while the majority of its revenue comes from grants. Grant funding is considered challenging because it must be used under very specific conditions and grant awards are uncertain year to year. This volatility inhibits long-term organizational financial planning. Because of the challenges with grant funding, unrestricted funds raised through donations are a valuable way for AIJ to provide financial sustainability and meet all the needs of the organization and its clients.

AIJ's donor base is currently comprised of three main events: the Permanent Dividend Fund "Pick, Click, Give," an annual fall trivia event aimed at community lawyers and business people, and an annual December letter mailed to target donors. This project's intention is to provide AIJ with a fourth major fundraiser in the spring that the organization will be able to repeat annually.



## 1.2 Project Scope

The AIJ fundraising project will deliver an event with local artist musical and speaking performances and a concurrent silent auction of donated items. The event will be scheduled on April 15<sup>th</sup> 2016. The event performances, the venue location, and event agenda will be determined by the PM as part of the project execution tasks. The project will generate donations through an event entry fee and proceeds from the silent auction. The event attendance goal is 200 people and fundraising goal is to gross over \$5,000 total donations. The AIJ project will also produce detailed continuity documents to help AIJ execute this fundraising event annually.

The project theme is still to be determined but will be crafted to emphasize how Alaskan immigrants contribute to the community. This emphasis will also serve the project's publicity tasks, which are designed to increase awareness of the AIJ mission to help AIJ expand its donor base and increase its annual donor revenue. Finally, project management tools used during project execution will be analyzed in their effectiveness to provide repeatable results, enhance use of scarce resources, and improve organizational efficiency.

The scope of this project includes:

- Creating an AIJ fundraising event PMP during the Fall 2015 UAA semester
- Planning the AIJ fundraising event during the Spring 2016 UAA semester, to include
  - Establishing an event theme
  - Selecting and securing event venue location
  - Collecting silent auction donations
  - Soliciting and securing local artist performances (music, poetry, dance, stories)
  - Finalizing the event night agenda and setup tasks with AIJ fundraising committee
  - Securing an emcee for the event
- Raising awareness and positive publicity for AIJ through scheduled publicity and marketing tasks
- Identifying and testing project management tools during project execution
- Providing AIJ with project continuity documents at completion of project
- Providing ESPM with a research report encompassing the analysis of project management tools used during project execution and how the results are applicable in the broader project management domain

## 1.3 Scope Verification and Control

Deliverables from the product portion of the project will be verified and accepted by the project sponsor, the project executive sponsor, and AIJ staff. Scope will be considered met following feedback and recommendations from these stakeholders.

The advisory committee will evaluate the academic requirements and deliverables during Project Progress Milestones and Knowledge Area Application. Academic expectations include demonstrated mastery of project management principles and practices used in conjunction with completion of the project. Assessment of the overall project will be based on the quality,

timeliness, and completeness of PPM deliverables and the ability to successfully manage the project using relevant elements of the Knowledge Areas.

Changes to project scope will follow the conditions outlined in the Integrated Change Control Plan in Section 14 of this plan. The project manager is solely responsible for approving all changes to scope.

#### 1.4 Objectives and Goals

Project Objective	Goal
Plan fundraising event	Generate AIJ funds and positive publicity
Generate continuity documents	Provide AIJ with tools for repeatable event
Analyze PM tools and templates during execution	Identify PM tools useful to AIJ projects
Raise awareness and positive publicity for AIJ	Strengthen community, cultivate donors
Complete research report	Contribute to PM body of knowledge

#### 1.5 Expected Product and Project Outcomes

The goals of the product and project aspects of this project are to lead to conclusive recommendations and fulfill all product deliverables. The AIJ Fundraiser project will include applied research in the execution of a fundraising project and analysis of the tools and templates used during the project execution. The results will demonstrate mastery of project management principles and methodology and add to the project management body of knowledge. Project expected outcomes are explained in more detail below.

The project product must meet the following list of high-level requirements in order to achieve success:

- Successfully plan a fundraising event that grosses over \$5,000 in donations
- Generate positive publicity and advertising for AIJ during event execution
- Provide well-defined event continuity documents to AIJ

The academic components of the project must meet the following list of high-level requirements:

- A thorough Project Management Plan and presentation of plan
- A research paper analyzing applicable project management tools and conclusions from project execution, monitoring, and control
- A presentation of the final project

The project deliverables are:

- Project Management Plan and final presentation for Capstone Course 686A
- Final research report and presentation for Capstone Course 686B, including analysis of project management control tools implemented during project execution
- All PPM deliverables for PM 686A and 686B
- Create an event checklist to assist in execution of future annual events

- Create and distribute event flyer, to be approved by AIJ prior to posting online and in local business locations
- Create talking points with client story highlights to be used during publicity events
- Schedule at least three marketing/publicity events--radio and/or TV interviews with AIJ employees and/or clients
- Create invitations and VIP mailing list, to be approved by AIJ prior to mailing
- Choose and reserve event location
- Solicit seven local immigrant volunteers to present their story for seven minutes during event night
- Solicit 25-30 donation items for silent auction
- Work with AIJ fundraising committee to:
  - Hold at least two volunteer planning meetings leading up to event
  - Post the event announcement on the AIJ website
  - Organize the event set up and tear down
  - Designate event volunteer roles, including emcee and event donation collectors
- Provide AIJ with event continuity documents, in both a hard copy binder and CD version, to include:
  - Fundraising event checklist created during event execution
  - List of donors and event artist contacts
  - VIP mailing list used for invitations
  - Narrative explanation of coordination efforts
  - PMP files

## **1.6 Project Milestones**

The major milestones in this project include:

- Donor event item and performance solicitation complete
- Marketing of event complete
- Event venue planning complete
- Research report complete
- Provide continuity documents and report findings to AIJ

## 2 PROJECT CONDITIONS

### 2.1 Project Assumptions

The following assumptions are made at the start of project planning:

- This project has the full support of UAA MSPM academic committee members
- This project has the full support of AIJ key leaders
- The project will lead to funds raised for AIJ
- Flyer and mailing costs will be covered by AIJ

### 2.2 Project Constraints

The project may be constrained by the following:

- Project relies on goodwill donations from local population
- Project timeline must be completed by end of Spring 2016 semester
- Project must meet completion timeline for each PM 686A and 686B PPM
- Limited availability of AIJ stakeholders to provide survey inputs
- Venue preparation will require additional AIJ volunteers

### 2.3 Project Constraint Matrix

This table represents the constraint profile of this project. Time is the greatest constraint, as most academic deliverables must meet specific deadlines and product deliverables must be complete by the end of Spring 2016 semester.

	SCOPE	TIME	COST
CONSTRAIN			
OPTIMIZE			
ACCEPT			

## **2.4 Project Risks**

The project manager will perform risk management. A more detailed Risk Management Plan is located in Section 9 of this plan. Risk analysis has been completed on the project and is presented in Appendix C in the excel workbook labeled Risk Matrix.

The risks identified for the project are summarized below:

- Influential stakeholders who are initially busy and disengaged may offer differing opinions late in the project; this may result in late-breaking problematic scope changes and more time dedicated to the project; plan includes risk mitigation through communication plan and risk response to meet with board members in person
- Donation item solicitation may provide low numbers of items for auction; this could extend deadline if more donations are required; plan includes mitigation and risk response
- There may be low turnout or participation at event; this could reduce overall amount of funds raised; this is an accepted risk
- Obtaining a free or donated venue location for event may be difficult; risk response is to explore other options such as schools or community centers
- AIJ stakeholders have limited time to discuss project; this could extend deadline if more time is required for decision-making; this is an accepted risk
- It may be difficult to recruit volunteers; risk response is to request assistance from AIJ executives to solicit volunteers
- Initial research may be academically insubstantial; this may slow down timeline; risk response is to conduct additional surveys and scholarly work
- It may be difficult to establish an event date during execution timeline and date change could significantly alter product deliverables and timeline; risk mitigation is to set firm date during planning stage
- Event planning must include security consideration of local population unrest against immigrants; risk response is to discuss during planning and take action as required, up to cancelling event if perceived threat is high

## **2.5 Project Opportunities**

The opportunities identified for the project are summarized below:

- Possible improved ideas will come from stakeholders regarding marketing, fundraising, venue planning, and research
- AIJ stakeholders may assist in networking with potential donors
- Donors may assist in additional networking with other potential donors

### **3 METRICS MANAGEMENT PLAN**

Earned Value Management (EVM) rules of performance will be used to track the schedule. The project manager will track Key Performance Indicators (KPI), which will be reviewed every week to determine if additional action needs to be taken on the project.

#### **3.1 Critical Success Factors**

The AIJ Fundraiser and Non-Profit Analysis Project will be a success if the following are accomplished:

- Plan a fundraiser that grosses over \$5,000 for AIJ
- Collect at least 25 silent auction donations from local artists and businesses
- Secure seven immigrant volunteer storytellers for event night
- Execute at least three visible publicity events (ads, flyers, radio/TV) leading up to event
- Secure a donated venue location
- Event attended by at least 100 people
- Project is executed on time
- Provide well-defined event continuity documents to AIJ
- Meet all Capstone PPM deliverable deadlines
- Complete a quality research report by end of Spring 2016 semester

#### **3.2 Key Performance Indicators**

The project manager will use EVM metrics to determine project performance, primarily project schedule. The main Key Performance Indicator (KPI) utilized will be the Schedule Performance Index (SPI). SPI is an index showing the efficiency of the time utilized and is calculated as earned value divided by planned value. If the SPI is between 0.8 and 0.9 the project manager will modify resources accordingly to try to maintain the project schedule, including working additional hours each week if necessary to maintain the project schedule.

The secondary KPIs utilized will be the Scheduled Variance (SV), calculated as earned value minus planned value. If the SV is positive, it indicates the project is ahead of schedule. A negative SV indicates the project is behind schedule. Extreme positive or negative SVs by task will be examined more in depth and root cause analysis will be applied where deemed appropriate by the project manager. The project tolerances are explained in detail in Section 9. The project manager will take appropriate action if the project goes beyond this tolerance. The project manager will also monitor duration variance in Microsoft Project to gauge the project's most critical constraint, which is time.

Academic quality metrics will also be monitored during the project. More information is found in the Quality Management Plan in Section 9.

### 3.3 Knowledge Areas

The knowledge areas (KAs) to be focused on during PM 686B project execution are:

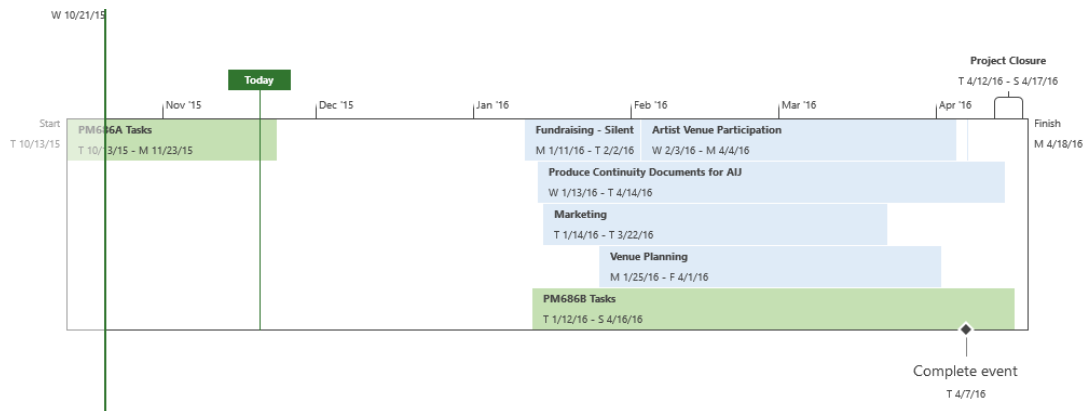
1. Time management will be evaluated to ensure timely completion of the project. The project will include formulating and documenting tasks, providing proper relationships across tasks, estimating durations of tasks, analyzing activity sequences and durations, and monitoring the status of project activities. To demonstrate mastery, SPI, SV, and duration variance will be analyzed (see KPI explanation above).
2. Stakeholder management will be evaluated to ensure the project's goals are aligned with stakeholder needs. It will also be applied to understand stakeholder needs and perspectives, to enhance relationships, and to influence without authority in the case of this non-profit. To demonstrate mastery, this KA will be measured in two ways: by a self-evaluation rubric and by the number of times stakeholders change requirements from PPM to PPM. Based on the data, the PM will attempt to determine and understand the root cause of the problems. The PM will work to remedy the problems, document actions, and re-evaluate progress.
3. Communications management will be evaluated to ensure the PM provides useful and timely project information to key stakeholders, establishes who needs what type of information, and how and when they will get the information. The PM will use the same meetings established for stakeholder management to informally examine communications management. The PM will provide dashboard status reports periodically to key stakeholders and document whether the PM met deadlines. The PM also established a change management plan and issues log as part of the PMP to monitor whether the information needs of project stakeholders are being met. The PM will also track updates to the overall PMP with version tracking. This KA will also be measured by a 5-point scale self-evaluation rubric. Just as in SHM, the PM will attempt to determine and understand the root cause of the problems. The PM will work to remedy the problems, document actions, and re-evaluate progress.
4. Quality management will be evaluated to ensure the project meets identified quality requirements and standards, including course deliverables. Primary methodology is tracking PPM and cumulative course grades. If PPM points or cumulative grade in PM686B are below "A" grade average or if feedback from stakeholders (documented on issues log) indication dissatisfaction with project progress, the PM will conduct root cause analysis and adjust the plan accordingly.

KPIs and KAs will be tracked weekly using the Metrics Log in the master project excel file. It includes columns for SPI cumulative, SV%, duration variance, stakeholder management measurement scale, stakeholder number of changes requested, communication measurement scale, and quality measurement. The log includes comments in each column heading detailing how to track each item and the thresholds for each item. Actions taken in response to metrics out of tolerances will be annotated in the Metrics Log remarks section.

## 4 SCHEDULE MANAGEMENT PLAN

The project schedule was developed using Microsoft Project. Tracking of the schedule will also be completed in Microsoft Project. The main constraint on the project is the completion by the end of Spring 2016 semester. The schedule developed includes the anticipated task start dates, and the 50% probability of task durations (most likely durations). These most likely durations were calculated based on PM academic and previous fundraising experience. See master excel sheet for Program Evaluation and Review Technique (PERT) analysis of task durations associated with risk and opportunities. Tasks and resources have been sequenced to optimize the project duration. The project was developed using 20-hour workweeks with the PM scheduled for part time days. It includes standard federal holidays and a non-work week during spring break in March 2016. The timeline figure below presents the anticipated start and end dates of each work package.

Earned Value Management rules of performance will be used to track the schedule, as discussed in the Key Performance Indicator details in Section 3.2 of this report. The KPIs will be reviewed every week to determine if action needs to be taken.





## 5 REQUIREMENTS MANAGEMENT PLAN

This plan outlines how the project manager will analyze, document, and manage project requirements. The overall intent is to trace requirements back to project objectives and goals.

The requirements traceability matrix will be used as the primary means to identify requirements information in greater detail. It will identify which project objectives, goals, and purposes are supported by the specific requirement. It also includes the Work Breakdown Structure (WBS) task reference number, the acceptance criteria of the work, the validation method used to ensure the work meets the acceptance criteria, and the status of that validation. In addition, the matrix includes any risk register references and key dependencies, impacts, or constraints tied to the work.

The requirements traceability matrix includes two separate worksheets; one for the project product requirements and one for the academic requirements. This separation will assist the project manager in meeting the overall course requirements by distinctly tracking the project product and research paper deliverables.

The project product must meet the following list of high-level requirements in order to achieve success:

- Successfully stage a fundraising event that grosses over \$5,000 in donations
- Generate positive publicity and advertising for AIJ during event execution
- Provide well-defined event continuity documents to AIJ

The academic components of the project must meet the following list of requirements:

- A thorough Project Management Plan
- A research paper analyzing applicable project management tools and conclusions from project execution, monitoring, and control
- A presentation of the final project

See the Requirements Traceability Matrix in the master project excel file in Appendix C for detailed level requirements.

## **6      STAKEHOLDER MANAGEMENT PLAN**

Stakeholder management ensures the project's goals are aligned with stakeholder needs. The project manager will strive to understand stakeholder needs and perspectives, enhance relationships, and influence without authority in the case of this non-profit.

The project manager will conduct informal iterative user needs assessments with the project sponsor during bi-weekly meetings. Near the conclusion of the project, the project manager will survey key AIJ stakeholders to evaluate whether deliverables and critical success factors are met. The project manager will also address project concerns and the value of this project to the larger project management body of knowledge during bi-weekly check ups with academic committee members.

The project stakeholders are identified in the Stakeholder Register. As new stakeholders are identified, the project manager will update the list. The stakeholder management metrics tracking and evaluation process is detailed in Section 3 Metrics Management Plan.

The Stakeholder Register and additional stakeholder analysis is located in the master project excel file in Appendix C.

## **7 COMMUNICATION MANAGEMENT PLAN**

The project manager will be the primary point of contact for all communication with stakeholders. Communications management will ensure useful and timely information is provided to key stakeholders. The type of information and how and when stakeholders receive it will be annotated in the Stakeholder Management Register.

One of the major project risks is influential board members changing requirements and scope late in the project. The communications management plan will address how to reach and handle disengaged or busy stakeholders and aligning the project with their specific interests as early in the plan as possible to prevent this risk from occurring.

The project sponsor will meet bi-weekly with the project manager for informal status update meetings. The PM will attend monthly AIJ board meetings to provide a project update. PM will follow up the board meetings with an email to the board detailing the most recent meeting update and any action or requests for the board. Other AIJ stakeholders will be kept informed of progress through periodic phone calls and emails, and formal in-person meetings if requested. All phone calls discussing scope, schedule or budget will be followed up with an entry in the Project Issues Log. From the Project Issues Log, issues will be identified if they need to be referred to the Change Control Log. Both logs are located in the master project excel file in Appendix C.

The communication management metrics tracking and evaluation process is detailed in Section 3 Metrics Management Plan.

## **8 RISK MANAGEMENT PLAN**

Risk management mastery will be demonstrated through identifying potential risk, the ability to predict variances in the schedule, and tracking and controlling responses to realized risk. Once identified, known predicted risks will be qualitatively analyzed through the project manager's subjective professional experience. The risk register will identify the probability and potential impact for each event and will address how each risk will be managed.

