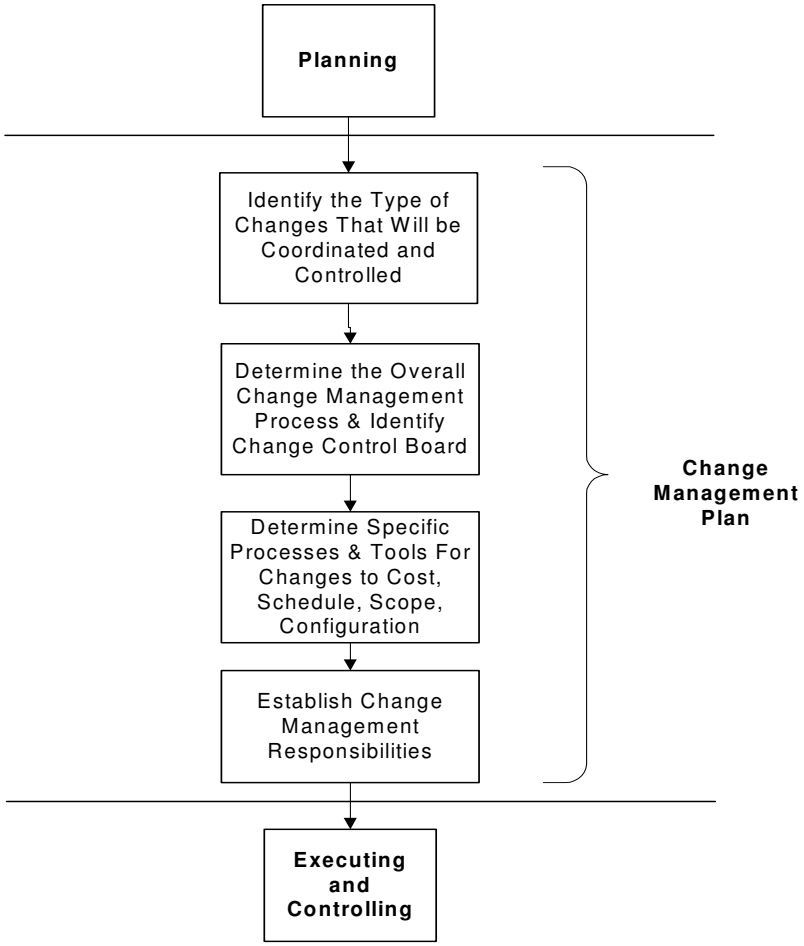
<Project Name> Project Change Management Plan

From: *<unit, team, group, etc>*
To: *<ITGC?, Exec Staff?, DHS Cabinet?>*
File Name: *<file name>*
Date First Created: *<mm/dd/yyyy>*
Date Last Updated: *<mm/dd/yyyy this date is very important because there may be multiple versions as new data is analyzed>*



Purpose of the Document

The purpose of the Change Management Plan is to define and agree on how changes are to be coordinated within the project and organization. The plan addresses how the <Project Name> project will ensure that the changes are beneficial, determine how the change will occur, and manage the changes as they occur.

Document Change Activity

The following is a record of the changes that have occurred on this document from the time of its original approval

#	Change Description	Author	Date

Template Instructions

The template instructions are brief and rely on the user to use the Project Management Guide and current examples available on both the PMO web site, http://www.dtpatwork.nl/pmo.

This template contains suggested boilerplate language and assumes that the project will make appropriate additions, deletions and changes for their specific needs.

Insert information between left and right brackets - <>
Delete brackets.

Additional template instructions in the document are noted in italics.
Delete all italicized instructions.

Under "File" on the menu bar go to Properties; in the Summary Folder enter the document title and author (person or group).

Delete all template instruction in italics.

If the document is longer than five pages, you should insert a table of contents.

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1 CHANGE MANAGEMENT PLAN PURPOSE

The purpose of the <PROJECT NAME> Change Management Plan is to coordinate changes across the entire project. The plan will address how the <Project Name> project will ensure that the changes are beneficial, determine how the change will occur, and manage the changes as they occur.

It is assumed that a request for change may occur in may forms – oral or written, direct or indirect, externally or internally initiated, and legally mandated or optional.

2 CHANGE MANAGEMENT GOALS

The goals of <PROJECT NAME> Change Management Plan:

1. Reasonable change activities are planned.
2. Changes are identified, defined, evaluated, approved and tracked through completion.
3. Project plans are changed to reflect the requested changes.
4. Changes are negotiated and communicated to all affected parties.

3 CHANGE MANAGEMENT RESPONSIBILITIES

The change management responsibilities are:

1. The <PROJECT NAME> project is responsible to develop the Change Management Plan.
2. Adequate resources and funding are obtained to ensure the change management plan can and will be executed.
3. The <PROJECT NAME> is responsible for ensuring that changes are delivered as planned.
4. Records of changes are tracked and maintained.
5. The change management activities will be reviewed with senior management on a periodic basis.

