State of Vermont

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Project Name

Change Management Plan

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Prepared By: <Author’s Name>

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# Revision History

This section provides information on how the development and distribution of the Change Management Plan, up to the final point of approval, was controlled and tracked. Use the table below to provide the version number, the date of the version, the author(s) of the version, and a brief description or notes regarding the version. (Remove this comment section from final document.)

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Author(s) | Revision Notes |
| <*insert version>* | *<insert date>* | *<insert name>* | *<insert revision notes>* |
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Notes to the Author

This is Change Management Plan template 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 boxes provide 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.

# INTRODUCTION

## Purpose of the Change Management Plan

A brief introductory statement defining the purpose of the plan (Remove this comment section from final document.)

The Change Management Plan documents how changes will be proposed, accepted, monitored, and controlled from project inception to delivery.

For more information on the State of Vermont Change Order Process, see the latest version of Bulletin No. 3.5.

# CHANGE MANAGEMENT PROCESS

The Change Management process establishes an orderly and effective procedure for tracking the submission, coordination, review, evaluation, categorization, and approval for release of all changes to the project’s baselines.

## Change Request Process Flow Requirements

This section outlines the project team’s agreed upon change request process flow. (Remove this comment section from final document.)

|  |  |
| --- | --- |
| Step | Description |
| Generate Change Request | A submitter completes a Change Request Form and sends the completed form to the Project Manager |
| Log Change Request Status | The Project Manager enters the Change Request into the Change Request Log. The Change Request’s status is updated throughout the process as needed. |
| Evaluate Change Request | Project personnel review the Change Request, and provide an estimated level of effort to process, and develop a proposed solution for the suggested change. |
| Determine Impact | The Change Request is analyzed and assessed for impact to the project’s baseline scope (additions or deletions), schedule (impact on milestones), and total project costs. |
| Approve/Authorize | Approval to move forward with incorporating the suggested change into the project. Every documented change request needs to be either approved or rejected by the Project Sponsor and Project Manager.  |
| Reject | If rejected, the Project Manager will update the Change Request Log. |
| Implement | If approved, make the necessary adjustments to carry out the requested change and communicate Change Request status to the requester and other stakeholders. |

Generate

Change

Request

Report Status

Log Updated Status

Implement

Change

Request

Approve/Authorize

Change

Request

Evaluate

Change

Request

Determine Impact

## Documentation Requirements

This section contains a brief description of the required documentation and expectations relating to any proposed change. It is suggested that, at a minimum, a change request log identifying the change, the area of impact and the documented impact to other project attributes be maintained. At a minimum, the following data should be included on the project’s Change Request Form and Change Request Log. (Remove this comment section from final document.)

A Change Request Log should include the following data:

|  |  |
| --- | --- |
| Element | Description |
| Date | The date the Change Request was created |
| Change Request # | Sequential change request number |
| Contract # | Original contract number |
| Title | A brief description of the change request |
| Description | Description of the desired change, the impact, or benefits of a change should also be described |
| Requestor | Name of the person completing the Change Request Form and who can answer questions regarding the suggested change |
| Phone | Phone number of the individual submitting the request |
| E-Mail | Email of the requestor |
| Project Title | The project that the suggested change is for |
| Project Number | The project number (if applicable) that the suggested change is for |
| Project Manager | Name of the project manager who is responsible for the project |
| Phone | Phone number of the project manager |
| Priority | A code that provides a recommended categorization of the urgency of the requested change (High, Medium, Low) |
| Change type | A change type to assist with evaluating the impact of the change to the project |
| Status type | A status type will assist with documenting the status of the change requests. |

## Evaluating and Authorizing Change Requests

This section includes three tables to be used for evaluating change requests. The first and second tables list and define the priority and type data elements that are applicable for the project. The third table provides examples of commonly used project status types. The list of elements is at the discretion of the project manager. (Remove this comment section from final document.)

Change requests are evaluated using the following priority criteria:

|  |  |
| --- | --- |
| Priority | Description |
| High | *<Insert the definition the project assigns to a high priority Change Request>* |
| Medium | *<Insert the definition the project assigns to a medium priority Change Request>* |
| Low | *<Insert the definition the project assigns to a low priority Change Request>* |

Change requests are evaluated and assigned one or more of the following change types:

| Type | Description |
| --- | --- |
| Scope | <*Insert the description of the change affecting scope>* |
| Time | <*Insert the description of the change affecting time>* |
| Duration | <*Insert the description of the change affecting duration>* |
| Cost | <*Insert the description of the change affecting cost>* |
| Resources | <*Insert the description of the change affecting resources>* |
| Deliverables | <*Insert the description of the change affecting the deliverables>* |
| Product | <*Insert the description of the change affecting the product>* |
| Processes | <*Insert the description of the change affecting the processes>* |
| Quality | <*Insert the description of the change affecting quality>* |
| *<change type>* | *<define this change type>* |

Change requests are evaluated and assigned one of the following status types:

|  |  |
| --- | --- |
| Status | Description |
| Open | Entered/Open but not yet approved or assigned |
| Work in Progress | Change Request approved, assigned, and work is progressing |
| In Review | Change Request work is completed and in final review prior to testing |
| Testing | Change Request work has been reviewed and is being tested |
| Closed | Change Request work is complete, has passed all tests, and updates have been released. |
| *<status type>* | *<define this status type CR>* |

### Change Request Approvers

This section describes the group of individuals assigned to review and approve/reject project changes. This group is often referred to as the Change Control Board. It includes project stakeholders or their representatives; in many projects, the Steering Committee functions as the Change Request Approvers. (Remove this comment section from final document.)

The following table lists the Change Request approvers and provides a brief description of their role/level of authority within the group:

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name | Contact | Description |
| *<Insert Role>* | *<Insert Name>* | *<Insert Contact #>* | *<Insert Role Description>* |
|  |  |  |  |

# Responsibilities

This section describes who will be responsible for each step of the change management process for the project. (Remove this comment section from final document.)

The following table lists who will be responsible for each step of the change management process for the project:

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name | Contact | Description |
| *Project Manager* | *<Insert Name>* | *<Insert Contact #>* | *<Insert Role Description>* |
| *<Insert Role>* | *<Insert Name>* | *<Insert Contact #>* | *<Insert Role Description>* |

# Change Communications Process

This section defines the communication process that will be implemented with a reference to the Communications Management Plan. Approved changes must be communicated to all project team members and key stakeholders. Some changes will need to be communicated to the customer. (Remove this comment section from final document.)

Change Requests that may result in a need for communication to the project team members and/or key stakeholders include:

* Changes to cost estimates, activity sequences, schedule dates, resource requirements, and analysis or risk response alternatives;
* Revisions to the project management plan and documents;
* Corrective actions that may bring the expected future performance of the project back in line with the project management plan; and
* Preventive actions that may reduce the probability of incurring future negative project performance.

# Key Terms

This section defines acronyms and terms relevant to this document. (Remove this comment section from final document.)

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

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

# Approvals

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name and Title | Signature | Date |
|  *Project Sponsor* | *<Insert Name and Title>* | *<Placeholder for Signature>* | *<Insert Date>* |
| *<Insert Role>* | *<Insert Name and Title>* | *<Placeholder for Signature>* | *<Insert Date>* |
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