All planned risk responses will be included in the Microsoft Project task list as inactivated tasks. Risks that have the greatest potential affect on the schedule will be closely managed and evaluated in the project's weekly status and Knowledge Area analysis reports. See master excel sheet for Program Evaluation and Review Technique (PERT) analysis of task durations associated with risk and opportunities. In addition, all realized risk, both predicted and unpredicted, will be included in the project lessons learned with a root cause analysis summary. A Risk Realization report will also be included with project close out documents.

The project risk register is located in the master project excel file in Appendix C.

## **9      QUALITY MANAGEMENT PLAN**

The project manager is accountable for the overall quality of the project. Overall quality standards to be met include work that is grade “A,” complete, timely, demonstrates mastery and understanding of project management principles/methodology, and is accepted by stakeholders.

The project manager will ensure all deliverables meet the needs of the stakeholders. All product deliverables will be validated with the project sponsor. All project academic deliverables will be validated with the academic advisory committee. Validation will be annotated on the Requirements Traceability Matrices.

The major academic deliverables shall be of “A” grade work. Primary methodology for tracking this Knowledge Area will be PPM and cumulative course grades. If PPM points or cumulative grades in PM 686A or PM 686B are below “A” grade average the project manager will conduct root cause analysis and adjust tasks and risk response accordingly. In addition, if feedback from stakeholders indicates dissatisfaction with project progress, the project manager will also conduct root cause analysis and adjust tasks and risk response appropriately. All stakeholder feedback will be documented on the Issues Log.

Both the product and academic deliverables will be timely. The primary tools used for assessing timeliness are the schedule EVM tools. As described in Section 3 Metrics Management Plan and Section 4 Schedule Management Plan, EVM KPIs will be evaluated weekly.

## **10 COST MANAGEMENT PLAN**

A detailed Cost Management Plan is not applicable to this project. Although the project manager resource was designating a \$1/hour labor cost to assist in tracking EVM, there is no additional expected cost for this project. AIJ will cover all pamphlet production, mailing, and advertising costs. All other items will be donated, including event location, performances, and art pieces for the silent auction.

## **11 STAFFING MANAGEMENT PLAN**

A detailed Staffing Management Plan is not applicable to this project. Although a few AII employee and board member volunteers will be necessary during the fundraising event day, the project manager is the only staff member applicable to this plan. Event volunteer roles will be discussed at fundraising committee meetings prior to the event. The expected volunteers include:

- Four to five set up and tear down volunteers
- Event emcee volunteer
- Three to four door donation collectors
- Two silent auction attendees

The PM will use the resource usage sheet in MS Project to fill in hours worked on a task by day to attempt to achieve a realistic representation of the project.

## **12    PROCUREMENT MANAGEMENT PLAN**

A detailed Procurement Management Plan is not applicable to this project. During event fundraising committee meetings, the PM will determine the best way to annotate ownership transfer of silent auction items. In addition, per AIJ Executive Director, an AIJ staff member (the Language Interpreter Program Director) will provide the PM with the tax receipt document to be provided to silent auction item donors.



### **13 INTEGRATED CHANGE CONTROL PLAN**

The project manager will assess any changes to the project scope prior to any action taken. Changes requested by stakeholders will be tracked in the Change Control Log. The project manager has the final authority to authorize change orders.

Change Control Log is located in the master project excel file in Appendix C. A version control table is also located on the front page of the PMP and will be used to document changes to the PMP from original draft date of 10-23-2015.

## **14 LESSONS LEARNED PLAN**

The project manager will conduct formal lessons learned reporting at the end of each project phase. The information will include a review of project objectives achieved during the tasks in the phase and an analysis of any activities or processes that can be improved upon in the future.

At the end of the project, the project manager will have debrief meetings with both AIJ stakeholders and the academic advisory committee members to discuss a breakdown of the project. After incorporating this feedback into the project phase lessons learned, the project manager will submit the lessons learned reports. The final lessons learned report will be incorporated with the closure documents in PMP Appendix D.

## 15 CLOSE OUT PLAN

At completion of the project, the project manager will initiate close out activities to ensure completion of all deliverables. These close out activities are incorporated in Microsoft Project as sub-tasks to the project management tasks.

Close out documents will include:

- Completed Microsoft Project schedule file
- Critical Success Factors Assessment at Completion
- Risk Realization Report
- Lessons learned inputs for the close out process and PM 686B

## 16 APPROVALS

**Prepared by** \_\_\_\_\_  
Project Manager

**Approved by** \_\_\_\_\_  
Project Sponsor

## **Appendix A Project Narrative**

### 24-30 August 2015

Had the first Capstone class meeting on Friday 28 Aug. MSPM faculty reiterated that the course requirements are twofold: course and project requirements. Our schedule tasks need to include both the PMP project and academic deliverables, including a final academic report due in 686B. Academic advisory committee members are also part of stakeholder management. We discussed requirements for IRB--that everyone must finish the on-line training--and that we'd have a follow-up class session with more details on who would need a more formal IRB review.

Regarding my project, I asked Alaska Institute for Justice if they could use a PM project to help their organization. I gave them several project ideas and AIJ has preliminarily said they'd like a fundraising event.

### 31 August - 6 September 2015

On 3 Sep, I met with the AIJ Board President and the fundraising team to discuss fundraiser ideas. The goal is to provide AIJ with a repeatable event and something inclusive to clients that will also bring good publicity to AIJ. I sent a list of project ideas to AIJ and employees voted for the event they want. It will be a combination local musical/vocal artist performance with a silent auction. Funds will be raised with a cover charge and auction donations. Completed preliminary charter, schedule, and PMP draft shell.

### 7-13 September 2015

Conducted final revisions for PPM#1 deliverables submitted 11 Sep. Discussed feedback with committee advisor who emphasized that the project metrics need to answer how the project is doing and how the PM knows. I also discussed ideas on measuring the knowledge areas (KAs). I will use a self-eval rubric for stakeholder and communication management and PPM grades for quality management.

### 14-20 September 2015

Second Capstone class was 18 Sep. The next PPM KAs must show measured data and lessons learned. Students were also reminded to capture changes to the PMP and why they are made. Students submitted their initial IRB evaluation and we'll find out in the next few weeks if we need to submit the more thorough IRB evaluation.

### 21-27 September 2015

Revised preliminary survey questions for AIJ. Will conduct survey mid-January 2016. Met with two AIJ employees on 23 Sep to discuss suggestions for event date, venue location, entry fee, and points of contact to help with these topics. The employees also said they will help with advertising and that AIJ will cover pamphlet printing and miscellaneous advertising costs.

### 28 September - 4 October 2015

PPM #2 deliverables were submitted on 2 Oct.

I struggled with requirement traceability documents. Will need to put more work into them. There are two versions, one for the project product and one for the academic deliverables. I also

received feedback from one committee member to describe the needs of the AIJ clients more clearly to build my purpose. I also need to work on more measurable objectives.

#### 5-11 October 2015

I met with advisor on 5 Oct to discuss several MS Project issues. The event date is set for 7 April so I need to back up the key event dependencies accordingly. I will also schedule my resource availability for half days Mon-Fri each week. I also added level of effort tasks to my schedule and refined/adjusted some of the tasks.

On 7 Oct I attended the AIJ board meeting to present the project and field questions from board members. I emphasized that the project is to raise donations but the secondary purpose is to generative positive publicity for AIJ. I let the board know they can help with ideas about venue location and connections to local performing artists, businesses that may donate, and publicity opportunities and connections.

On 8 Oct I met with two student cohorts and we discussed how best to schedule 686A and B academic tasks. Up until this point I had missed the boat on scheduling and measuring 686A tasks and now I am behind the curve on measuring project progress and KAs. We also discussed tracking progress in MS Project and using fixed work (effort driven) versus fixed duration for milestone reviews and meetings.

Had third class session on 9 Oct. Faculty emphasized that the PMP subplans must explicitly include the decision to exclude elements of a PMP and why it is not necessary for the PMP. Students should also capture problems with the schedule such as process issues, dependency problems, LOEs etc.

#### 12-18 October 2015

I am concerned about time management for this project because I decided to spend the next month in WI for elderly parent family issues. I readjusted my tasks and resource calendar accordingly around my travel plans. I also made the mistake of not setting my MS Project baseline until 13 Oct, when I should have done it as soon as my task list was complete (although it is still a work in progress). I spend more time refining my resource calendar with hours I will work and days I am taking off through next semester.

Discussed project progress with committee member and she cautioned that I need to understand which AIJ board stakeholders may be disengaged but influential members and figure out how to reach them to ensure their interests are aligned with the project. This is a high probability high impact risk for this project that could drive late scope changes.

On 16 Oct, received notice that none of the current 686A projects require IRB review.

#### 19-25 October 2015

Worked 40+ hours on the PMP to meet PPM #3 deliverables on 23 Oct. I kept a running list of items needing revision prior to PPM #4 and the list is long--so I need to plan my time accordingly.

### 26 October - 1 November 2015

Exchanged helpful feedback with two student cohorts after we reviewed each other's PMPs.

Received additional feedback from committee member to ensure the plan has enough detail to be able to hand it off to someone else to execute. Also told major weakness in PMP was lack of scope depth and comprehensiveness. I'll work to revise and beef up over next few weeks but will need to get with AIJ sponsor to fill in some of the gaps on AIJ budget and mission details.

Attended on-line (still in WI) writing workshop. I need to get a copy of the project formatting checklist.

### 2-8 November 2015

Had class on 6 Nov (I'm still remoting in from WI). Great Consortium library presentation on the course guide online and how to best conduct literature searches. I need to reference the final course deliverables checklist available on blackboard. Items are due one week after final presentation. Abstract must be formatted with 1.5 line spacing.

### 9-15 November 2015

Received recommendation from committee member on presentation format. Use the abstract model, start by describing the opportunity, why it is important/worthwhile, and how I will execute the plan. She recommended only covering relevant portions of the PMP and why they are important to applying PM principles. I drafted a presentation outline and will finish the draft slides next week. I also started a "Read First" document for PPM #4 deliverables to highlight changes since PPM #3. It was a great benefit to me as well as it helped organize the items I still needed to revise.

### 16-22 November 2015

Completed final revisions for PPM#4 deliverables. Met with AIJ executive director, project sponsor, and some key AIJ employees to discuss final details of PMP. Charter signed on 18 November. The AIJ leaders noted that they'd like to readdress the project scope and try to find a more engaging event.

I cannot get the expected duration update to work in MS Project. It may be because tasks are scheduled in hours instead of days and primary resource is utilized to work part time Mon-Fri.

### 23-29 November 2015

Rehearsed presentations with Justin, Walter, and Allison. Main feedback for my presentation was to make the slides less boring by including pictures and build-ins in the slides.

### 30 Nov - 6 December 2015

Academic committee input to presentation: consider the risk of hostile community to immigrant issue and try to control board member stakeholder changes by using the board as a collaborative entity.

### 7-13 December 2015

Submitted digital copy on Mon, 7 Dec and printed out to drop off folder on Tue.

#### 14 December 2015 - 10 January 2016

Was not able to get ahead on research portion of project, as recommended recently by 686B students, due to UAA Lean Green Belt course attendance through Jan 13<sup>th</sup>.

#### 11-17 January 2016

Start of 686B work! Off to a methodical start by appraising all 686A products and thoroughly reviewing the 686B syllabus.

#### 18-24 January 2016

Conducted a half-day of literature review of PMI products and Consortium library. Perused applicable documents related to non-profit PM tools and saved them in a “research” file. Will need to go back through these documents in more detail to start shaping my research paper. I started the change process for a minor scope change and updated a project dashboard for first capstone lecture. I explained the first scope change, that the event itself will now involve immigrants presenting their stories (similar to Arctic Entries) rather than artist performances. I received good feedback from Roger to use PM language and methodology to explain change management, schedule management, and course of action decision-making. The big takeaway from the lecture is that the intent of the research paper is to describe how the project was executed and discuss observations (this should be  $\frac{3}{4}$  of the paper content).

#### 25-31 January 2016

Reviewed project documents and realize the effects of the first change, to the nature of the fundraising event itself, is minor. However, AIJ’s executive director asked for the date to be moved from April 7<sup>th</sup> to either the 12<sup>th</sup> or 14<sup>th</sup> of April. I will need to completely revise the project and product deliverables because the final academic deliverables are due on Friday, April 8<sup>th</sup>. I will still be able to finalize an event checklist and continuity binder, but “staging” and “organizing” a fundraising event will now be “planning” a fundraising event. In addition, I will need to modify some of the CSFs since the event results (raise \$5000, 100 people attend) will not be measureable prior to academic deliverables. I will also add “date change” to the risk register.

I held a very productive meeting with AIJ SMEs and fundraising volunteers. The AIJ team is going to vote on a list of project theme names I provided. I also collected several informational pamphlets and newsletters to help create an event flyer, although I am a few weeks behind on the flyer due to event date and location still being tentative. I’ll complete the flyer after the AIJ board meeting decision on Wed, April 3<sup>rd</sup>. We also agreed that the entry fee will be \$50 per person, we agreed to the volunteers needed for the event and where to solicit immigrant speakers. We completed a thorough publicity list, donor list, and I have a template for a donor letter from previous events. This enables me to start soliciting donations as soon as the date and location are confirmed.

I also sent the executive director several questions/requests:

1. Do I need permission to reuse photos from previous flyers?
2. Several location and date options for the board to decide at 3 Feb meeting.
3. I will need help from the board president on the VIP invitation list, the goal of which is to expand donor base by targeting philanthropies and individuals.

4. Are there any actions we should take in event planning to mitigate safety concern of public unrest toward immigrants? (this will be added as a risk)

#### 1-7 February 2016

Most of the week's work centered on PPM#1 deliverables and major scope change work due to the date of event moving to after the academic deliverables due date. The event date is Friday, April 15<sup>th</sup> in UAA Art 150. AIJ board met on Wed, 3 Feb and confirmed the date and location. PM added the "date change" risk and "event safety" risk to the register. Also requested Anchorage immigrant business statistics from an AIJ board member expert in demography to try to express how dependent local businesses are on the immigrant population. The intent is to include this info in the donor letter and VIP invitations.

PM conducted major MS Project and PMP revisions with event date change and rebaselined schedule on 4 Feb 16. The metrics that occurred after major scope change removing "Hold Fundraising Event" and subtasks from project look incorrect. Although the schedule metrics are outside the thresholds, PM needs to conduct further analysis of metrics, as this may be due to missteps in MS Project.

#### 8-14 February 2016

PM sent the executive director a paragraph on the intent of the immigrant speaker stories to help her employees find volunteer speakers.

The new AIJ board president was announced and PM set up an appointment to meet with him on February 15<sup>th</sup> to discuss assistance with the project.

Upon advice of an AIJ cofounder, PM had meeting with two people previously experienced in Arctic Entries and another similar fundraiser. The three main takeaways: hold the event at a bar or restaurant to keep it celebratory and fun; hold a practice with the storytellers to groom them for the event; and create a Facebook event page with ticket sales on line. These two experts also agreed to assist the PM with the storyteller practice. The PM currently has 4 of seven storyteller volunteers confirmed. The current deadline to gain all seven speakers is 2 April 16, which will give enough time to coordinate the speaker preparation/practice on 8 April 16.

Schedule metrics were off due to not setting new EVM baseline in MS Project backdoor options. PM realized this mistake during PM605 homework that identified the same problem with a case study project.

12 Feb PM686B Lecture #2 takeaways included documenting survey protocol in the research paper. In addition, the PM deciding to implement risk R7, insubstantial research, to include a survey of AIJ and, hopefully, other Anchorage non-profits. PM contacted the Director of Research at Foraker Group to request assistance.



### 15-21 February 2016

Much of the week's work centered on PPM#2 deliverables. As a cohort noted during a peer review on February 18th, "it's not doing the work, it's explaining the work that takes the majority of time." A good takeaway from our cohort meeting was to include specific MS Project techniques in the research paper.

The board president meeting occurred Wednesday February 17<sup>th</sup>. It was a very productive meeting, including discussing a new venue location and recommended storytellers (see email sent to Executive Sponsor on 17 Feb 16).

The PM contacted several storyteller volunteers based on recommendations from AIJ stakeholders. The task duration estimate is 23 hours and the PM suspects it will take longer to secure all seven speakers.

Based on stakeholder recommendations, the PM modified the eight-hour task "Secure venue event speaker performances" to "Coordinate and conduct event speaker practice." A new task was added, "Create Facebook event page and ticket sales link" and the PM adjusted work hours for the next several weeks to accommodate, rather than rebaseline the schedule.

Foraker Group recommended using three sources for a list of Anchorage non-profits: State Department of Labor, IRS on-line, and GuideStar. The Department of Labor had a very incomplete list (only 70 total non-profits listed) and GuideStar charges \$500 per list. The IRS list contains almost 3,000 non-profits. However, after randomly selecting ten percent from this list, the PM will need to find email addresses to send the Qualtrics survey. The total risk response measure duration allows for three half-days of work to accomplish this.

PM added an additional Risk, R10, PM availability. This will account for any illness, serious injury, or, as the PM was recently tasked, jury duty! Risk response is to increase hours available each day and weekends as necessary (currently scheduled for half days M-F and no weekends).

### 22-28 February 2016

PM finished PPM#2 deliverables. On 25 Feb, PM discussed research feedback at length with advisor. Following advisor recommendations, the researcher will also do the following:

- Review reports from Dupier, J. to gain insight from fellow 686B research reports involving non-profits
- Add "non-profit boards" to key words and explore PM and portfolio management by non-profit boards
- Consider expanding the research to answer the significance (the so what) behind asking non-profits how familiar they are with PM tools and what they use; this will involve refining the research thesis/hypothesis and explaining more thoroughly why the researcher is conducting this research
- Determine what mature non-profits are trying to accomplish with their management tools; what does "successful" mean to them? What do they think the scope or purpose of their organization is? Is sustainability or viability an objective? Is there a broad disparity to these answers across non-profits?

- Interview a handful of mature non-profits (ex: Catholic Social Services, Rasmuson) and determine what management tools they use, why, and how the tools they use help meet their perceived organizational purpose
- Answer/demonstrate whether there are PM tools to improve management of or help non-profits meet their stated purpose

PM met with a volunteer on 24 Feb who is interested in helping during event night. She was connected to the PM through AIJ's executive director.

At the end of the week, PM signed up for a Facebook page (new to FB which made this a painful learning curve). The PM also dropped off flyers and donor letters to some of the remaining silent auction donor targets and collected four donated art items. The next silent auction step is to call the remaining donor targets on 18 Mar (following draft report completion) and let AIJ volunteers know if PM needs assistance the following week.

#### 29 February-6 March 2016

PM reviewed prior research paper from J. Dupier. Although the content involved comparing leadership traits between non-profits and for-profits, some of the wording and table formatting will be helpful for the AIJ fundraising report.

