*<Project Name>*

CHANGE MANAGEMENT PLAN

*<mm/dd/yyyy>*

VERSION HISTORY

[Provide information on how the development and distribution of the Communications Management Plan up to the final point of approval was controlled and tracked. Use the table below to provide the version number, the author implementing the version, the date of the version, the name of the person approving the version, the date that particular version was approved, and a brief description of the reason for creating the revised version.]

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| --- | --- | --- | --- | --- | --- |
| **Version #** | **Implemented**  **By** | **Revision**  **Date** | **Approved**  **By** | **Approval**  **Date** | **Reason** |
| 1.0 | *<Author name>* | *<mm/dd/yy>* | *<name>* | *<mm/dd/yy>* | *<reason>* |
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***Note to the Author***

[This document is a template of a Project Change Management Plan document for a project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the project.

* Blue italicized text enclosed in square brackets ([text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.
* Blue italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a particular project.
* Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.

When using this template for your project document, it is recommended that you follow these steps:

1. Replace all text enclosed in angle brackets (i.e., <Project Name>) with the correct field values. These angle brackets appear in both the body of the document and in headers and footers. Modify boilerplate text as appropriate to the specific project.
2. To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.
3. To update the Table of Contents, go to “References” and select the option “Update entire table.”
4. Before submission of the first draft of this document, delete this “Notes to the Author” page and all instructions to the author, which appear throughout the document as blue italicized text enclosed in square brackets.]

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# introduction

## Purpose of Change Management Plan

[Provide the purpose of the change management plan.]

The overall objective of a Project Change Management Plan is to promote the success of a project by managing the changes to a project in order to keep the scope, cost, quality, and schedule of the project under control with full traceability. The *<Project Name>* Project Change Management Plan (CMP) defines the project’s structure and methods to do the following:

* Manage each change request;
* Ensure each request is assessed by key project stakeholders;
* Ensure each assessed request is either accepted, rejected, or deferred by the appropriate authority;
* Enable the orderly implementation of each accepted change; and,
* Enable the impact of all changes to be understood, documented, and managed.

Change management controls any additions, deletions, or modifications to the scope and the project plan. Change from internal or external sources to the scope and project plan need to be accommodated through the life of the project. All requests for changes must be evaluated and approved or disapproved in order to recognize and control scope creep.

The intended audience of the *<Project Name>* CMP is the project manager, project team, project sponsor and any senior leaders whose support is needed to carry out change requests.

# Change Management Process

*Edit this section so it is project-specific. Provide a summary of the sequence of activities to be used to assess change requests. Include in the method the manner by which information will be obtained.*

## Change management steps

*Edit each bullet in this section as it applies to the project.*

The change control process follows these steps:

1. Stakeholder identifies the need for a change and submits a written change request to project manager.
2. Project Manager performs initial assessment of requested change and accepts, rejects, or defers the change for detailed analysis. If impact analysis is required, assign an appropriate Subject Matter Expert (SME) to conduct an analysis.
3. If required, SME conducts impact analysis.
4. Change Board approves, rejects, orders the change request.
5. Project Manager creates a Change Order and assigns to team member(s) for execution.
6. Team member implements the change.
7. Team member and or Project Manager updates the project documentation, including the baseline, as appropriate.
8. Document the Charge Order status.

# Analyzing change requests

*Set standards for the team members to use in analyzing change requests. For example:*

* Determine the effect of the change on schedule and resource requirements;
* Determine impact to existing or required documentation, including post-implementation Run Book;
* Determine the cost of the change;
* Determine impact if the change is not implemented;
* Determine impact to other projects, current or planned; and,
* Determine any additional training requirements if change is implemented.

# Frequency and Lead Times

*Use this section to describe how much time is available to analyze change requests; how often the Change Board should meet; and, how much time is allowed for the Change Board to decide on specific change requests. For example:*

* Project Manager will complete the initial assessment of change requests within two business days.
* Team member(s) assigned to analyze the impact of change request will complete assessment within five business days, or as assigned by Project Manager.
* Change Board meets monthly or as required to handle routine or urgent change requests.

# Change Management Roles

*Edit each bullet in this section as it applies to the project.*

## Steering committee

* Is final authority for deciding which proposed changes are included in the project.
* Directs and recommends strategic changes.

## Change board

* Meets on a periodic basis (for example, biweekly) or as needed to consider the impact of change requests on schedule, resources, budget, technology, and architectures.
* Serves as the focal point for change management.
* Includes the following:
  + Business Owner
  + Project Sponsor
  + IT Director;
  + Other stakeholders at the discretion of the Steering Committee.