4 OVERALL CHANGE MANAGEMENT MODEL

Note to template user- the following is an overall change management process to manage and coordinate changes across the various aspects of the project. Lower complexity project may use just

the overall change management plan and have no need for the more rigorous processes. Templates are provided for managing overall change control on a project. Higher risk projects require more rigorous change management that addresses not only the overall coordinating change management process, but the specific change process in the areas of scope, schedule, cost, and technical configuration. These subsidiary processes describe how scope/requirements, cost, schedule and technical configurations are developed and managed throughout the life of the project. This template has included sections that reference more rigorous subsidiary change management processes.

The <enter project manager or project office coordinator or other appropriate title> will be assigned and have full responsibility for facilitating or executing the change management process to officially provide new requirements, scope, schedule and resources as follows:

- Identify a change -document and log a change request.
- Evaluate a change - analyze changes to the project plan, work products or activities, and changes to project time and effort estimates.
- Assess for risk - assess impact or risk of change to the project, system, or business.
- Obtain change decision - propose or recommend the change solution, obtain approval, rejection, or rework and negotiate agreements on schedule and effort commitments of all affected parties.
- Integrate changes into project plan - update or re-baseline the project plan(s), estimates, and schedule. Communicate the final changes to commitments or assignments to all affected parties, and obtain approval of the updated project plan and schedule.
- Track to completion – track the change from identification through update project plan and schedule.

5 SCOPE CHANGE/REQUIREMENTS MANAGEMENT

The Requirement Management Plan will be used to define and manage the product scope of the project in support of and consistent with the project objectives throughout the life of the project. It details the process, assigns responsibilities and identifies the techniques to be used, associated tools, and documentation needs.
In summary the plan for Requirements Management is to:

(1) Identify stakeholders and gather, validate, prioritize, and document stakeholder needs and constraints,
(2) Transform needs into high-level requirements, evaluate and correct deficiencies, validate findings with stakeholders, and prepare a matrix for tracing requirements,
(3) Assign and categorize the high-level requirements to products, refine the high-level requirements to obtain greater precision and detail, and validate that the detailed requirements align with the high-level requirements,
(4) Verify through each phase of the project that the end product or deliverable meets the requirements specifications, i.e. the code meets the design specification,
(5) Use the project's change management process to manage deletions, modifications and additions to stay in line with the original objectives or to formally modify these objectives, and the supporting schedule and resourcing.

The Requirements Management Plan is a subsidiary plan of the change management plan and is located in the project planning/change management section of the project file or notebook.

6 SCHEDULE CHANGE MANAGEMENT

Describe how and when schedule changes and schedule baselines will be changed and under what conditions or agreements.

7 COST CHANGE MANAGEMENT

Describe how the budget will be developed how cost change and cost baselines will be changed and under what conditions or agreements. If the projects Cost Management Procedures are detailed a general description should be provided here with a reference to the cost management plan and processes.

8 TECHNICAL CONFIGURATION MANAGEMENT

Describe how the technical configurations of the project will be developed, organized, and managed. On more rigorous projects a configuration management tool will be referenced, but the project team needs to know how the tool will be utilized and managed. What roles and responsibilities they will have and what will be standardized. A reference should be made here to the detailed use of the tool should be described in the tools reference manuals.

The following is a change request form and change management tracking log template.

The following pages contain pictures of suggested templates. Some projects modify the actual templates to represent a more or less rigorous process.
Others may prefer to collect and monitor the change information via spreadsheets or other automated tools. Both the change request form and change log are available separately on the PMO Website "Templates" page under "Controlling Templates". They are included in the plan to give its' readers a view of the forms associated with the process.

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CHANGE REQUEST FORM

CHANGE IDENTIFICATION

Short Title			
Change Control # Request Date		Affected Systems Requested By	
Type of Request	☐ User Request ☐ Technical Request ☐ Standards Request ☐ Other	Supporting Materials Attached	☐Yes ☐No
Request Description Reason for Change			

CHANGE EVALUATION

Effort Estimates (in hours) to change:		Project Timeline Impact	
Project Plans		Task Timeline(s)	☐Yes ☐No
Requirements		Milestones Timeline(s)	☐Yes ☐No
Design		Current Release Timeline	☐Yes ☐No
Test		Future Release Timeline	☐Yes ☐No
Implementation		Other Timeline(s)	☐Yes ☐No
Risk Evaluation			
Recommendation			

DECISION/APPROVAL

Decision Date		Decision	☐ Deny/Cancel ☐ Postpone – Until: ☐ Approve
Decision By	☐ Project Manager ☐ Chg Cntl Board ☐ Steering Committee		
Decision Comments			

CHANGE TRACKING

Project Plan	☐ N/A	By:	Date:	Comment
Requirements	☐ N/A	By:	Date:	Comment
Design				
Test Cases	☐ N/A	By:	Date:	Comment
User Training	☐ N/A	By:	Date:	Comment
Online Help	☐ N/A	By:	Date:	Comment
User Procedure	☐ N/A	By:	Date:	Comment
Construction	☐ N/A	By:	Date:	Comment
Change Document		By:	Date:	Comment

CHANGE MANAGEMENT TRACKING LOG <PROJECT NAME>							
No	Issue Date	Requestor	Title of Request	Impact and Deliverables affected	Resp. Person	Compl Date	Recommendation or Status
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
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