In addition, after speaking with Foraker's director of research, who did not offer to share email addresses of their list of non-profits, the PM evaluated that it would take days of work to randomly select 10 percent from the IRS list of 3,000 Anchorage non-profits and find their email addresses to send them a survey. Many of these non-profits are mom and pop outfits with no employees. The total risk response measure duration allowed for three half-days of work to accomplish the added survey to boost the project research. Due to the schedule time constraints and the comment from several student cohorts that survey responses were low in numbers, the PM decided to change course, cancel the survey, and use the 12-hours allotted to interview mature non-profits instead.

The PM slightly revised the survey into interview questions to address the thesis question: "Do local non-profits apply PM tools to successfully execute and repeat fundraising events." The PM then made initial contact via email with executives from Alaska Wildlife Conservation Center, The Arc of Anchorage, Foraker Group, Anchorage Neighborhood Health Center, Rasmuson Foundation, and Catholic Social Services. On Sunday 6 March, the director of ANHC contacted the PM, who conducted a 15-minute phone interview. ANHC also recommend contacting Ken Miller, a local fundraising consultant. PM set up a meeting with him on Mon, 14 March.

PM added a few silent auction donor targets and delivered letters this week.

PM created an event page with Brown Bag ticket link and sent to AIJ for review. PM also finalized the event location at TapRoot. Of note, the 49<sup>th</sup> Brewing Company (formerly Snow Goose) charges \$1,000 for non-profit events or waives the event fee if purchasing \$20 per person plates. Yikes. TapRoot charges \$300, which includes full staffing. UAA Recital Hall charges \$350 for unsponsored non-profit events and \$240 for sponsored non-profit events.

PM needs to complete VIP list for approval in order to send out by 3<sup>rd</sup> week of March, however did not have time to complete this. Will try to finish the weekend of 12-13 Mar. Also, PM still must talk to AIJ executive sponsor to schedule radio/TV interviews for end of month.

Upon scrutiny of the schedule during narrative update, PM noted that the storyteller practice task, along with the tasks for PPM#4, analyze project lessons learned, complete report, and prepare final presentation, are all at the end of the week on 7-8 April. These tasks are over allocated and need to be rescheduled to a weekend prior to 8 April to finish these tasks and complete proper project closeout in accordance with the PMP. In addition, the task “complete presentation” is scheduled after PPM#4 and will be removed. These items were added to issues and change logs for action.

Here are the steps and reasoning the PM used to resolve the over allocated tasks on 7-8 April. First, PM added additional weekend work hours to the resource schedule exception in MS Project for the weekends of 19 Mar, 26 Mar, and 2 April. Upon leveling all resources, an MS error occurred for task “Create event list.” MS Project stated to either reduce the resources assigned units or increase resource availability. PM skipped these options in the leveling feature. PM then reduced task durations for PPM 3 and 4 from ten hours each to one hour each since these were overestimates with redundant task hours reflected in “report writing” and “KA update” tasks. This eliminated double counting of hours for the same tasks. PM then reduced the task “prep final presentation” from ten to four hours based on experience with 686A presentation prep work. PM also deleted task “consolidate final documents” as it was redundant in other PPM deliverable tasks. PM deleted task “create event signs” as it was now unnecessary at the TapRoot venue (it would have been needed at a UAA location). PM reduced task “coordinate and conduct speaker practice” from the overestimated ten hours to three hours based on input from an Arctic Entries expert with storyteller grooming experience. PM removed “finish no earlier than” constraints for tasks “complete report” and “analyze lessons learned” because this constraint was mistakenly applied. Task “schedule radio and TV interviews” was reduced from four to one hour since it was an overestimation. At this point, the only over allocation in the schedule was the implemented risk response to “rework research.” Since this task involved interviews of mature non-profit leaders--interviews that were mostly finished at this point--the PM took no further action to amend the schedule.

Attended 4 March PM686B lecture #3. Lecture focused on paper formatting and was extremely helpful. Some takeaways include

#### 7-13 March 2016

There are 30 work hours allocated in the schedule next week to finish draft report. PM has a solid draft literature review section complete and needs to finish interview and project deliverable analysis and bring it all together.

Conducted interview with CSS, phone interview with Foraker, phone interview with Arc of Anchorage. Sent additional emails to AWCC, Volunteers of Alaska, and cancelled interview with Rasmuson since they do not conduct fundraising as a foundation.

Spent an hour on the phone with Brown Paper Tickets to fix the event charge from \$50 per person to \$0.00 with a suggestion of \$50 per executive sponsor's request.

PM created the VIP invitation and updated the event flyer. Went through several iterations of both documents with AIJ to fix minor formatting issues, adding links, and updating with AIJ employee recommendations.

Per recommendation from AIJ employee, PM contacted several travel agencies for package deal donations, Apple, and local chefs for an evening of cooking dinner donation.

Spent time on weekend updating report format, abstract, narrative/issue/change logs, finalizing checklist, and finishing AIJ executive sponsor talking points for upcoming interviews (still need to be scheduled after meeting with AIJ next week).

#### 14-20 March 2016

Meeting with AIJ on Wed, 16 March to review the flyer and invitations and discuss VIP targets. AIJ had a high school student volunteer to print, fold, and stuff flyers into envelopes and include a standard AIJ remit envelope. The VIP and existing AIJ donor mailing list will need to be discussed at the 21 Mar meeting with executive director and board president to determine their desired target audience.

Following draft research report submission, PM will follow up with remaining silent auction donors. PM will also email the current storytellers to remind them there is less than one month and that practice is tentatively scheduled for Thursday, 7 April at 5:00 p.m. at AIJ.

#### 21- 27 March 2016

Meeting with AIJ fundraising committee held 21 Mar. PM discussed event schedule, volunteer roles on event night, status of silent auction donations, a list of VIP donors based on board members of the Anchorage Downtown Partnership and the Anchorage Economic Development Corporation, status of storytellers. PM provided the event checklist along with all contact lists created, and received positive feedback on most deliverables. The only problem was with the VIP donor list, which included only names and mailing addresses. The executive sponsor requested emailing VIP invites instead of mailing them to save funds. This was a communication breakdown that cost the PM several hours re-accomplishing the contact list with email addresses and phone numbers. PM should have clearly defined this deliverable with the sponsor prior to developing it. Also, the email addresses were not easy to find online and PM will discuss with board president at a future date the best way to get these invites out.

PM spent much of the week picking up donated items, posting calendar advertisements on line (see list of posts in deliverable contact list product) conducting an interview with Anchorage Press, connecting storytellers with Anchorage Public Media, and requesting stories from KTUU and KTVA

Note that the next AIJ meeting will be 12 April (after final research report due).

### 28 March - 3 April 2016

PM met with two academic advisors for report feedback. General feedback included a simpler research report title, ensuring the report links the interview findings to the literature and project result, and demonstrate how it proves or disproves previous research. In addition, the PM was advised to explain the problem, why it was important, what was produced with a focus on the end products. PM will expand the report to include what tools and methods will be recommended for use in future projects and why they will help accomplish the project objectives. In addition, the writing will be revamped to be less of a “play by play” account of the project.

PM used the majority of time this week to revise report. PM also reviewed previous student reports to crosscheck content and quality.

In addition, the 6868B lecture addressed the final project presentation. Key takeaways included to own and love the project, use persuasive storytelling when addressing the knowledge areas to demonstrate mastery, and package the message in “PM speak.”

### 4 - 8 April 2016

PM spent the early portion of the week sending updates to AIJ stakeholders, coordinating the storyteller rehearsal on 7 April, posting Facebook reminders to encourage ticket sales, and sending an email invite to the members of the Anchorage Downtown Partnership members. PM also put together an event schedule for the emcee to help with his script, including details on the storytellers, some AIJ and immigration facts, and famous quotes (and a few jokes) about immigration. The emcee will be at the storyteller rehearsal to meet the participants and discuss the script.

The musician group to open the event at TapRoot, Pamyua, informed the board president that their event fee is \$4500. Ouch. PM used an Arctic Entry contact to find a backup musician. Coordination is still in work as of 6 April.

VIP donor list, which was the deliverable that required adjustment per Exec Sponsor after the last AIJ meeting, is complete. However, many emails were not available and the on line search was very time consuming. Board president suggested sending the event invite to the AEDC president with a request to send it via email to board members.

PM also produced draft presentation slides and conducted final report formatting.

### 9 - 15 April 2016

Final fundraiser planning meeting with AIJ is scheduled for 12 April.

Cohort presentation rehearsal is scheduled 13 April at 4:00 p.m.

Beyond Borders event is 15 April. Yay! See final presentation for results.

### 16 - 22 April 2016

Final deliverables due 25 Apr.

## Appendix B Project Schedule Files

Final project schedule files include:

- Microsoft Project file (separate file – would not embed)
- Work Breakdown Structure file
- Gantt Chart file



Forner - AUJ Project WBS Final.png



Forner - Gantt Final.pdf

## Appendix C Master Project Excel File

This excel file includes:

- Risk Register
- Stakeholder and Communication Matrix
- Requirements Traceability Matrix for Academic Requirements
- Requirements Traceability Matrix for Project Product Requirements
- Project Change Log
- Project Issues Log
- Project Metrics Tracking Log
- PERT analysis calculation sheet



Forner - AIJ Project Master Excel File (as of 042416).xlsx

## Appendix D Closure Documents

Project closure documents for PM 686B will include:

- Completed Microsoft Project schedule file (separate file – would not embed)
- Critical Success Factors Assessment at Completion
- Risk Realization Report
- Lessons learned inputs for PM 686A (located in Tab 2 of 686A deliverables)
- Lessons learned inputs for the closeout process and PM 686B



Forner - AUJ Project  
CSFs At Completion.d



Forner - AUJ Project  
Risk Realization Repor



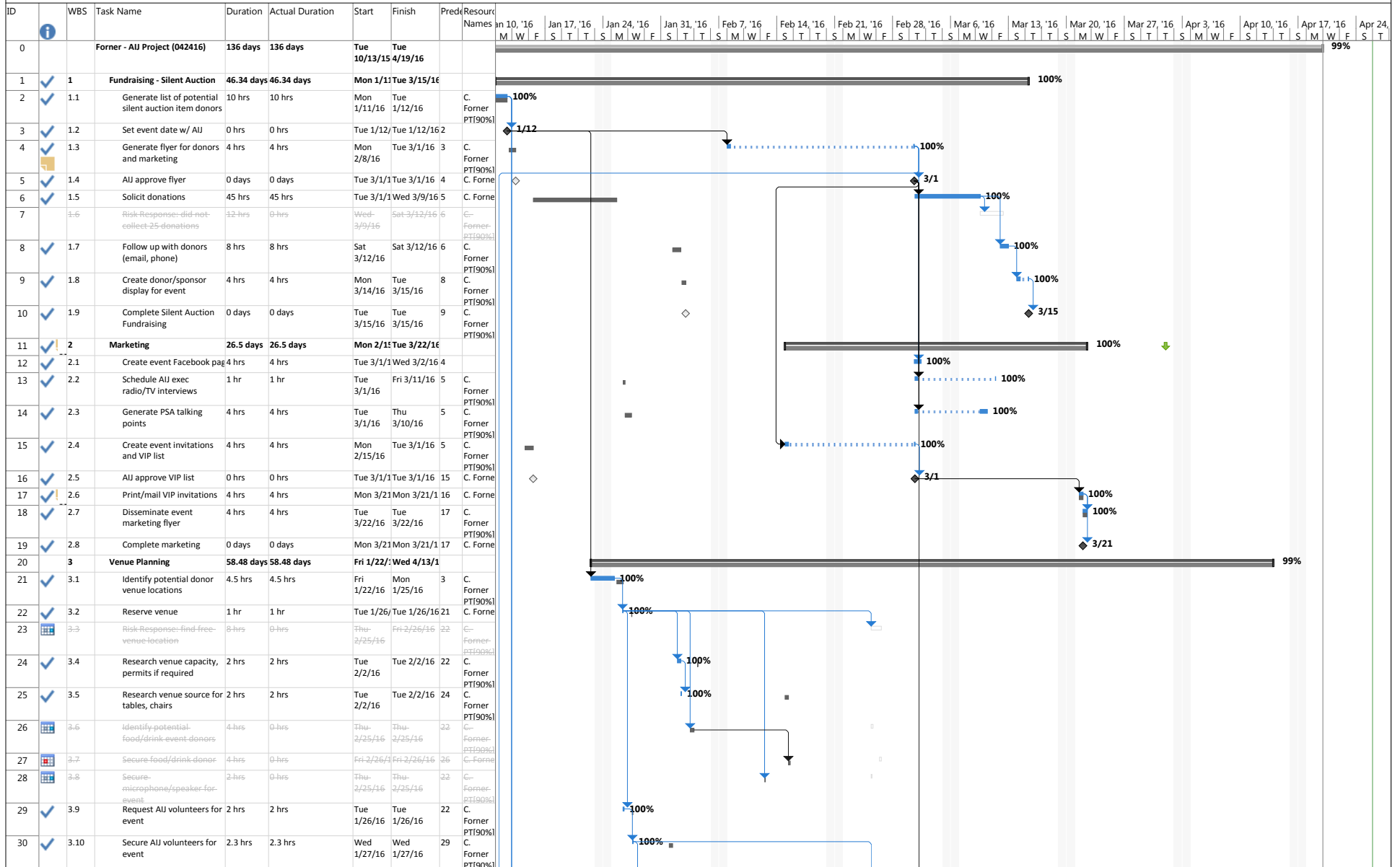
Forner - PM686A  
Project Lessons Learn



Forner - Project  
Lessons Learned Narr



Forner - AIJ Project (042416).mpp



Critical		Split		Finish-only		Baseline Milestone		Manual Summary		Inactive Task	
Critical Split		Task Progress		Duration-only		Milestone		Project Summary		Inactive Milestone	
Critical Progress		Manual Task		Baseline		Summary Progress		External Tasks		Inactive Summary	
Task		Start-only		Baseline Split		Summary		External Milestone		Deadline	

Forner - AJJ Project (042416).mpp

ID	WBS	Task Name	Duration	Actual Duration	Start	Finish	Predecessors	Resource Names	Jan 10, '16	Jan 17, '16	Jan 24, '16	Jan 31, '16	Feb 7, '16	Feb 14, '16	Feb 21, '16	Feb 28, '16	Mar 6, '16	Mar 13, '16	Mar 20, '16	Mar 27, '16	Apr 3, '16	Apr 10, '16	Apr 17, '16	Apr 24, '16	
									M	W	F	S	T	T	S	M	W	F	S	T	T	S	M	W	F
31	3.1.1	Risk Response-lack of volunteers-gain AJJ exec-assistance	4 hrs	0 hrs	Thu 2/25/16	Thu 2/25/16	30	C. Forner																	
32	3.1.2	Schedule/hold initial planning committee meeting	2 hrs	2 hrs	Wed 1/27/16	Thu 1/28/16	30	C. Forner																	
33	3.1.3	Hold final planning committee meeting	2 hrs	2 hrs	Wed 4/13/16	Wed 4/13/16	32	C. Forner																	
34	3.1.4	Complete venue planning	0 days	0 days	Wed 4/6/16	Wed 4/6/16	33	C. Forner																	
35	4	Speaker Venue Participation	28.01 days	28.01 days	Tue 3/1/16	Sat 4/9/16																			
36	4.1	Research local immigrant speaker ideas	4 hrs	4 hrs	Tue 3/1/16	Mon 3/14/16	5	C. Forner																	
37	4.2	Solicit speakers for event	8 hrs	8 hrs	Mon 3/14/16	Fri 4/8/16	36	C. Forner																	
38	4.3	Coordinate and conduct event speaker practice	3 hrs	3 hrs	Fri 4/8/16	Sat 4/9/16	37,34	C. Forner																	
39	4.4	Complete speaker venue participation	0 days	0 days	Sat 4/9/16	Sat 4/9/16	38	C. Forner																	
40	5	Produce Continuity Documents for AJJ	51 days	51 days	Tue 1/12/16	Wed 3/23/16																			
41	5.1	Initiate event checklist/binder for AJJ	8 hrs	8 hrs	Tue 1/12/16	Wed 1/13/16	4	C. Forner																	
42	5.2	Revise event checklist/binder for AJJ	8 hrs	8 hrs	Mon 2/15/16	Tue 2/16/16	32	C. Forner																	
43	5.3	Complete event checklist/binder for AJJ	4 hrs	4 hrs	Wed 3/23/16	Wed 3/23/16		C. Forner																	
44	6	Project Management	136 days	136 days	Tue 10/13/15	Tue 4/19/16																			
45	6.1	PM686A Tasks	30.5 days	30.5 days	Tue 10/13/15	Tue 11/24/15																			
46	6.1.1	Develop Risk Mgt and PERT	6 hrs	6 hrs	Tue 10/13/15	Wed 10/14/15		C. Forner																	
47	6.1.2	PMP subplans revisions #1	4 hrs	4 hrs	Wed 10/14/15	Wed 10/14/15	46	C. Forner																	
48	6.1.3	PMP Subplans revisions #2	4 hrs	4 hrs	Thu 10/15/15	Thu 10/15/15	47	C. Forner																	
49	6.1.4	Abstract revisions	1 hr	1 hr	Fri 10/16/15	Fri 10/16/15	48	C. Forner																	
50	6.1.5	Schedule revisions (CP) and Gantt	1 hr	1 hr	Fri 10/16/15	Fri 10/16/15	49	C. Forner																	
51	6.1.6	Research methods and outcomes	2 hrs	2 hrs	Fri 10/16/15	Fri 10/16/15	50	C. Forner																	
52	6.1.7	Update KA Data	4 hrs	4 hrs	Fri 10/23/15	Fri 10/23/15	51	C. Forner																	
53	6.1.8	Final PPM#3 revisions/post to BB	4 hrs	4 hrs	Fri 10/23/15	Fri 10/23/15	52	C. Forner																	
54	6.1.9	Send research methods to advisor for approval	15 mins	15 mins	Fri 10/23/15	Fri 10/23/15	51	C. Forner																	
55	6.1.10	PMP subplans revisions #3	24 hrs	24 hrs	Mon 10/26/15	Mon 11/2/15	53	C. Forner																	
56	6.1.11	Update KA Data	8 hrs	8 hrs	Mon 11/9/15	Tue 11/10/15	55	C. Forner																	
57	6.1.12	Presentation Prep	8 hrs	8 hrs	Mon 11/16/15	Tue 11/17/15	56	C. Forner																	
58	6.1.13	Identify KA's for 686B	4 hrs	4 hrs	Wed 11/18/15	Wed 11/18/15	56	C. Forner																	

Critical		Split		Finish-only		Baseline Milestone		Manual Summary		Inactive Task	
Critical Split		Task Progress		Duration-only		Milestone		Project Summary		Inactive Milestone	
Critical Progress		Manual Task		Baseline		Summary Progress		External Tasks		Inactive Summary	
Task		Start-only		Baseline Split		Summary		External Milestone		Deadline	

Forner - AJJ Project (042416).mpp

ID	WBS	Task Name	Duration	Actual Duration	Start	Finish	Predecessors	Resources	Jan 10, '16	Jan 17, '16	Jan 24, '16	Jan 31, '16	Feb 7, '16	Feb 14, '16	Feb 21, '16	Feb 28, '16	Mar 6, '16	Mar 13, '16	Mar 20, '16	Mar 27, '16	Apr 3, '16	Apr 10, '16	Apr 17, '16	Apr 24, '16
59	6.1.14	Schedule refining	6 hrs	6 hrs	Wed 11/18/15	Fri 11/20/15		C. Forner PT(90%)																
60	6.1.15	Research revisions from advisor	4 hrs	4 hrs	Fri 11/6/15	Fri 11/6/15		C. Forner PT(90%)																
61	6.1.16	Final PMP, presentation, research revisions	30 hrs	30 hrs	Mon 11/9/15	Fri 11/20/15		C. Forner PT(90%)																
62	6.1.17	PPM#4 post to BB	30 mins	30 mins	Fri 11/20/15	Fri 11/20/15		C. Forner PT(90%)																
63	6.1.18	Presentation Rehearsal	8 hrs	8 hrs	Fri 11/20/15	Tue 11/24/16		C. Forner PT(90%)																
64	6.2	<b>PM686B Tasks</b>	<b>69.75 days</b>	<b>69.75 days</b>	<b>Tue 1/12/16</b>	<b>Mon 4/18/16</b>																		
65	6.2.1	Schedule interviews with AU key stakeholders	1 hr	1 hr	Tue 1/12/16	Tue 1/12/16		C. Forner PT(90%)																
66	6.2.2	Interview/survey stakeholders	4 hrs	4 hrs	Tue 1/12/16	Tue 1/12/16		C. Forner PT(90%)																
67	6.2.3	Analyze scholarly literature on non-profits	18 hrs	18 hrs	Tue 2/9/16	Fri 2/12/16		C. Forner PT(90%)																
68	6.2.4	Risk Response: rework research if insubstantial	12 hrs	12 hrs	Fri 2/12/16	Wed 2/17/16		C. Forner PT(90%)																
69	6.2.5	PPM#1 Tasks	10 hrs	10 hrs	Thu 1/28/16	Mon 2/8/16		C. Forner PT(90%)																
70	6.2.6	PPM#2 Tasks	10 hrs	10 hrs	Wed 2/17/16	Fri 2/19/16		C. Forner PT(90%)																
71	6.2.7	PPM#3 Tasks	1 hr	1 hr	Fri 3/11/16	Fri 3/11/16		C. Forner PT(90%)																
72	6.2.8	PPM#4 Tasks	1 hr	1 hr	Fri 4/8/16	Fri 4/8/16		C. Forner PT(90%)																
73	6.2.9	Analyze project lessons learned	2 hrs	2 hrs	Wed 4/13/16	Wed 4/13/16		C. Forner PT(90%)																
74	6.2.10	Draft report	30 hrs	30 hrs	Tue 3/15/16	Fri 3/18/16		C. Forner PT(90%)																
75	6.2.11	Review draft report with academic committee	2 hrs	2 hrs	Sat 3/19/16	Sat 3/19/16		C. Forner PT(90%)																
76	6.2.12	Review draft report & lessons learned with AU key leaders	2 hrs	2 hrs	Sat 3/19/16	Sat 3/19/16		C. Forner PT(90%)																
77	6.2.13	Revise report	8 hrs	8 hrs	Sat 3/19/16	Sun 3/20/16		C. Forner PT(90%)																
78	6.2.14	Complete report	8 hrs	8 hrs	Sun 3/20/16	Mon 3/21/16		C. Forner PT(90%)																
79	6.2.15	Complete draft presentation	2 hrs	2 hrs	Mon 4/18/16	Mon 4/18/16		C. Forner PT(90%)																
80	6.3	<b>Monitor &amp; Control (LOE Ta)</b>	<b>136 days</b>	<b>136 days</b>	<b>Tue 10/1/15</b>	<b>Tue 4/19/16</b>																		
81	6.3.1	Evaluate KA's	85.75 days	85.75 days	Tue 10/1/15	Tue 4/19/16																		
82	6.3.2	Risk Response: project comm-stakeholder requests major project changes	8 hrs	0 hrs	Tue 3/1/16	Wed 3/2/16		C. Forner PT(90%)																
83	6.3.3	Generate periodic status reports	85.75 days	85.75 days	Tue 10/13/15	Tue 4/19/16																		
84	6.4	<b>Project Closure</b>	<b>0.5 days</b>	<b>0.5 days</b>	<b>Tue 3/22/16</b>	<b>Tue 3/22/16</b>																		
85	6.4.1	Complete lessons learned	4 hrs	4 hrs	Tue 3/22/16	Tue 3/22/16		C. Forner PT(90%)																

Critical		Split		Finish-only		Baseline Milestone		Manual Summary		Inactive Task	
Critical Split		Task Progress		Duration-only		Milestone		Project Summary		Inactive Milestone	
Critical Progress		Manual Task		Baseline		Summary Progress		External Tasks		Inactive Summary	
Task		Start-only		Baseline Split		Summary		External Milestone		Deadline	

C. Forner  
PM 686B  
PROJECT CRITICAL SUCCESS FACTORS AT COMPLETION  
Non-Profit Fundraising Event Plan  
24 April 2016

The AIJ Non-Profit Fundraising Event Plan project critical success factors and results are:

1. Plan a fundraiser that grosses over \$5,000 for AIJ
  - Net total: \$6,469.24
2. Collect at least 25 silent auction donations from local artists and businesses
  - 26 items collected and sold
3. Secure seven immigrant volunteer storytellers for event night
  - Seven storytellers participated
4. Execute at least three visible publicity events (ads, flyers, radio/TV) leading up to event
  - Anchorage Press article
  - Alaska Public Media interview
  - Contacted KTUU and KSKA but not interested
  - Facebook event page
  - Approximately 20 online event calendar postings
5. Secure a donated venue location
  - No--TapRoot event fee is \$300
6. Event attended by at least 100 people
  - 160 in attendance
7. Project is executed on time
  - All deadlines met
8. Provide well-defined event continuity documents to AIJ
  - Continuity binder with all product deliverables and digital files
9. Meet all Capstone PPM deliverable deadlines
  - All deadlines met
10. Complete a quality research report by end of Spring 2016 semester
  - Final grade TBD

Risk Register												
Project Manager: C. Forner												
Project Name: AIJ Fundraiser and Non-Profit Analysis												
WBS	Risk ID #	Risk Name	Description of Risk	Effect on Scope	Effect on Cost	Effect on Duration	Likelihood 1=not likely 3=likely 5=very likely	Impact 1=negligible 3=Marginal 5=significant	Risk Level (L * I) 1-5 = Low 6- 9 = Mod 10+=High	Response Type (e.g. Mitigate, Transfer, Accept, etc.) and specific actions to be taken	Risk Level AFTER Mitigation (L * I) 1-5 = Low 6- 9 = Mod 10+=High	Actual Effect
1.5 3.1 4.2 6.3.3	R1	Project communication	Influential stakeholders who are initially disengaged may offer differing opinions or scope change desire late in the project	Changing reqmts		Extend duration	5	5	25	Mitigate: thorough project comm plan with details for each board member, engage with board members often, get feedback on influential members; risk response to meet with members in person (Post-mitigation L=3; I=5)	15	
1.9	R2	Limited donations	Donation item solicitation may provide low number of items for auction; could require additional time to solicit other local businesses			Extend duration	3	3	9	Mitigate: target 50 businesses for 25 donations; if less than 50% response, risk response to extend solicitation by 3 days and target add'l businesses (Post-mitigation: L=2; I=2)	4	
NA	R3	Low turnout	May be low turnout or participation at event, reducing the overall net amount of funds raised				2	2	4	Accept: plan includes formulating VIP invite list and several advertising events	4	
3.14	R4	Free venue	Obtaining free/donated venue location for event may be difficult			Extend duration	2	2	4	Accept: risk response to extend solicitation by 2 days to include local schools & community centers	4	
NA	R5	Stakeholder time	Not available to make decisions or eval milestones and reports during project may slow			Extend duration	2	2	4	Accept; plan meetings around exec and board member availability	4	
3.15	R6	Volunteers available	May be difficult to recruit volunteers for event day activities			Extend duration	1	3	3	Mitigate: clearly communicate request to AIJ execs now; risk response to request board member volunteers (Post-mitigation: L=1; I=2)	2	
6.2.1 7	R7	Research insubstantial	Initial research and survey results may be academically insubstantial			Extend duration	1	2	2	Accept; risk response: 3 days of additional surveys and scholarly work	2	
ALL	R8	Event date change	Date may change due to key stakeholder availability	Changing reqmts			3	4	12	Mitigate: establish firm date during planning phase Accept: change requirements and modify schedule accordingly	5	Removed deliverable "Event"
3.14	R9	Security concerns during marketing and event	Local population may dislike idea of immigrants and generate a security threat to volunteers during advertising campaign and event	Changing reqmts			1	5	5	Accept: risk response to discuss additional security measures with AIJ; worst case cancel event if credible threat	5	
ALL	R10	PM Availability	PM availability may be reduced by illness, jury duty, or other constraints.			Extend duration	3	2	6	Accept: risk response is to work additional hours (original schedule is half-days and no weekends)		
NA	O1	Opportunity: stakeholder ideas	Stakeholders may provide improved ideas for marketing, fundraising, venue planning, and research			Reduce duration	2	2	4	Plan includes engagement with stakeholders for ideas	NA	
NA	O2	Opportunity: stakeholder networking	AIJ stakeholders may assist in networking with potential donors			Reduce duration	2	2	4	Plan includes engagement with stakeholders for networking assistance	NA	
NA	O3	Opportunity: donor networking	Donors may assist in additional networking with other potential donors			Reduce duration	2	2	4	Event flyer will explain event cause, small community of connected artists and businesses may help spread word	NA	

**Stakeholder Register and Communications Plan**

Project Manager: C. Forner

Project Name: AIJ Fundraising and Non-Profit Analysis Project

NAME	ROLE	CONTACT INFO	TYPE	RESPONSIBILITIES IN PROJECT	INFLUENCE ON PROJECT OUTCOME	EXPECTATIONS	COMMUNICATIONS PLAN	ADD'L INFO
Carol Forner	Project Manager	814-571-8092 csforner@gmail.com	Internal	Design, plan, manage project	High	Clear comm with all stakeholders	See below	
Anastacia Smelova	Project Sponsor, AIJ Board President	See offline printed product for personal security reasons	Internal	Approval of project, project advocate, oversee event, gain volunteer assistance as req'd	High	Charter and PMP approval, maintain AIJ professional image, PM conducts fairly autonomous work, meet fundraising goal, provide PM insight and repeatable results	Biweekly meetings with PM, monthly feedback to PM, PM sends dashboard status via email	Board president for past 1.5 years. Elections in Dec 2015 will likely result in new president.
Robin Bronen	AIJ Executive Director	robin.bronen@akijp.org	Internal	Executive oversight, project advocate, support research	High	Maintain AIJ professional image, generate positive publicity, meet fundraising goal, provide PM insight and repeatable results	Monthly feedback to PM, PM sends dashboard status via email, interview Jan 2016 on org processes, conduct project review/feedback session following Apr event	Limited availability due to extensive travel for climate research project.
Roger Hull	MSPM Academic Advisor	rkhull@uaa.alaska.edu	External	Academic oversight/guidance	Medium	Demonstrate PM process & KA learning & mastery, contribute to PM body of knowledge, demonstrate leadership	Biweekly meeting or status email	PM seeks additional scrutiny of scheduling, time mgt, risk mgt, & change mgt
LuAnn Piccard	MSPSM Committee	lpiccard2@uaa.alaska.edu	External	Academic oversight/guidance	Medium	Demonstrate PM process & KA learning & mastery, contribute to PM body of knowledge, demonstrate leadership	Biweekly meeting or status email	PM seeks additional scrutiny of non-profit project stakeholder management & other unique challenges
Seong Dae Kim	MSPSM Committee	sdkim2@uaa.alaska.edu	External	Academic oversight/guidance	Medium	Demonstrate PM process & KA learning & mastery, contribute to PM body of knowledge, demonstrate leadership	Biweekly meeting or status email	PM seeks additional scrutiny of non-profit project controls/measures used in project
Abigail Enghirst	AIJ Board VP	aenghirst@gmail.com	Internal	Volunteer support, provide project improvement ideas and donor networking	Low	Meet fundraising goal	Verbal update at monthly board mtgs with follow up email recap of discussion	
Yaso Thiru	AIJ Board Treasurer	See offline printed product for personal security reasons	Internal	Volunteer support, provide project improvement ideas and donor networking	Low	Meet fundraising goal	Verbal update at monthly board mtgs with follow up email recap of discussion	
Jeff Landfield	AIJ Board Secretary	See offline printed product for personal security reasons	Internal	Volunteer support, provide project improvement ideas and donor networking	Medium	Meet fundraising goal	Verbal update at monthly board mtgs with follow up email recap of discussion	Very engaged member of fundraising committee, well connected to community, and has great publicity ideas
Mara Kimmel	AIJ Board Member	See offline printed product for personal security reasons	Internal	Volunteer support, provide project improvement ideas and donor networking	High	Meet fundraising goal	Verbal update at monthly board mtgs with follow up email recap of discussion	AIJ co-founder (with Robin)
Andrea Dewees	AIJ Board Member	See offline printed product for personal security reasons	Internal	Volunteer support, provide project improvement ideas and donor networking	Low	Meet fundraising goal	Verbal update at monthly board mtgs with follow up email recap of discussion	
Felix Rivera	AIJ Board Member	See offline printed product for personal security reasons	Internal	Volunteer support, provide project improvement ideas and donor networking	Medium	Meet fundraising goal	Verbal update at monthly board mtgs with follow up email recap of discussion	Active member of fundraising committee
Indra Arriaga	AIJ Board Member	See offline printed product for personal security reasons	Internal	Volunteer support, provide project improvement ideas and donor networking	Medium	Meet fundraising goal	Verbal update at monthly board mtgs with follow up email recap of discussion	Concern with soliciting donations from low-wage artists, keep member engaged in project to avoid late change requests

**Stakeholder Register and Communications Plan**

Project Manager: C. Forner

Project Name: AIJ Fundraising and Non-Profit Analysis Project

NAME	ROLE	CONTACT INFO	TYPE	RESPONSIBILITIES IN PROJECT	INFLUENCE ON PROJECT OUTCOME	EXPECTATIONS	COMMUNICATIONS PLAN	ADD'L INFO
Caitlin Shortell	AIJ Board Member	See offline printed product for personal security reasons	Internal	Volunteer support, provide project improvement ideas and donor networking	Low	Meet fundraising goal	Verbal update at monthly board mtgs with follow up email recap of discussion	
Chad Farrell	AIJ Board Member	See offline printed product for personal security reasons	Internal	Volunteer support, provide project improvement ideas and donor networking	Medium	Meet fundraising goal	Verbal update at monthly board mtgs with follow up email recap of discussion	UAA Demography and Sociology professor who will help provide demographic and economic data to support marketing talking points
Barb Jacobs	AIJ Interpreter Program Director	See business card	Internal	Volunteer support, event publicity	Medium	Meet fundraising goal	Generate publicity for AIJ, interview mid-semester on org processes	Active member of fundraising committee, will provide donor tax donation form
Mai La Vang	AIJ Administrative Assistant	See business card	Internal	Volunteer support, event publicity	Medium	Meet fundraising goal	Generate publicity for AIJ, interview mid-semester on org processes	Active member of fundraising committee, will provide flyer and talking point assistance
Sarah Ibrahim	AIJ Language Interpreter Center Assistant	See business card	Internal	Volunteer support, event publicity	Medium	Meet fundraising goal	Generate publicity for AIJ, interview mid-semester on org processes	Active member of fundraising committee, will help solicit AIJ employee volunteers for event
Vikram Patel	Former AIJ attorney, experienced Arctic Entries storyteller groomer	See offline printed product for personal security reasons	External	PM support, will assist with storyteller grooming/practice	Low	Provide constructive feedback to PM	Email, phone as required	Extremely helpful sharing experiences and ideas; trusted by AIJ
Sara Perman	Vikram's acquaintance; recently conducted "West Side Stories" fundraiser	See offline printed product for personal security reasons	External	PM support, will assist with storyteller grooming/practice	Low	Provide constructive feedback to PM	Email, phone as required	Extremely helpful sharing experiences and ideas; recent experience with "Anchorage West Side Stories"
AIJ Clients	AIJ clients	Various	Internal		Low	Meet fundraising goal	Generate publicity for AIJ	Will solicit volunteers through Robin to share their story for marketing talking points
Corporate Donors	Business donors	Various	External	Donate, network connections	Medium	Advertise donors	Will track separately by donor	Display logo of all donors at event
Other Business Donors	Business donors	Various	External	Donate, network connections	Medium	Advertise donors	Will track separately by donor	Display logo of all donors at event
Individual Donors	Individual donors	Various	External	Donate, network connections	Medium	Advertise donors	Will track separately by donor	
Event location business	Event location	Various	External	Donate services	Low	Clear date/time/setup plan	Email, phone as required	
Event attendees MSPM	Event attendees	Various	External	Support event, purchase auction items	Medium	Auction provides desirable items from local artists and businesses	Marketing tasks	
Course Cohorts	Classmates, peers	Various	External	Academic sounding board	Medium	Provide constructive feedback to cohort projects	Meet in person one week prior to each PPM deadline	Working primarily with Walter Y and Justin R

