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| **Project Change Management Plan** |

**Document Information**

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| --- | --- | --- | --- |
| **Sponsor** |  | **Business Owner** |  |
| **Project Manager** |  | **Estimated Budget** |  |
| **Target Start Date** |  | **Target End Date** |  |

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**Document Approvals**

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| --- | --- | --- | --- |
| **Role** | **Name** | **Signature** | **Date** |
| Project Sponsor |  |  |  |
| Committee Member |  |  |  |
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| Project Manager |  |  |  |

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Template Guide

*[Delete this section after completing the remainder of this document.]*

**What is a project change management plan?**

The Project Change Management Plan documents the process for requesting, logging, evaluating, and approving (or denying) scope/schedule/budget changes requested during a project. Changes during a project are likely. By implementing a disciplined, systematic change management process, changes can be effectively managed. The impacts can be fully understood, and informed decisions can be made without endangering the project objectives, timelines or customer expectations.

**Why create a project change management plan?**

A project change management plan establishes and communicates the process to manage the change that is likely to occur during a project by assessing its impact on budget, schedule, scope, resources and stakeholders.

**How to use this template**

This template provides a guide for project managers to develop a project change management plan for technology and/or business system projects. Additional sections may be added or removed according to the specific business circumstance and need. Sample tables and charts have been included to provide tips on how to complete each section.

*Italicized instructions are included throughout this template to explain the purpose of and how to complete each section of the plan.* ***These should be deleted from the final document.***

# Purpose

*[This section summarizes the purpose of the document.]*

The Project Change Management Plan documents the process for requesting, logging, assessing, and approving (or denying) various types of changes requested during an active project. A change management plan helps manage the project change process, and ensures the effective control of budget, schedule, scope, communication, and resources. The change management plan will minimize the impact a change can have on the business, employees, customers, and other important stakeholders.

# Change Management Process

*[Describe the change management process from beginning to end.]*

The Change Control Process outlines the methods of identifying, planning and implementing changes to the project.

| **Responsible** | **Process Step** | **Description** |
| --- | --- | --- |
| **Requestor** | 1. Identify the need for a change.
 | Submit a complete change request form to the project manager. |
| **Project Manager** | 1. Log change in the change request log.
 | Maintain a log of all submitted change requests throughout the project’s lifecycle. |
| **Project Manager, Team, Requestor** | 1. Evaluate the change.
 | Conduct a preliminary analysis of the potential impact of each change to risk, scope, schedule and cost and seek clarification as needed from team members and the change requestor. |
| **Project Manager** | 1. Submit change request to Change Control Board (CCB).
 | Submit the change request and preliminary analysis to the CCB for review. |
| **Change Control Board (CCB)** | 1. Make final decision to approve or deny change request.
 | Discuss the proposed change and decide whether it will be approved based on all submitted information. |
| **Project Manager** | 1. Communicate the decision.
 | Communicate decision to requestor, team members and stakeholders. |
| **Project Manager** | 1. Implement the change.
 | If a change is approved by the CCB, update and re-baseline project documentation as necessary. |

# Change Control Board

*[Describe the Change Control Board, the purpose of the board, and the members and their respective roles on the board. The CCB is the approval authority for all proposed project changes. If a change is not approved by the CCB then it will not be implemented or adopted within the project. The size and function of each CCB may vary depending on the organization, but their purpose and the roles and responsibilities are consistent.]*

The Change Control Board (CCB) is the approval authority for all proposed change requests pertaining to the project. The purpose of the CCB is to decide whether to approve, deny or defer change requests based on their impact to project risk, schedule, scope, and/or cost. The following chart provides a list of the CCB members for the project:

| **Name** | **Project Role** | **CCB Role** |
| --- | --- | --- |
|  | Project Sponsor | CCB Chair |
|  | Project Manager | CCB Member |
|  | Project Technical Lead | CCB Co-Chair |
|  | Project Operations Lead | CCB Member |

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

# Roles and Responsibilities

*[Describe the roles and responsibilities of the project team members regarding the change control process.]*

The following are the roles and responsibilities for all change management efforts related to the project.

## Project sponsor

* Approve all changes to budget/funding allocations.
* Approve all changes to schedule baseline.
* Approve any changes in project scope.
* Chair the CCB.

## Project manager

* Receive and log all change requests from project stakeholders.
* Conduct preliminary risk, cost, schedule, scope analysis of change prior to CCB.
* Seek clarification from change requestors on any open issues or concerns.
* Ensure all documentation revisions/edits are completed as necessary for all approved changes.
* Facilitate the CCB meetings.

## Project team/stakeholders

* Submit all change requests on change request forms.
* Provide all applicable information and detail on change request forms.
* Be prepared to address questions regarding any submitted change requests.
* Provide feedback as necessary on impact of proposed changes.