**Conestoga** **College** **–** **SET**

**Milestone #2**

**Change Management Plan**

**Jennifer Klimova (6950851)**

**Nathan Nickel (6763692)**

**Wes Thompson (6992143)**

**Alex Martin (6693659)**

**Date** **of** **Submission** **:** **Document** **Revision** **:**

**2016-11-04** **Revision** **A2**

PD   
 (INFO 3020)

**Revision History**

|  |  |  |  |
| --- | --- | --- | --- |
| **Rev** | **Date** | **Description** **of** **Change** | **By** |
| A1 | 2016-11-01 | • Initial release of document | Jennifer Klimova  Nathan Nickel  Wes Thompson  Alex Martin |
| A2 | 2016-11-04 | • Total revision of document | Jennifer Klimova  Nathan Nickel  Wes Thompson  Alex Martin |

Contents

[Introduction 4](#_Toc466057323)

[Purpose of the Change Management Plan 4](#_Toc466057324)

[Change management Process 4](#_Toc466057325)

[Change Request Process Flow Requirements 4](#_Toc466057326)

[Change Request Form and Change Management Log 5](#_Toc466057327)

[Evaluating and Authorizing Change Requests 5](#_Toc466057328)

[Change Control Board 6](#_Toc466057329)

[Responsibilities 6](#_Toc466057330)

# Introduction

## Purpose of the Change Management Plan

The Change Management Plan documents and tacks the necessary information required to effectively manage project change from project inception to delivery.

The Change Management Plan is created during the Planning Phase of the project. Its intended audience is the project manager, project team, project sponsor and any senior leaders whose support is needed to carry out the plan.

# 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

|  |  |
| --- | --- |
| **Step** | **Description** |
| Generate CR | A submitter completes a CR Form and sends the completed form to the Change Manager |
| Log CR Status | The Change Manager enters the CR into the CR Log. The CR’s status is updated throughout the CR process as needed. |
| Evaluate CR | Project personnel review the CR and provide an estimated level of effort to process, and develop a proposed solution for the suggested change |
| Authorize | Approval to move forward with incorporating the suggested change into the project/product |
| Implement | If approved, make the necessary adjustments to carry out the requested change and communicate CR status to the submitter and other stakeholders |



## Change Request Form and Change Management Log

|  |  |
| --- | --- |
| **Element** | **Description** |
| Date | The date the CR was created |
| CR# | Assigned by the Change Manager |
| 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 |
| Submitter | Name of the person completing the CR Form and who can answer questions regarding the suggested change |
| Phone | Phone number of the submitter |
| E-Mail | Email of the submitter |
| Product | The product that the suggested change is for |
| Version | The product version that the suggested change is for |
| Priority | A code that provides a recommended categorization of the urgency of the requested change (High, Medium, Low) |

## Evaluating and Authorizing Change Requests

Change requests are evaluated using the following priority criteria:

|  |  |
| --- | --- |
| **Priority** | **Description** |
| High | A core feature that has the potential to affect other already implemented features |
| Medium | A smaller feature that has functionality, however is not dependent on by other core features |
| Low | Has no functionality ie. Text, instructions, images, etc. |

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

|  |  |
| --- | --- |
| **Type** | **Description** |
| Scope | Change affecting scope |
| Time | Change affecting time |
| Duration | Change affecting duration |
| Cost | Change affecting cost |
| Resources | Change affecting resources |
| Deliverables | Change affecting deliverables |
| Product | Change affecting product |
| Processes | Change affecting process |
| Quality | Change affecting quality |

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 | CR approved, assigned, and work is progressing |
| In Review | CR work is completed and in final review prior to testing |
| Testing | CR work has been reviewed and is being tested |
| Closed | CR work is complete, has passed all tests, and updates have been released. |

### Change Control Board

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Contact** | **Description** |
| Project Manager | Jennifer Klimova | 5197226697 | Jen is the leader in the project and will see the overarching project and all of its changes to make sure that everything stays on scope best we can. |
| Developer | Wes Thompson | 5195312937 | Wes in charge of overseeing the major changes in the project and to make sure that everything is within scope |
| Developer | Alex Martin | 5198079475 | Alex is the main database developer and he is to make sure that the database changes worth while |
| Developer | Nathan Nickel | 5195761999 | Nathan is the main front end developer and he will be the one making the main changes to the front end of our project |

# Responsibilities

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Contact** | **Description** |
| Project manager | Jennifer Klimova | 5197226697 | Jen is the project manager and she will be over seeing the entire project and making sure that everything stays on scope and to assess’ large changes to the scope. |
| Change Manager | Wes Thompson | 5195312937 | Wes will be in charge of managing any change that will happen to the project and try to fix anything that is not working in a change and attempt to get it working correctly |
| Developer | Alex Martin | 5198079475 | Alex is the main database developer and will be the main person working on the back end of the project and any changes and will be consulted on any changes on the back end |
| Developer | Nathan Nickel | 5195761999 | Nathan is the main front end developer and he is the main person working on the front end and he will be consulted on any changes that is pertaining to the front end of the project |

Appendix A: Change Management Plan Approval

The undersigned acknowledge they have reviewed the Lily Systems **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: | 2016 – 11 - 04 |
| Print Name: | Jen |  |  |
| Title: | Team Leader |  |  |
| Role: | Project Manager  Change Manager |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: | 2016 – 11 - 04 |
| Print Name: | Nathan |  |  |
| Title: | Web Developer |  |  |
| Role: | Records Manager |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: | 2016 – 11 - 04 |
| Print Name: | Wes Thompson |  |  |
| Title: | Web Developer /  Database Developer |  |  |
| Role: | Investment Manager |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: | 2016 – 11 - 04 |
| Print Name: | Alex Martin |  |  |
| Title: | Database Developer |  |  |
| Role: | Functional Manager |  |  |

Appendix B: References

The following table summarizes the documents referenced in this document.

|  |  |  |
| --- | --- | --- |
| **Document Name and Version** | **Description** | **Location** |
| Centers for Disease Control and Prevention Glossary | This document contains a glossary of frequently used terms in software development. This document was used to fill in the Appendix C: Key Terms | *http://www2.cdc.gov/cdcup/library/glossary/default.htm* |

Appendix C: Key Terms

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

|  |  |
| --- | --- |
| **Term** | **Definition** |
| **Change Management** | The change management process establishes an orderly and effective practice that tracks the submission, coordination, review, evaluation, categorization, and approval for release of all changes to the baseline configuration. |
| **Change Management Log** | A tool used by project teams to document and track the resolution of change requests. |
| **Change Request (CR)** | A request to expand or reduce the project scope, modify policies, processes, plans, or procedures, modify costs or budgets, or revise schedules. Requests for a change can be direct or indirect, externally or internally initiated, and legally or contractually mandated or optional. Only formally documented requested changes are processed and only approved change requests are implemented. |
| **Change Request Form** | A form that is submitted to request a change. |
| **Contract** | A mutually binding legal relationship obligating the seller to furnish the supplies or services and the buyer to pay for them. It includes all types of commitments that obligate the Government to an expenditure of appropriated funds and that, except as otherwise authorized, are in writing. |
| **Duration** | PMI PMBOK defines duration as the total number of work periods required completing a schedule activity or WBS component, usually expressed as work days or work weeks. |
| **Function** | The capability or behavior of a program, application, or system; the total set of its features, or "the things it can do". |
| **Functional Manager** | Someone with management authority over an organizational unit within a functional organization. The manager of any group that actually makes a product or performs a service. Sometimes called a line manager. |
| **Functional Requirements** | Functional requirements specify Business Product features and what the Business Product must do. They are directly derived from the objectives defined in the Project Management Plan. A functional requirement is a tangible service, or function, that the Business Product must provide and is a non-technical requirement. How the Business Product should behave. See also Non-functional Requirements. |
| **Implementation Plan** | The Implementation Plan describes how the business product will be installed, deployed, and transitioned into the operational environment. |
| **Investment Manager** | The Investment Manager is responsible for planning and executing the investment to achieve approved baselines. The IM may or may not be a subject matter expert in the business area supported by the investment. |
| **Milestone** | A significant point or event in the project. |
| **Product** | An artifact that is produced, is quantifiable, and can be either an end item in itself or a component item. |
| **Program** | A group of related projects managed in a coordinated way to obtain benefits and control not available from managing them individually. Programs may include elements of related work outside of the scope of discrete projects in the program. |
| **Project Manager** | The person responsible for managing the project. |
| **Records Management** | Records Management consists of the planning, controlling, directing, organizing, training, promoting, and other managerial activities involved in records creation, maintenance and use, and disposition in order to achieve adequate and proper documentation of the policies and transactions of the Federal Government and effective and economical management of agency operations (44 U.S.C. 2901). |
| **Resource** | Skilled human resources (specific disciplines either individually or in crews or teams) equipment, services, supplies, commodities, materiel, budgets or funds. |
| **Scope** | The extent of the area or subject matter that something deals with or to which it is relevant |
| **Sponsor** | The person or group that provides/authorizes the resources for the project. |
| **Stakeholder** | A person or organization that is actively involved in the project, and/or that could positively or negatively impact the achievement of the project objectives, and/or whose interests may be positively or negatively affected by the execution or completion of the project. |

Appendix D: Change Request Form Example

The example Change Request From attached below can be used to submit changes during the life of the project.



Appendix E: Change Management Log Template

The detailed Change Management Log template attached below can be used to track and manage requested changes during the life of the project.