## Academic Requirements Traceability Matrix

**Project Manager: C. Forner**

**Project Name: AIJ Fundraising and Non-Profit Analysis Project**

ID #	Requirement	Priority	Supported Objective/goal/purpose	WBS Work Package Reference	Acceptance Criteria	Validation method	Validation Status	Risk Register Reference	Key Dependencies, Impacts, Constraints	Remarks
1	Create PMP that meets academic requirements	Medium			Pass go/no-go decision points	Notified by academic committee	Open Passing as of 20 Nov 15	NA	Time constraint, time mgt & dynamic scheduling req'd	
2	Complete research paper that contributes to PM body of knowledge	Medium	Contribute to PM body of knowledge	7.2.3 7.2.8 7.2.11-14	"A" grade	PPM grades	Open	R7	Time constraint, time mgt & dynamic scheduling req'd	
3	Demonstrate mastery of PM principles and practices	High	ID/analyze PM tools useful to AIJ, evaluate KAs	7.3.1	"A" grade	PPM grades	Open	R7	Focus on KA and weekly metrics analysis	
4	Create/present compelling 686A PMP presentation	Low	Complete research, contribute to PM body of knowledge	7.1.16-18	"A" grade	Presentatio n grade	Open	NA	Time constraint	
5	Create/present compelling 686B presentation	Low	Complete research, contribute to PM body of knowledge	7.2.15-16	"A" grade	Presentatio n grade	Open	NA	Time constraint	



**Product Requirements Traceability Matrix**

Project Manager: C. Forner										
Project Name: AIJ Fundraising and Non-Profit Analysis Project										
ID #	Requirement	Priority	Supported Objective/goal/purpose	WBS Work Package Reference	Acceptance Criteria	Validation method	Validation Status	Risk Register Reference	Key Dependencies, Impacts, Constraints	Remarks
1	Complete project event safely	High	Execute event, generate positive publicity	7.1.1	PM decision	PM validates	Open	NA	See risk matrix	
2	Meet project performance expectations	Medium	ID/analyze PM tools	7.3.1	"A" grade	PPM grades	Open	R1-7	See KAs and MMP	
3	Develop a plan that produces \$5,000 gross profit	High	Execute fundraising event, generate AIJ funds	7.1.5	Gross over \$5K	AIJ exec confirms	Open	R2-3	Result relies on good will, good advertising to gain attendance, community engagement to solicit auction item donations	
5	Generate future AIJ donors	Medium	Raise awareness and positive publicity, cultivate donors	2.1-2.7	Create VIP list approved by AIJ	AIJ exec approves	Open	R2	Result relies on good will, good advertising to gain attendance, community engagement to solicit auction item donations	
6	Produce well defined/thorough continuity documents for AIJ	Medium	Provide AIJ tools for repeatable event	6.1-6.3 7.2.12	PM decision	AIJ validates during final feedback	Open	R5	Time and AIJ stakeholder availability constraints	
7	Identify recommended PM tools for AIJ	Low	Provide AIJ tools for repeatable event	6.1-6.3 7.2.12	PM decision	AIJ validates during final feedback	Open	R5	Time and AIJ stakeholder availability constraints	
8	Comply with local, state, and federal fundraising regulations	Medium	Generate funds and positive publicity	3.3, 3.10, 3.12	AIJ Fundraising committee decision	AIJ Fundraising committee validates during planning meetings	Open	R1, R5, R6	Relies on AIJ fundraising volunteer expertise and availability	
9	Gain event attendance of 200 or more people	Medium	Raise awareness, generate funds	2.1-2.7	Head count	AIJ exec confirms	Open	R3	Result relies on good will, good advertising and community engagement to gain attendance	
10	Produce effective advertising flyer(s)	Low	Raise awareness and positive publicity	1.3-1.4	AIJ exec decision	AIJ exec approves	Open	R5	AIJ stakeholder availability constraint	
11	Produce compelling talking points for advertising/marketing events	Medium	Raise awareness and positive publicity	2.2	AIJ exec decision	AIJ exec approves	Open	R5	AIJ stakeholder availability constraint	
12	Target key business, political, and community leaders with VIP invitation list	High	Cultivate donors	2.3-2.4	AIJ exec decision	AIJ exec approves	Open	R5	AIJ stakeholder availability constraint	
13	Secure event location willing to donate venue	Medium	Execute fundraising event, generate AIJ funds	3.1-3.2	PM decision	PM validates	Open	R4	Relies on goodwill donation from local population, use opportunity of donor networking	
14	Gain permission/willingness from AIJ clients to tell their story as part of marketing	Medium	Raise awareness and positive publicity	2.2	AIJ exec decision	AIJ exec approves	Open	R5	AIJ stakeholder availability constraint	
15	Find creative donation sources for silent auction items	Medium	Cultivate donors	1.5	PM decision	PM validates	Open	R2	Relies on goodwill donations from local population, use opportunity of donor networking	
16	Find community immigrants willing to share their story with the Anchorage community (7 total stories for 7 minutes each)	Medium	Cultivate donors	4.1-4.1	PM decision	PM validates	Open	NA		
17	Provide method to prepare storytellers to present at the event	Medium	Raise awareness and positive publicity	4.3	PM decision	PM validates	Open	NA		

## AIJ Fundraiser Project Change Control Log

**Project Manager: C. Forner**

**Project Name: AIJ Fundraiser and Non-Profit Analysis**

Date	Change Required	Originator	Remarks/Action Required	Status	Completion Date
23-Sep-15	Revise all products to-date to reflect project product: local artist performance venue, entry/cover charge, silent auction, food/beverages at event	AIJ Fundraising Committee	Major PMP revisions driven by scope change	Closed	23-Oct-15
20-Nov-15	Revise products per PPM #1-3 feedback and cohort recommendations	Academic committee, student cohorts	Major PMP revisions driven by feedback (see issues log entries for details)	Closed	20-Nov-15
18-Jan-16	Minor scope change: revise all products to-date to reflect project product change. Performance will now be 6-10 immigrant volunteer speakers to present their stories in 5 to 10 minutes each.	AIJ Executive Director	Minor MS Project and PMP revisions to change tasks. No change to total schedule duration.	Closed	25-Jan-16
29-Jan-16	Major scope change--event date moving to 12 April or later due to AIJ executive director travel.	AIJ Executive Director	Major revisions to product deliverables, project milestones, and CSFs. Planning the event and providing event checklist and continuity binder remain in scope, executing the event is now outside the scope of the project because event date is past academic deliverable date. Will rebaseline schedule.	Closed	4-Feb-16
21-Feb-16	Minor task additions--storyteller grooming and Facebook event page	Arctic Entries stakeholder s	Minor revisions to MS Project; PM schedule availability adjusted for Facebook tasks; PM added task 2.1 Facebook task, change task 2.3 to read "Generate talking points (a deliverable) instead of "client profile pamphlet (was named incorrectly only). PM changed task 4.3 from "Coord and conduct event" to "Coord and conduct speaker practice." PM will not rebaseline project at this time.	Closed	26-Feb-16
9-Mar-16	Minor task change- remove task 3.13 "Create event signs"	TapRoot stakeholder s	After discussion with TapRoot event planner, PM removed/deleted task 3.13 because it was unnecessary. TapRoot will use existing flyer and FB page for advertising (this task was necessary when event was on campus).	Closed	14-Mar-16
12-Mar-16	One task scheduled after PPM #4	Carol	Remove task complete presentation (2 hours, 18 April)	Closed	14-Mar-16

AIJ Fundraiser Project Issues Log					
Project Manager: C. Forner					
Project Name: AIJ Fundraiser and Non-Profit Analysis					
Date	Issue	Originator	Remarks/ Action Required	Status	Refer to Change Log?
3-Sep-15	Discussed project fundraiser ideas with Anastacia and fundraising committee. Proposals are: silent auction, campaign event, concert, gala, park strip festival, cookoff/BBQ	Anastacia	AIJ committee wants event to be client-inclusive, unlike the traditional November "Mind Games" trivia fundraiser. I'll draft four formal fundraising event possibilities with detailed product deliverables and email to fundraising committee	Closed--emailed to committee 8 Sep 15	No
11-Sep-15	No final decision from committee yet. I pressed with "Silent Auction" project template to fulfill PPM#1 requirements	Carol	May need to change MS schedule and update all PMP products upon committee project decision	Closed--Meeting with Sarah and Mai La 23 Sep--ref 23 Sep Issue	No
17-Sep-15	Bi-weekly meeting with AIJ fundraising committee--still no decision on exact project specifications	Carol	I'll follow up with Sarah on committee next week	Closed--info note only--track status of previous issue	No
23-Sep-15	Decision! Project will be a venue including local artist performances, entry/cover charge, silent auction, food/beverages provided	Sarah	Sarah sent out my written event descriptions to all AIJ employees, who all voted on preferred event. Result is a hybrid of two events (artist performance venue and silent auction). I appreciate the AIJ employee stakeholder buy-in! Note, raffle during event was ruled out due to raffle license requirement	Closed	Yes
1-Oct-15	PPM#1 feedback	Academic committee	Refer PPM#1 feedback to change control log to formally track PMP changes required	Closed	Yes, consolidated all PPM feedback into one tracked change and updated prior to PPM#4
1-Oct-15	Meeting with AIJ Fundraising Committee: I was asked to present the project to the next Board meeting on Wed 7 Oct	Anastacia	Record any board member inputs or questions--could lead to change requests	Closed	No
1-Oct-15	Stakeholder ID--need more analysis of power, proximity	Academic Committee	See PPM#1 scoresheet	Closed	No
1-Oct-15	Stakeholder ID--AIJ client needs	Academic Committee	See PPM#1 scoresheet; included update in Scope statement update, need to update Stakeholder matrix and mgt plan	Closed	No
1-Oct-15	Stakeholder ID--scrub list to ensure net has been cast wide enough	Academic Committee	Incorporate in Stakeholder matrix and mgt plan	Closed	No
1-Oct-15	Revise charter to include product acceptance criteria of stakeholders (beyond just exec and board), more measureable than current CSFs	Academic Committee	Charter and MMP - Include measures for community support, engagement, awareness	Closed--Charter update 6 Oct 15	No
1-Oct-15	Incorporate risks of insufficient inputs, unwillingness to participate	Academic Committee	Risk register, risk management plan updates	Closed	No
1-Oct-15	Charter--include more info on AIJ mission	Academic Committee	Charter overview	Closed--Charter update 6 Oct 15	No
1-Oct-15	Include task to test tools/templates under "Continuity for AIJ"	Academic Committee	Update WBS and schedule	Closed	No
1-Oct-15	Include more data on how AIJ serves clients, their specific needs	Academic Committee	Update scope statement purpose info--includes more info on how grant vs unrestricted funds are used	Closed	No
6-Oct-15	Updated charter, sent to AIJ BP and Exec. Requested event date of 7 or 14 Apr	Carol	Follow up on date at board meeting on 7 Oct 15	Closed	No

AIJ Fundraiser Project Issues Log					
Project Manager: C. Forner					
Project Name: AIJ Fundraiser and Non-Profit Analysis					
Date	Issue	Originator	Remarks/ Action Required	Status	Refer to Change Log?
30-Oct-15	Cohort feedback from Justin Ramsey and Walter Youlo	Student cohorts	Include more cost details, update RTM, staffing plan should include volunteers needed on event night, procurement should include transfer of art piece ownership	Closed	No
6-Nov-15	PPM#2-3 feedback	Academic Committee	Need more depth and comprehensiveness (and passion!) throughout purpose and scope, address event theme	Closed	Yes, consolidated all PPM feedback into one tracked change and updated prior to PPM#4
19-Nov-15	Tried to apply PERT analysis expected task durations to schedule but could not figure it out. I used hours for task duration and have the PM resource very precisely designated for work hours each day. It is generally 4 hours per day, but varies week to week. This may be why I can't figure out a clean way to apply expected duration.	Carol	I'll need to get with Roger prior to final presentation. - He recommended updating expected durations in MS Project—done.	Closed	No
1-Dec-15	Presentation feedback: consider risk of hostile community to immigrants and project	Roger	Need to discuss further with Roger. This will most likely be a risk to just accept. - Yes, added risk.	Closed	No
1-Dec-15	Presentation feedback: attempt to handle board member change requests with consensus from entire board to help control high impact stakeholders that may be currently disengaged	LuAnn	Readdress in stakeholder management plan	Closed	No
4-Feb-16	After rebaselining schedule and auto rescheduling unfinished tasks, MS Project metrics (SPI .63, SV-37) look incorrectly low.	Carol	Review MS Project fundamentals and ensure the schedule is correct. (potentially the EVM setting in backdoor options)	Closed after PPM#2	No
4-Feb-16	Need to add as "security discussion" mitigation task 3.12.1. under final planning meeting task	Carol	Add to MS Project	Closed	No
15-Feb-16	Add storyteller grooming tasks to schedule	Carol	Recommended by Arctic Entries experienced stakeholders; PM will not rebaseline	Closed	Yes
15-Feb-16	Add Facebook event page and ticket link tasks to schedule	Carol	Recommended by Arctic Entries experienced stakeholders; PM will not rebaseline	Closed	Yes
21-Feb-16	Noticed on deliverables dashboard, from MS Project dates, that some of the dates are still tied to the original event date of 7 April. Need to adjust schedule since event itself is now outside scope.	Carol	Fix no later than dates and successors/predecessors in MS Project	Closed after PPM#2	No
24-Feb-16	Add "Actual Impact" column to risk matrix	Carol	Suggestion from PM605, comment in final report	Closed	No
4-Mar-16	Five tasks are scheduled to complete 7-8 April and are overallocated.	Carol	The tasks: storyteller practice, PPM#4, analyze project lessons learned, complete report, and prepare final presentation, are all at the end of the week on 7-8 April. These tasks are overallocated and need to be rescheduled to a weekend prior to 8 April to finish these tasks and complete proper project closeout in accordance with the PMP.	Closed	No
12-Mar-16	One task scheduled after PPM #4	Carol	Remove task complete presentation (2 hours, 18 April)	Closed	Yes

## Weekly Metrics Tracking Log - Project Execution

Project Manager: C. Forner

Project Name: AIJ Fundraising and Non-Profit Analysis Project

DATE	SPI Cumulative	SV %	Duration Variance	SHM (1-5 Scale)	SHM (# change requests)	Comm (1-5 Scale)	Quality	REMARKS
22-Jan-16	0.77	-23	15.5 days (silent auction tasks)	2	2	3	4	Metrics outside threshold, mainly due to delay in "set event date" due to unknown AIJ exec director schedule. PM chose to update project by using "reschedule tasks" option.
29-Jan-16	0.72	-28	40.25 (total project)	2	2	4	4	Metrics still outside threshold due to delay in setting new date, which is holding up follow on tasks (flyer, solicit donations). PM chose to again update project by using "reschedule task" option under "Update Project." Also leveled resources after rescheduling tasks.
5-Feb-16	0.63	-37	5 days (total project)	2	2	3	4	Rebaselined schedule on 4 Feb 16. These metrics occurred after major scope change removing "Hold Fundraising Event" and subtasks from project. Although the schedule metrics are outside the threshold, PM needs to conduct further analysis of metrics, as this may be due to missteps in MS Project.
12-Feb-16	0.94	-6	0 days	3	1	3	4	Problem with previous metrics was failure to reset EVM rebaseline in MS Project backdoor options.1 minor change (venue location). SV out of tolerance due to PM deciding to move low priority task (VIP mailing list) and waiting for event flyer coordination
19-Feb-16	0.9	-10	0 days	3	1	3	4	SV% out of threshold due to -100% variance in R7 risk realization added (new survey) and -100% in PPM#2 deliverables with incorrect due date of 19 Feb. Minor change to 1 task 4.3 "Coordinate and conduct event speaker practice." No other action taken at this time.
26-Feb-16	0.96	-4	0 days	3	1	3	4	Actual report date is 24 Feb (early due to schedule conflicts over next two days). Minor change of addition of event facebook page creation.
4-Mar-16	0.97	-3	-4 days	4	0	4	4	SV% and duration variance due to behind on several marketing deliverables (VIP list, publicity points, schedule 3 PR events) due to awaiting 21 Mar meeting with AIJ to discuss. PM chose not to take further action. See notes in narrative for action taken for numerous overallocated resource tasks.
11-Mar-16	0.93	-7	0 days	4	1	4	4	Change request from PM to remove unnecessary tasks. See narrative for more info.
18-Mar-16	0.92	-8	0 days	3	1	4	4	Data as of 16 Mar to include in draft research report. Downgrade in SHM and Comm due to unavailability of key SH and PM choice not to email but wait until 21 Mar meeting. This held up marketing tasks which contributed to -8% SV. PM will tak no further action until after 21 Mar meeting.
25-Mar-16	0.9	-10	0	3	0	3	3	21 Mar AIJ meeting feedback--good products, except VIP list needs email addresses--reason for 3 SHM, Comm, Qual scores
1-Apr-16	0.91	-9	0	4	0	4	4	SHM and Comm going well, updated VIP list, no major changes from last week, updated one task
8-Apr-16	0.99	-1	0	4	0	4	4	Final stats from 7 Apr (note, signed off 7 Apr meeting in a.m.) Open tasks: Final planning meeting 12 Apr (0%), analyze lessons learned (50%), closure complete lessons learned (50%)

Attach each PPM MS Project Statistics here:

Project Statistics for 'Forner - AIJ Project (Update 5 Feb 16)'

	Start	Finish
Current	T 10/13/15	M 4/25/16
Baseline	T 10/13/15	M 4/18/16
Actual	T 10/13/15	NA
Variance	0d	5d

	Duration	Work	Cost
Current	140d	384.25h	\$384.26
Baseline	135d	378.28h	\$378.28
Actual	53.43d	150.3h	\$150.30
Remaining	86.57d	233.97h	\$233.96

Percent complete:  
 Duration: 38%    Work: 39%   

Project Statistics for 'Forner - AIJ Project (Update 16 Mar 16)'

	Start	Finish
Current	T 10/13/15	T 4/19/16
Baseline	T 10/13/15	M 4/18/16
Actual	T 10/13/15	NA
Variance	0d	0d

	Duration	Work	Cost
Current	136d	304.55h	\$304.56
Baseline	135d	378.28h	\$378.28
Actual	116.41d	244.67h	\$244.66
Remaining	19.59d	59.9h	\$59.90

Percent complete:  
 Duration: 86%    Work: 80%   

Project Statistics for 'Forner - AIJ Project (Update 26 Feb 16)'

	Start	Finish
Current	T 10/13/15	M 4/25/16
Baseline	T 10/13/15	M 4/18/16
Actual	T 10/13/15	NA
Variance	0d	0d

	Duration	Work	Cost
Current	140d	351.7h	\$351.71
Baseline	135d	378.28h	\$378.28
Actual	91.84d	192.68h	\$192.69
Remaining	48.16d	159.02h	\$159.02

Percent complete:  
 Duration: 66%    Work: 55%   

Project Statistics for 'Forner - AIJ Project (Update 7 Apr 16)'

	Start	Finish
Current	T 10/13/15	T 4/19/16
Baseline	T 10/13/15	M 4/18/16
Actual	T 10/13/15	NA
Variance	0d	0d