The Change Control Board for the [Project Name] includes the following:

|  |  |
| --- | --- |
| **Name** | **Role or Title** |
|  |  |
|  |  |
|  |  |
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## Project Manager

* Receives all change requests and performs initial analysis.
* Documents the status of the change requests.
* Assigns the change requests for analysis to appropriate team members.
* Reviews the potential impact of the requests to the cost and schedule.
* Revivews and revises schedules for change analysis, approval, and implementation.
* Updates project management plans and procedures as affected by the change requests.
* Documents the status of the change requests
* Updates the baseline schedule and budget as required.
* Updates the Change Log.

## Team Lead

* Analyzes the impact of the change, including resource and schedule impact within the agreed time frame.
* Supervises the change implementation by team members.
* Reviews team members’ documentation of implemented change.

## Team members

* Executed approved changes as assigned.
* Updates all associated documentation of completed changes.

# operating procedure for change board

*This section describes the operating procedures established for the Change Board. For example:*

* The Change Board will meet on the second Tuesday of each month or whenever a key change or group of changes requires consideration.
* The Project Manager acts as the facilitator and the focal point for collecting change requests and coordinating the change board meetings.
* The Business Owner and the project manager must be present for the board to make a decision.
* Meetings may take place in-person or by teleconference.
* The Project Manager must provide the Board with a list of change requests for consideration at least 24 hours prior to the meeting.

# simplified procedure for small changes

Minor changes have little impact on the project team and none outside of it. As these changes are usually small, necessary, and self-evident, the project manager can accept them without the formality of the change request procedure outlined above.

|  |  |
| --- | --- |
| **Responsibility** | **Step** |
| Project Manager | Document the request in the Change Log as a small change; attach document as required. |
| Project Manager | Confirm the change as a valid small change. |
| Project Manager | Approve for implementation, defer, or reject.   * Deferred requests will re-ender this step at a later time; * Rejected change requests are stopped at this state and submitter is notified;   Commmunicate the small change to the team for action and information. |
| Team Lead | Monitor the small change implementation |
| Project Manager | Record completion of the small change. |
|  |  |
|  |  |

# approval levels for change requests

*Update this table as appropriate for the project.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Decision** | **Outcome** | **Action** | **Comments** |
| Is this a small change? | Yes | PM approves | Small changes are those that have little impact on the project team and none outside it. |
| No | Continue with approval process |  |
| Is there a change to the project scope, schedule, or budget? | Yes | Change Board approves. | Define Change Board in Project Charter or in Change Management Procedure for project. |
| No | Confirm this is a change request as opposed to a defect or issue |  |
| Is this a strategic change; i.e., a significant change to scope or approach due to new business requirements or new governing regulations? | Yes | If Change Board approves, refers to Steering Committee for approval. | If the project does not have a Steering Committee, the change Board would approve. |
| No | Steering Committee approval not required. |  |
| Is the budget impact less than 10% of the approved budget? | Yes | Change Board approves. | An individual change request may be approved if the overall change is less than 10%; however, the PM is responsible for keeping the project *as a whole* +/ -10%. |
| Is the budget change less than 10% of the approved budget and resource allocations are being changed? | Yes | Change Board and Business Owner approves. |  |
| Is the budget change greater than 10% of the approved budget and additional funding is required? | Yes | Steering Committee approves. |  |
| Does the change request expand the scope of the project? | Yes | Steering Committee approves. | Steering Committee notifies Agency Commissioner and Accounting. |
| No | Change Board approves. |  |
|  |  |  |  |

# Project Change Management Plan approval

The undersigned acknowledge they have reviewed the *<Project Name>* Communications Management Plan and agree with the approach it presents. Changes to this Communications Management Plan will be coordinated with and approved by the undersigned or their designated representatives.

[List the individuals whose signatures are required. Examples of such individuals are Business Owner, Project Manager or Project Sponsor. Add additional lines for signature as necessary. Although signatures are desired, they are not always required to move forward with the practices outlined within this document.]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Title** | **Role** | **Date** | **Signature** |
|  |  |  |  |  |
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APPENDIX A: REFERENCES

[Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.]

The following table summarizes the documents referenced in this document.

|  |  |  |
| --- | --- | --- |
| **Document Name and Version** | **Description** | **Location** |
| *<Document Name and Version Number>* | *[Provide description of the document]* | *<URL or Network path where document is located>* |

APPENDIX B: KEY TERMS

*[Insert terms and definitions used in this document. Add rows to the table as necessary. Follow the link below to for definitions of project management terms and acronyms used in this and other documents.*

[*http://intranet.cdc.gov/library/*](http://intranet.cdc.gov/library/)*]*

The following table provides definitions for terms relevant to this document.

|  |  |
| --- | --- |
| **Term** | **Definition** |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |