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| Conestoga College – ProjEct Freelancer |
| Change Management Plan |
| INFO3020 – Project Design |
|  |
| **James Raithby, Mathew Cain, & Verdi R-D** |
| **10/21/2014** |

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Version History

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| --- | --- | --- | --- | --- | --- |
| **Version #** | **Implemented**  **By** | **Revision**  **Date** | **Approved**  **By** | **Approval**  **Date** | **Reason** |
| 1.0 | James Raithby | 10/21/14 |  |  | Project Inception |
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# Introduction

## Purpose Of The Change Management Plan

The purpose of the following change management document is to provide a unified method of managing change. This document remains valid throughout the entire lifecycle of our project.

# Change Management Process

## Change Request Process Steps

The following steps will be followed for each change request:

|  |  |
| --- | --- |
| Step | Description |
| Generate CR | A CR Form is created and the completed form is submitted to the project manager. |
| Log CR | The CR is logged into the CR log by the Project Manager. |
| CR Cost Estimate | The project manager updates the CR with an estimate of the cost of the change in terms of time, resources and cost. |
| Escalate CR | The Change Manager will present the CR to the CR Board. |
| Evaluate CR | The CR Board will meet and determine as a body whether or not to approve the requested change. |
| Communicate Decision | The Change Manager will notify the affected parties of the CR Board’s decision. If approved the necessary changes are made to carry out the plan. |

Throughout this process the Change Management Log will be updated.

## **Change Request Form**

The Change Request Form will contain the following pieces of information:

|  |  |  |
| --- | --- | --- |
| Element | Determined By | Description |
| Date | Submitter | The date the CR was created. |
| CR# | Project Lead | A unique identifying number following the template CR#000000 |
| Title | Submitter | A short description of the change request |
| Description | Submitter | A detailed description of the requested change. |
| Result | Submitter | A detailed description of the impact of the change including benefits and drawbacks. |
| Submitter | Submitter | The name of the submitter |
| Priority | Submitter | Valid Options: Critical, High, Medium, Low,  Critical: Project progress will stop unless this CR is addressed  High: This change will significantly set the project back in terms of time and materials. Represents a significant change.  Medium: This change will moderately set the project back. Represents a minor but key change.  Low: This change will not set the project or will set the project back an insignificant amount. Represents a minor change. |
| Expected Resolution | Submitter | The date by which this CR needs to be resolved. |
| Project Lead | Project Lead | The name of the Project Lead. |
| Contact Info | Project Lead | The contact info of the project lead |
| Cost Estimate | Project Lead | The estimated cost of the change in terms of manpower, resources and schedule delays. |
| Recommendation | Project Lead | The Project Leads recommendation on how to proceed. |
| Resolution | Change Manager / Change Management Board | The final decision of the Change Manager or Change Management Board |
| Reasoning | Change Manager / Change Management Board | The reasoning behind the resolution. |

## Change Request Log

|  |  |  |
| --- | --- | --- |
| Element | Determined By | Description |
| CR# | Project Lead | A unique identifying number following the template CR#000000 |
| Status | Project Lead / Change Manager | Valid Options: Open, Work In Progress, Resolved, Overdue  Open: This CR has been opened but no steps have been taken in addressing it.  Work In Progress: This CR is still in the process of being addressed.  Closed: This change has been addressed and appropriate action taken.  Overdue: This CR has not been completed but has exceeded it’s expected resolution date |
| Priority | Project Lead | Valid Options: Critical, High, Medium, Low,  Critical: Project progress will stop unless this CR is addressed  High: This change will significantly set the project back in terms of time and materials. Represents a significant change.  Medium: This change will moderately set the project back. Represents a minor but key change.  Low: This change will not set the project or will set the project back an insignificant amount. Represents a minor change. |
| Description | Project Lead | A description of the requested change. |
| Submitter | Project Lead | The person or persons submitting the CR |
| Expected Resolution | Project Lead | The date by which this CR needs to be resolved. |
| Action(s) | Project Lead | The Actions required to implement this CR |
| Cost Estimate | Project Lead | The estimated cost of the change in terms of manpower, resources and schedule delays. |
| Impact Summary | Project Lead | A brief statement outlining the impact (good or bad) this change will have on the project. |
| Change Type | Project Lead | Valid Entries: Product, Project , Other  Product: A change to the Product concept such as adding features etc.  Project: A change to the project outline such as scheduling etc.  Other: Anything else |
| Resolution Date | Change Manager | The date the CR is resolved |
| Resolution / Reasoning | Change Manager | The final decision and reasoning of the Change Manager or Change Management Board. |