	Duration	Work	Cost
Current	136d	304.55h	\$304.56
Baseline	135d	378.28h	\$378.28
Actual	135.53d	300.5h	\$300.51
Remaining	0.47d	4.05h	\$4.05

Percent complete:  
 Duration: 99%    Work: 99%

## Project Deliverables Status Dashboard - as of 24 Apr 16

**Project Manager:** C. Forner

**Project Name:** AIJ Fundraising and Non-Profit Analysis Project

Deliverable	Due Date	Percent Complete	Status	Remarks
Final PM686B research report/draft presentation	8-Apr-16	100		
PPM#1 Deliverables	5-Feb-16	100		
PPM#2 Deliverables	26-Feb-16	100		
PPM#3 Deliverables	18-Mar-16	100		
PPM#4 Deliverables	8-Apr-16	100		
Event checklist	21-Mar-16	100		
Event flyer/Facebook Event Page	8-Feb-16	100		Late due to event date change, original due date prior to rebaseline/reschedule was 27 Jan; added task to create Facebook event page. New ECD: 28 Feb Completed 6 Mar
Publicity talking points	12-Mar-16	100		Awaiting 21 Mar meeting w/ Exec Director
Invitations and VIP mailing list	21-Mar-16	100		Awaiting 21 Mar meeting w/ Board Pres and Exec Director
Choose/reserve event location	26-Jan-16	100		TapRoot
Schedule 3 marketing/publicity events	12-Mar-16	100		Awaiting 21 Mar meeting w/ Exec Director. AK Public Media, KTUU, KTVA, Anchorage Press, multiple on line calendar posts (see deliverables excel product)
Solicit 7 volunteer speakers for event night	2-Apr-16	100		5 volunteers to-date, 1 additional volunteer tentative
Solicit 25-30 silent auction donation items	30-Mar-16	100		Distributed 35 donor request letters, follow up week of 21 Mar. As of 8 Apr, PM has 18 items and 12 board members will each bring one item--will continue to collect items next week.
Hold planning meetings	13-Apr-16	100		Final meeting scheduled 12 Apr
Post event announcements	22-Mar-16	100		Will tie in to Facebook page See "Ad List" worksheet in excel product deliverables
Organize event setup and teardown	1-Apr-16	100		Discuss at 21 Mar and 12 Apr meetings
Designate event volunteers	1-Apr-16	100		Board president will handle
Provide AIJ with event continuity documents	5-Apr-16	100		Binder/CD complete

**PERT Calculations**

Project Manager: C. Forner

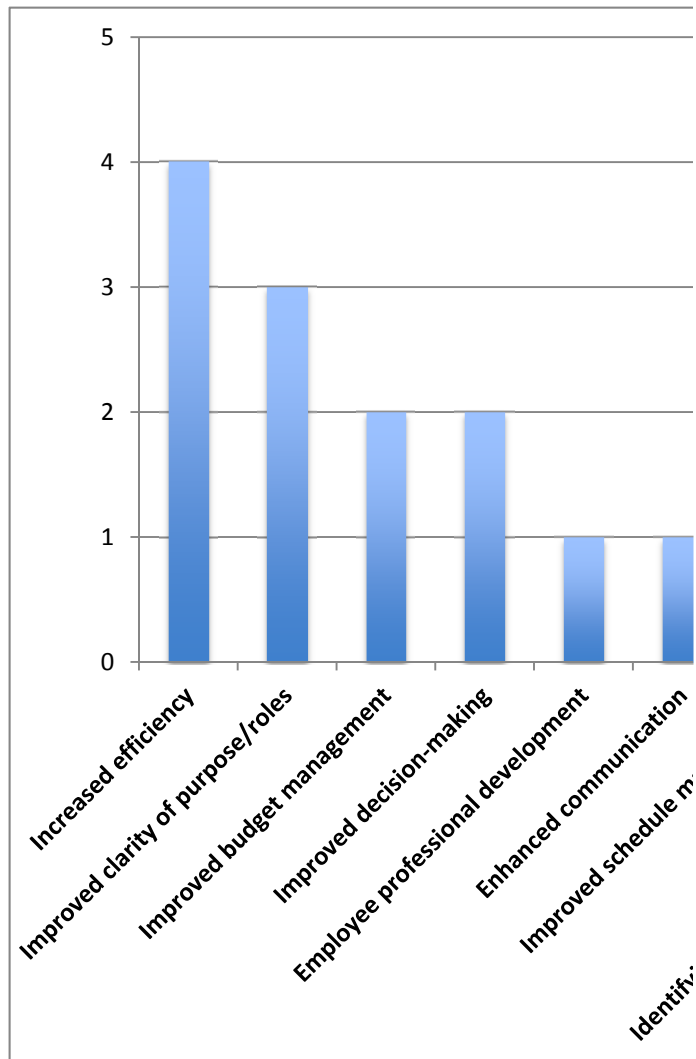
Project Name: AIJ Fundraising and Non-Profit Analysis Project

WBS	TASK	MOST LIKELY DURATION	ML in Hrs	PESSIMISTIC DURATION (Hrs)	OPTIMISTIC DURATION (Hrs)	EXPECTED DURATION [(O+4*ML+P)/6] (50% Certainty)	STANDARD DEVIATION (P-O)/6	TASK VARIANCE	RISK ID #	Baseline Start	Baseline Completion
	Forner - AIJ Project (Update 20 Nov 15)	135 days								T 10/13/15	M 4/18/16
<b>1</b>	<b>Fundraising - Silent Auction</b>	<b>17 days</b>								M 1/11/16	T 2/2/16
1.1	Generate list of potential silent auction item donors	10	10	11	9	10.0	0.33	0.11		M 1/11/16	T 1/12/16
1.2	Set event date w/ AIJ	0	0	0	0	0.0	0.00	0.00		T 1/12/16	T 1/12/16
1.3	Generate flyer for donors and marketing	4	4	4	4	4.0	0.00	0.00		T 1/12/16	W 1/13/16
1.4	AIJ approve flyer	0	0	0	0	0.0	0.00	0.00		W 1/13/16	W 1/13/16
1.5	Solicit donations	40	40	80	30	45.0	8.33	69.44	R1, R2	F 1/15/16	M 1/25/16
1.6	Follow up with donors (email, phone)	8	8	10	8	8.3	0.33	0.11	R2	M 2/1/16	T 2/2/16
1.7	Create donor/sponsor display for event	4	4	4	4	4.0	0.00	0.00		T 2/2/16	T 2/2/16
1.8	Complete Silent Auction Fundraising	0	0	0	0	0.0	0.00	0.00		T 2/2/16	T 2/2/16
<b>2</b>	<b>Marketing</b>	<b>47.88 days</b>								T 1/14/16	T 3/22/16
2.1	Schedule AIJ exec radio/TV interviews	4	4	8	3	4.5	0.83	0.69	R5	T 1/26/16	T 1/26/16
2.2	Generate client profile pamphlet	4	4	4	4	4.0	0.00	0.00		T 1/26/16	W 1/27/16
2.3	Create event invitations and VIP list	4	4	6	3	4.2	0.50	0.25	R5	T 1/14/16	F 1/15/16
2.4	AIJ approve VIP list	0	0	0	0	0.0	0.00	0.00	R5	F 1/15/16	F 1/15/16
2.5	Print/mail VIP invitations	4	4	4	4	4.0	0.00	0.00		M 3/21/16	M 3/21/16
2.6	Disseminate event marketing flyer	4	4	4	4	4.0	0.00	0.00		T 3/22/16	T 3/22/16
2.7	Complete marketing	0	0	0	0	0.0	0.00	0.00		M 3/21/16	M 3/21/16
<b>3</b>	<b>Venue Planning</b>	<b>49.13 days</b>								M 1/25/16	F 4/1/16
3.1	Identify potential donor venue locations	4	4	8	3	4.5	0.83	0.69	R1, R2, R4	M 1/25/16	T 1/26/16
3.2	Reserve venue	1	1	1	1	1.0	0.00	0.00		W 1/27/16	W 1/27/16
3.3	Research venue capacity, permits if required	2	2	2	2	2.0	0.00	0.00		T 2/4/16	T 2/4/16
3.4	Research venue source for tables, chairs	2	2	2	2	2.0	0.00	0.00		M 2/15/16	M 2/15/16
3.5	Identify potential food/drink event donors	4	4	5	3	4.0	0.33	0.11	R2	W 2/3/16	W 2/3/16
3.6	Secure food/drink donor	4	4	5	3	4.0	0.33	0.11	R2	M 2/15/16	M 2/15/16
3.7	Secure microphone/speaker for event	2	2	2	2	2.0	0.00	0.00		F 2/12/16	F 2/12/16
3.8	Request AIJ volunteers for event	2	2	2	2	2.0	0.00	0.00		W 1/27/16	W 1/27/16
3.9	Secure AIJ volunteers for event	2	2	4	2	2.3	0.33	0.11	R6	M 2/1/16	M 2/1/16
3.1	Schedule/hold initial planning committee meeting	2	2	2	2	2.0	0.00	0.00		T 2/2/16	T 2/2/16
3.11	Create event signs	4	4	4	4	4.0	0.00	0.00		M 2/15/16	T 2/16/16
3.12	Hold final planning committee meeting	2	2	2	2	2.0	0.00	0.00		F 4/1/16	F 4/1/16
3.13	Complete venue planning	0	0	0	0	0.0	0.00	0.00		F 4/1/16	F 4/1/16
<b>4</b>	<b>Artist Venue Participation</b>	<b>44 days</b>								W 2/3/16	M 4/4/16
4.1	Research local artist contacts and ideas	4	4	4	4	4.0	0.00	0.00		W 2/3/16	W 2/3/16
4.2	Solicit artists to donate performances at event	20	20	40	18	23.0	3.67	13.44	R1, R2	T 2/4/16	T 2/9/16
4.3	Secure venue event artist performances	8	8	8	8	8.0	0.00	0.00		M 4/4/16	M 4/4/16
4.4	Complete artist venue participation	0	0	0	0	0.0	0.00	0.00		M 4/4/16	M 4/4/16
<b>5</b>	<b>Hold Fundraising Event</b>	<b>0.38 days</b>								T 4/7/16	T 4/7/16
5.1	Setup event	1	1	1	1	1.0	0.00	0.00		T 4/7/16	T 4/7/16
5.2	Conduct event	2	2	2	2	2.0	0.00	0.00		T 4/7/16	T 4/7/16
5.3	Complete event	0	0	0	0	0.0	0.00	0.00		T 4/7/16	T 4/7/16
<b>6</b>	<b>Produce Continuity Documents for AIJ</b>	<b>66.25 days</b>								W 1/13/16	T 4/14/16
6.1	Initiate event checklist/binder for AIJ	8	8	8	8	8.0	0.00	0.00		W 1/13/16	T 1/14/16
6.2	Revise event checklist/binder for AIJ	8	8	8	8	8.0	0.00	0.00		T 2/16/16	W 2/17/16
6.3	Complete event checklist/binder for AIJ	4	4	4	4	4.0	0.00	0.00		T 4/14/16	T 4/14/16
<b>7</b>	<b>Project Management</b>	<b>135 days</b>								T 10/13/15	M 4/18/16
7.1	PM686A Tasks	29.44 days								T 10/13/15	M 11/23/15

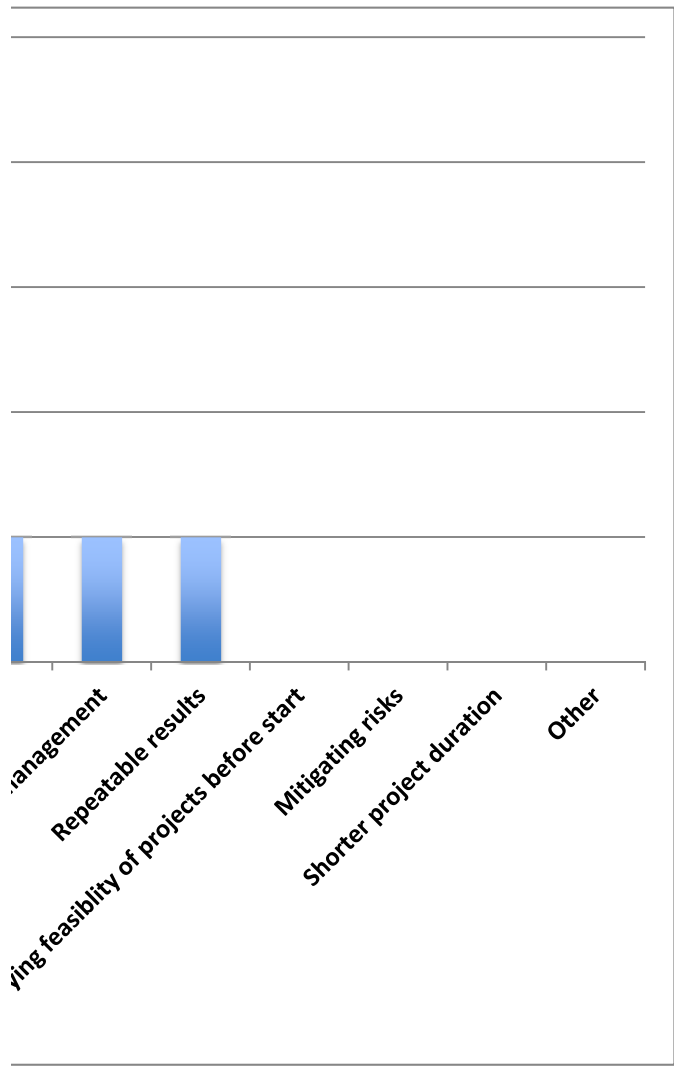


WBS	TASK	MOST LIKELY DURATION	ML in Hrs	PESSIMISTIC DURATION (Hrs)	OPTIMISTIC DURATION (Hrs)	EXPECTED DURATION [(O+4*ML+P)/6] (50% Certainty)	STANDARD DEVIATION (P-O)/6	TASK VARIANCE	RISK ID #	Baseline Start	Baseline Completion
7.1.1	Develop Risk Mgt and PERT	6	6	6	6	6.0	0.00	0.00		T 10/13/15	T 11/19/15
7.1.2	PMP subplans revisions #1	4	4	4	4	4.0	0.00	0.00		W 10/14/15	W 10/14/15
7.1.3	PMP Subplans revisions #2	4	4	4	4	4.0	0.00	0.00		T 10/15/15	T 10/15/15
7.1.4	Abstract revisions	1	1	1	1	1.0	0.00	0.00		F 10/16/15	F 10/16/15
7.1.5	Schedule revisions (CP) and Gantt	1	1	1	1	1.0	0.00	0.00		F 10/16/15	F 10/16/15
7.1.6	Research methods and outcomes	2	2	2	2	2.0	0.00	0.00		F 10/16/15	F 10/16/15
7.1.7	Update KA Data	4	4	4	4	4.0	0.00	0.00		F 10/23/15	F 10/23/15
7.1.8	Final PPM#3 revisions/post to BB	4	4	4	4	4.0	0.00	0.00		F 10/23/15	F 10/23/15
7.1.9	Send research methods to advisor for approval	0.25	0.25	0.25	0.25	0.3	0.00	0.00		F 10/23/15	F 10/23/15
7.1.10	PMP subplans revisions #3	24	24	24	24	24.0	0.00	0.00		M 10/26/15	M 11/2/15
7.1.11	Update KA Data	8	8	8	8	8.0	0.00	0.00		M 11/9/15	T 11/10/15
7.1.12	Presentation Prep	8	8	8	8	8.0	0.00	0.00		M 11/16/15	T 11/17/15
7.1.13	Identify KA's for 686B	4	4	4	4	4.0	0.00	0.00		W 11/18/15	W 11/18/15
7.1.14	Schedule refining	6	6	6	6	6.0	0.00	0.00		W 11/18/15	T 11/19/15
7.1.15	Research revisions from advisor	4	4	4	4	4.0	0.00	0.00		F 11/6/15	F 11/6/15
7.1.16	Final PMP, presentation, research revisions	30	30	30	30	30.0	0.00	0.00		M 11/9/15	F 11/20/15
7.1.17	PPM#4 post to BB	0.5	0.5	0.5	0.5	0.5	0.00	0.00		F 11/20/15	F 11/20/15
7.1.18	Presentation Rehearsal	4	4	4	4	4.0	0.00	0.00		F 11/20/15	M 11/23/15
7.2	<i>PM686B Tasks</i>	<i>68.75 days</i>								T 1/12/16	S 4/16/16
7.2.1	Schedule interviews with AIJ key stakeholders	1	1	1	1	1.0	0.00	0.00		T 1/12/16	T 1/12/16
7.2.2	Interview/survey stakeholders	4	4	4	4	4.0	0.00	0.00		T 1/12/16	T 1/12/16
7.2.3	Analyze scholarly literature on non-profits	16	16	30	14	18.0	2.67	7.11	R7	T 2/9/16	F 2/12/16
7.2.4	PPM#1 Tasks	10	10	10	10	10.0	0.00	0.00		W 1/27/16	F 1/29/16
7.2.5	PPM#2 Tasks	10	10	10	10	10.0	0.00	0.00		W 2/17/16	F 2/19/16
7.2.6	PPM#3 Tasks	10	10	10	10	10.0	0.00	0.00		W 3/9/16	F 3/11/16
7.2.7	PPM#4 Tasks	10	10	10	10	10.0	0.00	0.00		T 4/14/16	F 4/15/16
7.2.8	Analyze project lessons learned	2	2	2	2	2.0	0.00	0.00		T 4/7/16	T 4/7/16
7.2.9	Conduct & Analyze AIJ Customer Satisfaction Survey	8	8	12	7	8.5	0.83	0.69	R5	F 4/15/16	S 4/16/16
7.2.10	Draft report	30	30	30	30	30.0	0.00	0.00		T 4/7/16	S 4/10/16
7.2.11	Review draft report with academic committee	2	2	2	2	2.0	0.00	0.00		S 4/10/16	S 4/10/16
7.2.12	Review draft report & lessons learned with AIJ key lead	2	2	2	2	2.0	0.00	0.00		S 4/10/16	S 4/10/16
7.2.13	Revise report	8	8	8	8	8.0	0.00	0.00		S 4/10/16	M 4/11/16
7.2.14	Complete report	8	8	8	8	8.0	0.00	0.00		M 4/11/16	T 4/12/16
7.2.15	Prepare final presentation	8	8	8	8	8.0	0.00	0.00		T 4/12/16	W 4/13/16
7.2.16	Complete presentation	2	2	2	2	2.0	0.00	0.00		W 4/13/16	T 4/14/16
7.3	<i>Monitor &amp; Control (LOE Tasks)</i>	<i>135 days</i>								T 10/13/15	M 4/18/16
7.3.1	Evaluate KA's	135 days								T 10/13/15	M 4/18/16
7.3.2	Generate periodic status reports	135 days								T 10/13/15	M 4/18/16
7.4	<i>Project Closure</i>	<i>3.38 days</i>								T 4/12/16	S 4/17/16
7.4.1	Complete lessons learned	4	4	4	4	4.0	0.00	0.00		T 4/12/16	T 4/12/16
7.4.2	Consolidate final documents for ESPM	12	12	12	12	12.0	0.00	0.00		S 4/16/16	S 4/17/16
	<b>TOTAL (Hrs)</b>		<b>433.75</b>	<b>528.75</b>		<b>446.1</b>		<b>92.89</b>			
	<b>Add all task variance together and calc square root to get project standard deviation:</b>								<b>9.64</b>		

	AJJ	ANHC	ARC	
Increased efficiency	4	1	1	1
Improved clarity of purpose/roles	3		1	
Improved budget management	2	1		1
Improved decision-making	2	1	1	
Employee professional development	1			
Enhanced communication	1			
Improved schedule management	1			1
Repeatable results	1			
Identifying feasibility of projects before start				
Mitigating risks				
Shorter project duration				
Other				



Foraker	CSS	
	1	
	1	1
		1
		1
	1	



Risk Register

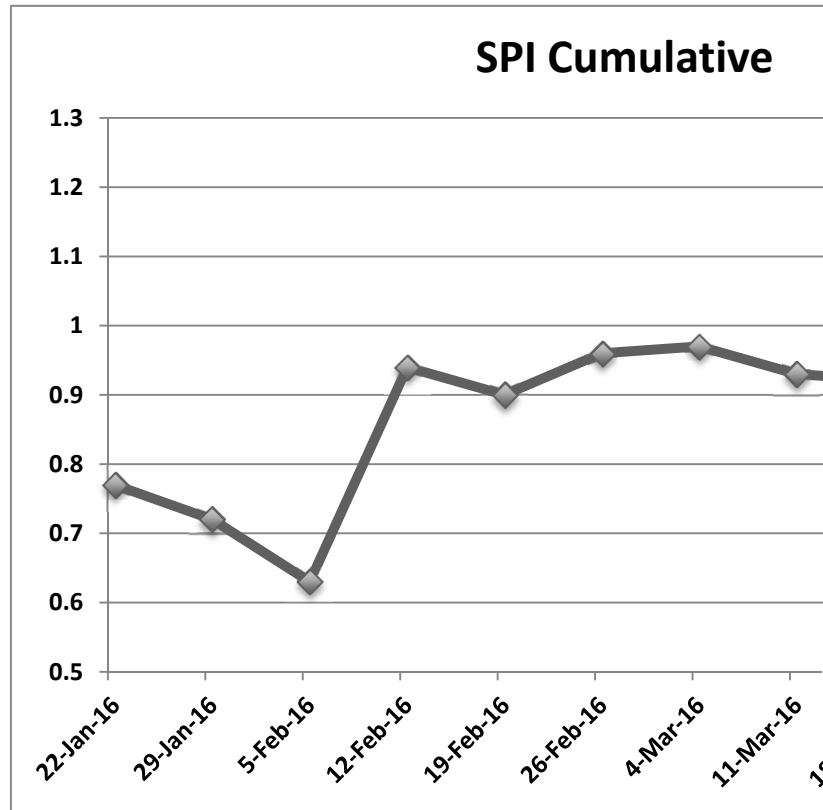
Project Manager: C. Forner

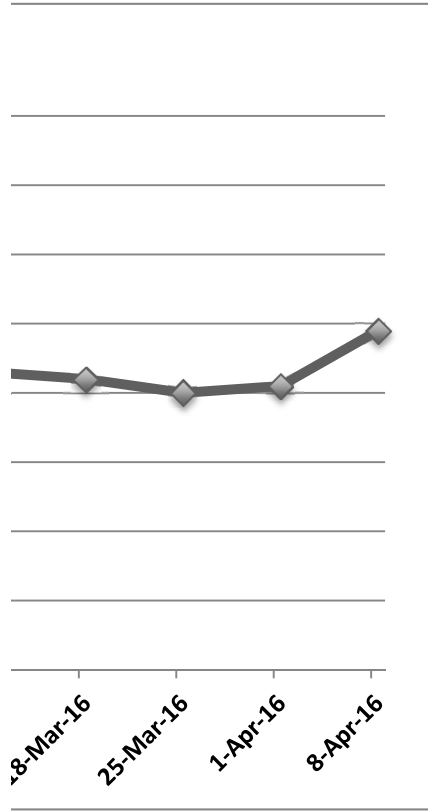
Project Name: AIJ Fundraiser and Non-Profit Analysis

WBS	Risk ID #	Risk Name	Description of Risk	Effect on Scope	Effect on Cost	Effect on Duration	Likelihood 1=not likely 3=likely 5=very likely	Impact 1=negligible 3=Marginal 5=significant	Risk Level (L * I) 1-5 = Low 6- 9 = Mod 10+=High
ALL	R8	Event date change	Date may change due to key stakeholder availability	Changing reqmts			3	4	12
3.14	R9	Security concerns during marketing and event	Local population may dislike idea of immigrants and generate a security threat to volunteers during advertising campaign and event	Changing reqmts			1	5	5
ALL	R10	PM Availability	PM availability may be reduced by illness, jury duty, or other constraints.			Extend duration	3	2	6

<b>Response Type</b> (e.g. Mitigate, Transfer, Accept, etc.) and specific actions to be	<b>Risk Level AFTER Mitigation</b> (L * I) 1-5 = Low 6- 9 = Mod 10+=High	<b>Actual Effect</b>
Mitigate: establish firm date during planning phase	5	Removed deliverable "Event"
Accept: change requirements and modify schedule accordingly		
Accept: risk response to discuss additional security measures with AIJ; worst case cancel event if credible threat	5	
Accept: risk response is to work additional hours (original schedule is half-days and no weekends)		

DATE	SPI Cumulative
22-Jan-16	0.77
29-Jan-16	0.72
5-Feb-16	0.63
12-Feb-16	0.94
19-Feb-16	0.9
26-Feb-16	0.96
4-Mar-16	0.97
11-Mar-16	0.93
18-Mar-16	0.92
25-Mar-16	0.9
1-Apr-16	0.91
8-Apr-16	0.99





The goal of this risk review is to collect and analyze the project’s realized risks to lead to conclusive recommendations in the final risk realization closeout report. Any new risks identified will be added to the risk register for continuity. This closeout report results should demonstrate mastery of project management principles and methodology as well as add to the project management body of knowledge.

How results will lead to conclusive recommendations and proposals:

- Examine whether the PM risk management tools used in this project were effective
- Examine the effect of realized risks to project execution and final deliverables
- Examine root causes of realized risk and explore whether risk mitigation and responses are adequate for this project and what can be done better in the future
- Include risk mitigation and response suggestions to help AIJ maintain a repeatable fundraising event plan

**Risks realized since start of project execution phase:**

R8	Event date change	Date may change due to key stakeholder availability
R7	Research insubstantial	Initial research and survey results may be academically insubstantial

**Discussion of R8:**

This risk was NOT identified on the original risk register. The effect of this realized risk included significant scope change due to the event date moving later than the final 686B course deliverable due dates. The scope was tailored down to exclude the execution of the event. All other product deliverables to AIJ (event checklist, continuity binder) remain the same.

The root cause of this realized risk is inadequate planning. The planning phase should have included establishment of a firm event date. Instead, the execution phase included a task to determine event date with AIJ during January 2016. Since this project is extremely duration and



date driven, this task is scheduled too late in the project to effectively plan out the project and product deliverables.

Establishing the event date during the planning phase can mitigate this risk. However, the key AIJ stakeholders travel often and have dynamic travel schedules. This means that mitigation efforts will not completely eliminate this risk from future projects and future PMs must be prepared to react to event date changes.

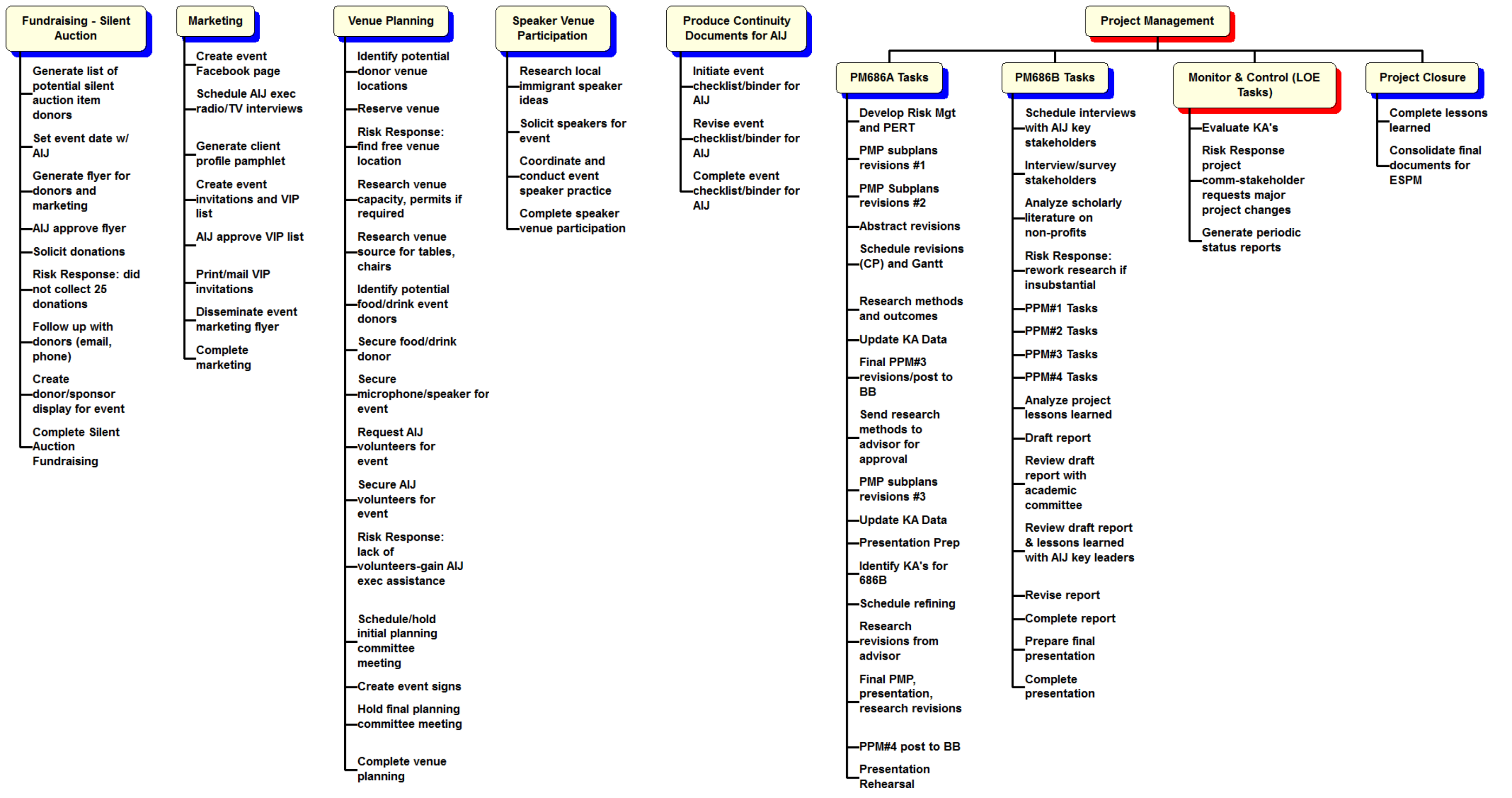
**Discussion of R7:**

The risk R7 was added at the beginning of the planning process. The PM was not convinced interview/survey results from the small pool of AIJ employees (there are four managers to take the survey, all others are attorneys or interpreters) would result in adequate data to make conclusions. The PM is going to implement R7 risk response, to include another survey of a larger group of Anchorage non-profits to attempt to determine their familiarity with PM tools and what they use currently. The hope of the researcher is that this will address the thesis question of whether there is a need or desire for PM training in the non-profit sector. This could be a local chapter PMI opportunity.

**Risks added to register since start of project execution phase:**

R8	Event date change	Date may change due to key stakeholder availability
R9	Security concerns during marketing and event	Local population may dislike idea of immigrants and generate a security threat to volunteers during advertising campaign and event
R10	PM Availability	PM availability may be reduced by illness, jury duty, or other constraints.

R8 is discussed above. R9 was added after PM686A presentation feedback. R10 was added after PM received notice of potential jury duty for week of 22-26 Feb.



**Fundraising - Silent Auction**

- Generate list of potential silent auction item donors
- Set event date w/ AIJ
- Generate flyer for donors and marketing
- AIJ approve flyer
- Solicit donations
- Risk Response: did not collect 25 donations
- Follow up with donors (email, phone)
- Create donor/sponsor display for event
- Complete Silent Auction Fundraising

**Marketing**

- Create event Facebook page
- Schedule AIJ exec radio/TV interviews
- Generate client profile pamphlet
- Create event invitations and VIP list
- AIJ approve VIP list
- Print/mail VIP invitations
- Disseminate event marketing flyer
- Complete marketing

**Venue Planning**

- Identify potential donor venue locations
- Reserve venue
- Risk Response: find free venue location
- Research venue capacity, permits if required
- Research venue source for tables, chairs
- Identify potential food/drink event donors
- Secure food/drink donor
- Secure microphone/speaker for event
- Request AIJ volunteers for event
- Secure AIJ volunteers for event
- Risk Response: lack of volunteers-gain AIJ exec assistance
- Schedule/hold initial planning committee meeting
- Create event signs
- Hold final planning committee meeting
- Complete venue planning

**Speaker Venue Participation**

- Research local immigrant speaker ideas
- Solicit speakers for event
- Coordinate and conduct event speaker practice
- Complete speaker venue participation

**Produce Continuity Documents for AIJ**

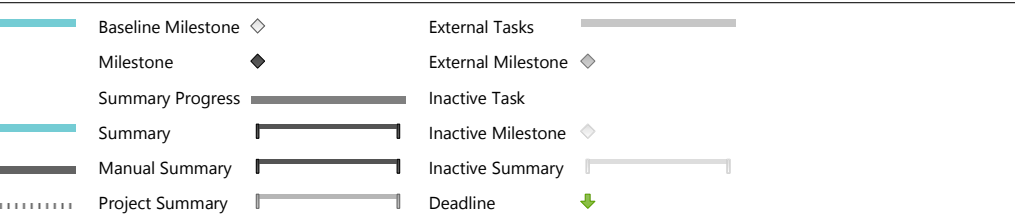
- Initiate event checklist/binder for AIJ
- Revise event checklist/binder for AIJ
- Complete event checklist/binder for AIJ

**Project Management**



Forner - AIJ Project (042416)

ID	WBS	Task Name	Duration	Actual Duration	Start	Finish	
0		<b>Forner - AIJ Project (Update 6 Apr 16)</b>	<b>136 days</b>	<b>136 days</b>	T 11/19/15	T 4/19/16	99%
1	1	<b>Fundraising - Silent Auction</b>	<b>46.34 days</b>	<b>46.34 days</b>	M 1/11/16	T 3/15/16	100%
2	1.1	Generate list of potential silent	10 hrs	10 hrs	M 1/11/16	T 1/12/16	100%
3	1.2	Set event date w/ AIJ	0 hrs	0 hrs	T 1/12/16	T 1/12/16	100%
4	1.3	Generate flyer for donors and	4 hrs	4 hrs	M 2/8/16	T 3/1/16	100%
5	1.4	AIJ approve flyer	0 days	0 days	T 3/1/16	T 3/1/16	100%
6	1.5	Solicit donations	45 hrs	45 hrs	T 3/1/16	W 3/9/16	100%
7	1.6	Risk Response: did not collect 25	12 hrs	0 hrs	W 3/9/16	S 3/12/16	
8	1.7	Follow up with donors (email,	8 hrs	8 hrs	S 3/12/16	S 3/12/16	100%
9	1.8	Create donor/sponsor display	4 hrs	4 hrs	M 3/14/16	T 3/15/16	100%
10	1.9	Complete Silent Auction	0 days	0 days	T 3/15/16	T 3/15/16	100%
11	2	<b>Marketing</b>	<b>26.5 days</b>	<b>26.5 days</b>	M 2/15/16	T 3/22/16	100%
12	2.1	Create event Facebook page	4 hrs	4 hrs	T 3/1/16	W 3/2/16	100%
13	2.2	Schedule AIJ exec radio/TV	1 hr	1 hr	T 3/1/16	F 3/11/16	100%
14	2.3	Generate PSA talking points	4 hrs	4 hrs	T 3/1/16	T 3/10/16	100%
15	2.4	Create event invitations and VIP	4 hrs	4 hrs	M 2/15/16	T 3/1/16	100%
16	2.5	AIJ approve VIP list	0 hrs	0 hrs	T 3/1/16	T 3/1/16	100%
17	2.6	Print/mail VIP invitations	4 hrs	4 hrs	M 3/21/16	M 3/21/16	100%
18	2.7	Disseminate event marketing	4 hrs	4 hrs	T 3/22/16	T 3/22/16	100%
19	2.8	Complete marketing	0 days	0 days	M 3/21/16	M 3/21/16	100%
20	3	<b>Venue Planning</b>	<b>58.48 days</b>	<b>58.48 days</b>	F 1/22/16	W 4/13/16	99%
21	3.1	Identify potential donor venue	4.5 hrs	4.5 hrs	F 1/22/16	M 1/25/16	100%
22	3.2	Reserve venue	1 hr	1 hr	T 1/26/16	T 1/26/16	100%
23	3.3	Risk Response: find free venue-	8 hrs	0 hrs	T 2/25/16	F 2/26/16	
24	3.4	Research venue capacity,	2 hrs	2 hrs	T 2/2/16	T 2/2/16	100%
25	3.5	Research venue source for	2 hrs	2 hrs	T 2/2/16	T 2/2/16	100%
26	3.6	Identify potential food/drink	4 hrs	0 hrs	T 2/25/16	T 2/25/16	
27	3.7	Secure food/drink donor	4 hrs	0 hrs	F 2/26/16	F 2/26/16	
28	3.8	Secure microphone/speaker for	2 hrs	0 hrs	T 2/25/16	T 2/25/16	
29	3.9	Request AIJ volunteers for event	2 hrs	2 hrs	T 1/26/16	T 1/26/16	100%
30	3.10	Secure AIJ volunteers for event	2.3 hrs	2.3 hrs	W 1/27/16	W 1/27/16	100%
31	3.11	Risk Response: lack of	4 hrs	0 hrs	T 2/25/16	T 2/25/16	
32	3.12	Schedule/hold initial planning	2 hrs	2 hrs	W 1/27/16	T 1/28/16	100%
33	3.13	Hold final planning committee	2 hrs	2 hrs	W 4/13/16	W 4/13/16	100%