## Change Control Board

|  |  |  |
| --- | --- | --- |
| **Role** | **Name** | **Description** |
| Change Board Member | James Raithby | Participates in change board decisions. |
| Change Board Member | Matt Cain | Participates in change board decisions. |
| Change Board Member | Verdi | Participates in change board decisions. |

# Change Management Plan Approval

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

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |

# Appendix A: Change Request Template

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Submitter | | | | | | | | | | |
| **Request #** | | *CR#xxxxxx* | | | **Date Submitted** | | *[mm/dd/yyyy]* | | | |
| **Title** | | *[Short Title]* | | | **Date Required** | | *[mm/dd/yyyy]* | | | |
| **Description** | | *[A detailed description of the change being requested]* | | | | | | | | |
| **Priority** | | □ Low □ Medium □ High □ Critical | | | | | | | | |
| **Expected Result** | | *[A detailed description of the expected result of the change]* | | | | | | | | |
| **Comments / Assumptions** | | *[Any additional comments or assumptions made]* | | | | | | | | |
| **Approval Signature** | |  | **Printed Name** | | |  | | **Date Signed** | |  |
|  | *[signature 1]\_\_\_\_\_\_* | |  | *[John Doe]* | | | |  | *[mm/dd/yyyy]* | |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Project Manager | | | | | | | | | |
| **Time Impact** | | *[#man hours]* | *[Details on how the change will impact the time needed for the project]* | | | | | | |
| **Cost Impact** | | *[cost]* | *[Detail the impact the change will have on the cost of the project]* | | | | | | |
| **Actions** | | *[The actions which would be required to implement this change]* | | | | | | | |
| **Comments** | | *[Any additional comments]* | | | | | | | |
| **Recommendations** | | *[Recommendations regarding the change request]* | | | | | | | |
| **Approval Signature** | |  | | **Printed Name** | |  | **Date Signed** | |  |
|  | *[signature 1]\_\_\_\_\_\_* | | |  | *[John Doe]* | |  | *[mm/dd/yyyy]* | |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Change Control Board | | | | | | | | |
| **Decision** | | □ Approved □ Rejected □ Need More Info | | | | | | |
| **Decision Date** | | *[mm/dd/yyyy]* | | | | | | |
| **Decision Explanation** | | *[The reasons behind the decision]* | | | | | | |
| **Approval Signatures** | |  | **Printed Name** | |  | **Date Signed** | |  |
|  | *[signature 1]\_\_\_\_\_\_* | |  | *[John Doe]* | |  | *[mm/dd/yyyy]* | |
|  | *[signature 2]\_\_\_\_\_\_* | |  | *[Jane Doe]* | |  | *[mm/dd/yyyy]* | |
|  | *[signature 3]\_\_\_\_\_\_* | |  | *[Bob Smith]* | |  | *[mm/dd/yyyy]* | |

# Appendix B: Change Management Log Template

## Change Management Log

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| CR# | Status | Priority | Submitter | Expected  Resolution | Action(s) | Impact Summary | Change  Type | Resolution  Date | Resolution | Reasoning |
| *[##]* | Open | Critical | *[John Doe]* | *[mm/dd/yyyy]* | *[What actions are required to carry out this change request]* | *[How will this affect the project?]* | Product | [mm/dd/yyyy] | Approved | *[A brief outline of the reason why the board ruled as it did.]* |
|  | In Progress | Low |  |  |  |  | Project |  | Rejected |  |
|  | Resolved | Medium |  |  |  |  | Others |  | More Info |  |
|  | Overdue | High |  |  |  |  |  |  |  |  |

# Appendix C: Key Terms and Acronyms

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

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