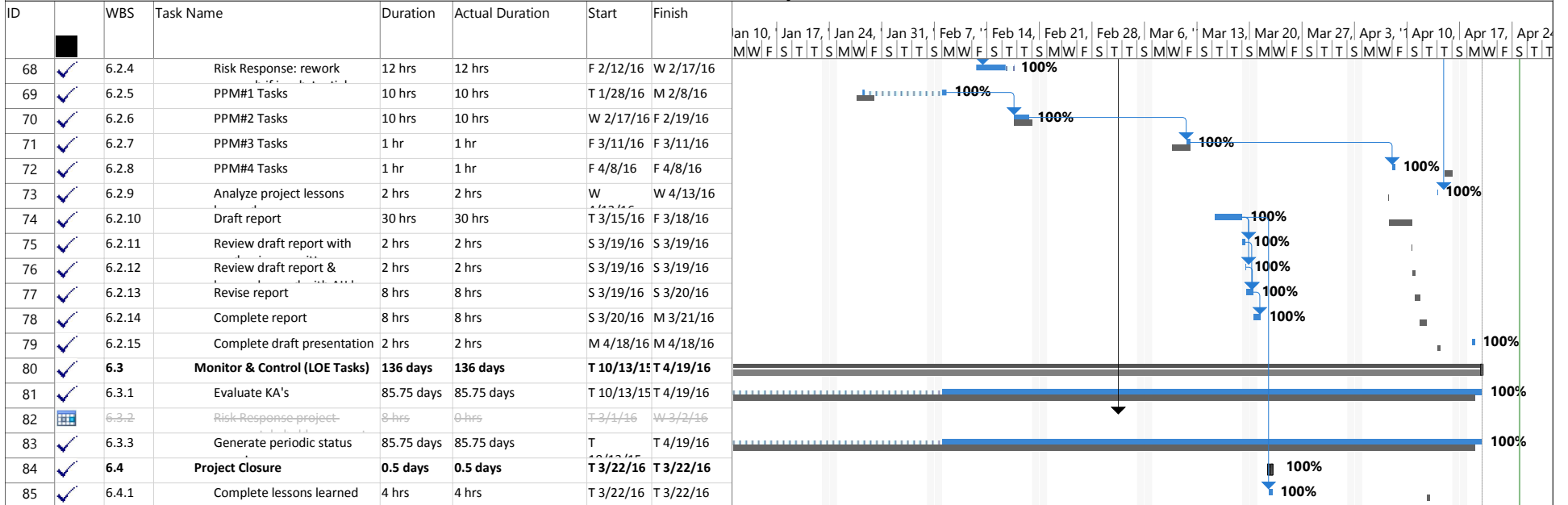
Critical		Manual Task		Baseline Milestone		External Tasks	
Critical Split		Start-only		Milestone		External Milestone	
Critical Progress		Finish-only		Summary Progress		Inactive Task	
Task		Duration-only		Summary		Inactive Milestone	
Split		Baseline		Manual Summary		Inactive Summary	
Task Progress		Baseline Split		Project Summary		Deadline	

Forner - AIJ Project (042416)

ID	WBS	Task Name	Duration	Actual Duration	Start	Finish	
34	3.14	Complete venue planning	0 days	0 days	W 4/6/16	W 4/6/16	
35	4	<b>Speaker Venue Participation</b>	<b>28.01 days</b>	<b>28.01 days</b>	<b>T 3/1/16</b>	<b>S 4/9/16</b>	100%
36	4.1	Research local immigrant	4 hrs	4 hrs	T 3/1/16	M 3/14/16	100%
37	4.2	Solicit speakers for event	8 hrs	8 hrs	M 3/14/16	F 4/8/16	100%
38	4.3	Coordinate and conduct event	3 hrs	3 hrs	F 4/8/16	S 4/9/16	100%
39	4.4	Complete speaker venue	0 days	0 days	S 4/9/16	S 4/9/16	100%
40	5	<b>Produce Continuity Documents for ...</b>	<b>51 days</b>	<b>51 days</b>	<b>T 1/12/16</b>	<b>W 3/23/16</b>	100%
41	5.1	Initiate event checklist/binder	8 hrs	8 hrs	T 1/12/16	W 1/13/16	100%
42	5.2	Revise event checklist/binder for	8 hrs	8 hrs	M 2/15/16	T 2/16/16	100%
43	5.3	Complete event checklist/binder	4 hrs	4 hrs	W	W 3/23/16	100%
44	6	<b>Project Management</b>	<b>136 days</b>	<b>136 days</b>	<b>T</b>	<b>T 4/19/16</b>	100%
45	6.1	<b>PM686A Tasks</b>	<b>30.5 days</b>	<b>30.5 days</b>	<b>T</b>	<b>T 11/24/15</b>	
46	6.1.1	Develop Risk Mgt and PERT	6 hrs	6 hrs	T	W 10/14/15	
47	6.1.2	PMP subplans revisions #1	4 hrs	4 hrs	W	W 10/14/15	
48	6.1.3	PMP Subplans revisions #2	4 hrs	4 hrs	T	T 10/15/15	
49	6.1.4	Abstract revisions	1 hr	1 hr	F 10/16/15	F 10/16/15	
50	6.1.5	Schedule revisions (CP) and	1 hr	1 hr	F	F 10/16/15	
51	6.1.6	Research methods and	2 hrs	2 hrs	F	F 10/16/15	
52	6.1.7	Update KA Data	4 hrs	4 hrs	F 10/23/15	F 10/23/15	
53	6.1.8	Final PPM#3 revisions/post	4 hrs	4 hrs	F	F 10/23/15	
54	6.1.9	Send research methods to	15 mins	15 mins	F	F 10/23/15	
55	6.1.10	PMP subplans revisions #3	24 hrs	24 hrs	M	M 11/2/15	
56	6.1.11	Update KA Data	8 hrs	8 hrs	M 11/9/15	T 11/10/15	
57	6.1.12	Presentation Prep	8 hrs	8 hrs	M	T 11/17/15	
58	6.1.13	Identify KA's for 686B	4 hrs	4 hrs	W	W 11/18/15	
59	6.1.14	Schedule refining	6 hrs	6 hrs	W	F 11/20/15	
60	6.1.15	Research revisions from	4 hrs	4 hrs	F 11/6/15	F 11/6/15	
61	6.1.16	Final PMP, presentation,	30 hrs	30 hrs	M 11/9/15	F 11/20/15	
62	6.1.17	PPM#4 post to BB	30 mins	30 mins	F 11/20/15	F 11/20/15	
63	6.1.18	Presentation Rehearsal	8 hrs	8 hrs	F 11/20/15	T 11/24/15	
64	6.2	<b>PM686B Tasks</b>	<b>69.75 days</b>	<b>69.75 days</b>	<b>T 1/12/16</b>	<b>M 4/18/16</b>	100%
65	6.2.1	Schedule interviews with AU	1 hr	1 hr	T 1/12/16	T 1/12/16	100%
66	6.2.2	Interview/survey stakeholder	4 hrs	4 hrs	T 1/12/16	T 1/12/16	100%
67	6.2.3	Analyze scholarly literature	18 hrs	18 hrs	T 2/9/16	F 2/12/16	100%

Critical		Manual Task		Baseline Milestone		External Tasks	
Critical Split		Start-only		Milestone		External Milestone	
Critical Progress		Finish-only		Summary Progress		Inactive Task	
Task		Duration-only		Summary		Inactive Milestone	
Split		Baseline		Manual Summary		Inactive Summary	
Task Progress		Baseline Split		Project Summary		Deadline	

Forner - AIJ Project (042416)



Critical		Manual Task		Baseline Milestone		External Tasks	
Critical Split		Start-only		Milestone		External Milestone	
Critical Progress		Finish-only		Summary Progress		Inactive Task	
Task		Duration-only		Summary		Inactive Milestone	
Split		Baseline		Manual Summary		Inactive Summary	
Task Progress		Baseline Split		Project Summary		Deadline	

# PROJECT CHARTER

## General Information

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Project Name: AIJ Fundraising & Non-Profit Analysis Project

Project Manager: Carolyn Forner

Project Sponsor: Anastacia Smelova, AIJ Board President

Executive Sponsor: Robin Bronen, AIJ Executive Director

Revision History:

Date	Author	Description of change
9/11/15	C. Forner	Original
10/6/15	C. Forner	Update per advisor input
11/18/15	C. Forner	AIJ revisions to Purpose

## Description

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### Situation/Problem/Opportunity

One of the biggest challenges for most non-profit organizations is fundraising. The Alaska Institute for Justice (AIJ), a non-profit based in Anchorage, has been operating for over 10 years, relying primarily on grants and donations. Through the applied research of a fundraising project for AIJ and some additional organizational research, this project will take the opportunity to accomplish the following:

- Provide a repeatable fundraising event for AIJ
- Evaluate how pm skills, processes, and tools can be applied to enhance use of scarce resources and improve organizational efficiency in this non-profit

### Project Purpose and Justification

AIJ, a non-profit based in Anchorage, AK, provides unique legal services to immigrants including naturalization assistance, visas, and family-based immigration petitions. AIJ provides valuable services to community members who are often isolated, low-income, potentially vulnerable to abuse, and with few other avenues to gain legal representation. AIJ also operates a statewide language interpreter center that provides translation services as well as immigrant and refugee expertise to numerous state and federal agencies dedicated to health care, social services, and law enforcement.

In its 10 years of operation, AIJ has relied primarily on grants and donations to meet the needs of its customers. Currently, donation revenues comprise approximately one percent of its annual budget. Grant funding is considered challenging because many of AIJ's customers are recipients of services for which grant funding must be used under very specific conditions. Additionally, grant funding is considered uncertain and volatile enough to inhibit long-term organizational

financial planning. Because of the challenges with grant funding, unrestricted funds, including funds raised through donations, are a valuable way for AIJ to provide financial sustainability and meet all the needs of the organization and its clients. By increasing awareness of the AIJ mission in the community through the publicity actions of this project, AIJ hopes to expand its donor base and increase its annual donor revenue.

## Scope

The scope of this project includes:

- Planning an AIJ fundraising event during the Fall 2015 UAA semester, to include:
  - An event accessible to AIJ clients, employees, and community members
  - A fundraising entry cover charge
  - A venue that includes local artist donated performances
  - A silent auction of donated items
- Executing the planned AIJ fundraising event during the Spring 2016 UAA semester
- Raising awareness and positive publicity for AIJ through event execution
- Identifying project management tools to improve AIJ resource use and efficiency
- Testing the proposed project management tools during project execution
- Providing AIJ with project continuity documents at completion of project
- Providing ESPM with a research report encompassing the value of project management tools in a non-profit, the analysis of tools used during project execution, and how the results are applicable in the broader project management domain

## Objectives

<b>Project Objective</b>	<b>Goal</b>
Execute fundraising event	Generate AIJ funds and positive publicity
Generate continuity documents	Provide AIJ with tools for repeatable event
Analyze PM tools and templates during execution	Identify PM tools useful to AIJ projects
Raise awareness and positive publicity for AIJ	Strengthen community, cultivate donors
Complete research report	Contribute to PM body of knowledge

## High Level Requirements

The project product must meet the following list of requirements in order to achieve success:

- Successfully stage a fundraising event that generates over \$5,000 in donations
- Generate positive publicity and advertising for AIJ during event execution
- Provide well-defined event continuity documents to AIJ

The academic components of the project must meet the following list of requirements:

- A thorough Project Management Plan
- A research paper analyzing applicable project management tools and conclusions from project execution, monitoring, and control
- A presentation of the final project

## Deliverables

- Project Management Plan and final presentation for Capstone Course 686A
- Final research report and presentation for Capstone Course 686B, including analysis of project management control tools implemented during project execution
- Create and distribute event flyer
- Schedule at least three publicity events--radio and/or TV interviews with AIJ employees and/or clients
- Choose event location, reserve venue and venue food and beverages
- Solicit donation of 4-5 local artist performances (music, dance, poetry, etc.)
- Solicit 25-30 donation items for silent auction
- Work with AIJ employees and volunteers to:
  - Hold at least two volunteer planning meetings leading up to event
  - Organize the event set up and tear down
  - Designate event volunteer roles, including emcee and event donation collectors
  - Hold the event
- Provide AIJ with event continuity documents, to include:
  - Fundraising event checklist created during event execution
  - List of donors and event artist contacts
  - Narrative explanation of coordination efforts
  - PMP files
  - Binder of all hard copy files
  - CD with digital version of the files listed

## Critical Success Factors

The AIJ Fundraiser and Non-Profit Analysis Project will be a success if the following are accomplished:

- Execute a fundraiser that nets over \$5,000 for AIJ
- Collect at least 25 silent auction donations from local artists and businesses
- Secure at least three local artist performances for event night
- Execute at least three visible publicity events (ads, flyers, radio/TV) leading up to event
- Secure a low cost or donated venue location
- Event attended by at least 200 people
- At least 85% customer satisfaction of surveyed AIJ employees
- Project is executed on time
- Provide well-defined event continuity documents to AIJ
- Complete a quality research report by end of Spring 2016 semester

## Milestones

The major milestones in this project include:

- Donor event item and performance solicitation complete
- Marketing of event complete
- Event venue planning complete



- Event complete
- Research report complete
- Provide continuity documents and report findings to AIJ

## Assumptions

The following assumptions are made at the start of project planning:

- This project has the full support of UAA MSPM academic committee members
- This project has the full support of AIJ key leaders
- The project will lead to funds raised for AIJ
- Flyer and mailing costs will be covered by AIJ

## Constraints

The project may be constrained by the following:

- Project relies on goodwill donations from local population
- Project timeline must be completed by end of Spring 2016 semester
- Limited availability of AIJ stakeholders to provide survey inputs
- Venue preparation will require additional AIJ volunteers

	SCOPE	TIME	COST
CONSTRAIN			
OPTIMIZE			
ACCEPT			

## Risks/Opportunities

Risks:

- Donation item solicitation may provide low numbers of items for auction; this could extend deadline if more donations are required
- There may be low turnout or participation at event auction; this could reduce overall net amount of funds raised
- Obtaining a free or donated venue location for event may be difficult; if so, need to explore other options such as schools or community centers
- It may be difficult to recruit volunteers; if so, will request assistance from AIJ execs
- Initial research may be academically insubstantial; this may slow down timeline if additional surveys and scholarly work is required

Opportunities:

- Possible improved ideas for marketing, fundraising, venue planning, and research from stakeholders
- AIJ stakeholders may assist in networking with potential donors
- Donors may assist in additional networking with other potential donors

## Stakeholders

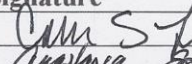
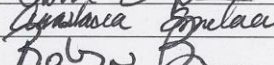
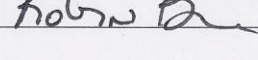
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### Roles and responsibilities

STAKEHOLDER	ROLE	RESPONSIBILITIES IN PROJECT	EXPECTATIONS
Robin Bronen	Executive Sponsor AIJ Executive Director	Executive oversight, project advocate, support research	Maintain AIJ professional image, generate positive publicity, meet fundraising goal, provide PM insight and repeatable results
Anastacia Smelova	Project Sponsor AIJ Board President	Approval of project, project advocate, oversee event, gain volunteer assistance as req'd	Charter and PMP approval, maintain AIJ professional image, PM conducts fairly autonomous work, meet fundraising goal, provide PM insight and repeatable results
Carol Forner	Project Manager	Design, plan, manage project	Clear comm with all stakeholders
Roger Hull	MSPM Academic Advisor	Academic oversight/guidance	Demonstrate PM process & KA learning & mastery, contribute to PM body of knowledge, demonstrate leadership
LuAnn Piccard	MSPSM Committee	Academic oversight/guidance	Demonstrate PM process & KA learning & mastery, contribute to PM body of knowledge, demonstrate leadership
Seong Dae Kim	MSPSM Committee	Academic oversight/guidance	Demonstrate PM process & KA learning & mastery, contribute to PM body of knowledge, demonstrate leadership
AIJ Board Members	Fundraising volunteers	Volunteer support, provide project improvement ideas	Meet fundraising goal
AIJ Clients	AIJ clients	Support event if able	Meet fundraising goal
AIJ Employees	AIJ employees	Volunteer support, event publicity	Meet fundraising goal
Corporate Donors	Business donors	Donate, network connections	Advertise donors at event
Other Business Donors	Business donors	Donate, network connections	Advertise donors at event
Individual Donors	Individual donors	Donate, network connections	Advertise donors, provide tax doc
Event location business	Event location	Donate services	Clear date/time/setup plan
Event attendees	Event attendees	Support event, purchase auction items	Auction provides desirable items from local artists and businesses
MSPM Course Cohorts	Classmates, peers	Academic sounding board	Provide constructive feedback to cohort projects

## Signatures

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	Signature	Date
Project Manager:		11/18/2015
Project Sponsor:		11/18/2015
Executive Sponsor:		11/18/15

**Alaska Institute for Justice**  
431 W. 7<sup>th</sup> Ave, Suite 208  
Anchorage, AK 99501

September 8<sup>th</sup>, 2015

University of Alaska Anchorage  
Project Management Department (MSPM)  
University Center, Room 155  
3901 Old Seward Highway  
Anchorage, AK 99503

Attn: Mr. Roger Hull, Academic Advisor

Re: Sponsorship Letter for MSPM Final Project

Dear Mr. Hull,

The Alaska Institute for Justice supports Carol's efforts in researching and conducting a fundraising project for our organization.

We are a non-profit agency who provides statewide comprehensive legal assistance to immigrants and refugees, with a priority on representing immigrant crime victims and people fleeing persecution and torture in their home countries. We also operate a statewide language interpreter center and we provide immigrant and refugee expertise to numerous state and federal agencies in health care, social services, and law enforcement.

Carol's work will help address one of our key challenges--fundraising. Her project will not only help us generate operating funds in the short term, but will contribute to a standardized process for future fundraising events.

Please do not hesitate to contact me if you have any questions or concerns regarding Carol's final project for her master's in project management.

Sincerely,



Anastacia Smelova  
Board President  
Alaska Institute for Justice