



<PROJECT NAME>
CHANGE MANAGEMENT PLAN

Version <1.0>
<mm/dd/yyyy>

VERSION HISTORY

[Provide 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 author implementing the version, the date of the version, the name of the person approving the version, the date that particular version was approved, and a brief description of the reason for creating the revised version.]

Version #	Implemented By	Revision Date	Approved By	Approval Date	Reason
1.0	<Author name>	<mm/dd/yy>	<name>	<mm/dd/yy>	<reason>

UP Template Version: 11/30/06

Note to the Author

[This document is a template of a Change Management Plan document 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 square brackets ([text]) provides 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.*

When using this template for your project document, it is recommended that you follow these steps:

- 1. Replace all text enclosed in angle brackets (i.e., <Project Name>) with the correct field values. These angle brackets appear in both the body of the document and in headers and footers. To customize fields in Microsoft Word (which display a gray background when selected):*
 - a. Select File>Properties>Summary and fill in the Title field with the Document Name and the Subject field with the Project Name.*
 - b. Select File>Properties>Custom and fill in the Last Modified, Status, and Version fields with the appropriate information for this document.*
 - c. After you click OK to close the dialog box, update the fields throughout the document with these values by selecting Edit>Select All (or Ctrl-A) and pressing F9. Or you can update an individual field by clicking on it and pressing F9. This must be done separately for Headers and Footers.*
- 2. Modify boilerplate text as appropriate to the specific project.*
- 3. To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.*
- 4. To update the Table of Contents, right-click and select "Update field" and choose the option- "Update entire table"*
- 5. Before submission of the first draft of this document, delete this "Notes to the Author" page and all instructions to the author, which appear throughout the document as blue italicized text enclosed in square brackets.]*

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1 INTRODUCTION

1.1 PURPOSE OF THE CHANGE MANAGEMENT PLAN

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

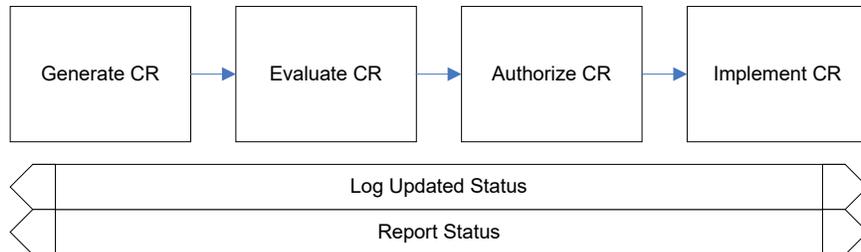
The Change Management Plan is created during the Planning Phase of the project. Its intended audience is the project manager, project team, project sponsor and any senior leaders whose support is needed to carry out the plan.

2 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.

2.1 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



2.2 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)

2.3 EVALUATING AND AUTHORIZING CHANGE REQUESTS

[In order to evaluate and prioritize a change request, the “priority” and “type” of the change are taken into consideration. Use the first and second tables below to 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.]

Change requests are evaluated using the following priority criteria:

Priority	Description
High	Functionality that significantly changes the application/database/environment If it is a network change, it would affect the entire diocesan user base
Medium	
Low	Creation of new reporting or changes to existing reports (not cosmetic)
Cosmetic	Visual changes to existing reports

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 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	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.
<status type>	<define this status type CR>

2.3.1 Change Control Board

[A Change Control Board (CCB) is a formally constituted group of stakeholders responsible for approving or rejecting changes to the project baselines. This group may meet on a predefined schedule or on an as needed basis. The table below provides a brief description of personnel acting as the Change Control Board (CCB) and their role/level of authority within that group.]

Role	Name	Contact	Description
<i>[Insert Role]</i>	<i>[Insert Name]</i>	<i>[Insert Contact #]</i>	<i>[Insert Role Description]</i>

3 RESPONSIBILITIES

[Provide a brief description of persons responsible for each step of the change management process for the project.]

Role	Name	Contact	Description
<i>Project Manager</i>			
<i>Change Manager</i>			
<i>[Insert Role]</i>	<i>[Insert Name]</i>	<i>[Insert Contact #]</i>	<i>[Insert Role Description]</i>

Appendix A: Change Management Plan Approval

The undersigned acknowledge they have reviewed the <Project Name> **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.

[List the individuals whose signatures are desired. Examples of such individuals are Business Steward, Project Manager or Project Sponsor. Add additional lines for signature as necessary. Although signatures are desired, they are not always required to move forward with the practices outlined within this document.]

Signature: _____ Date: _____
Print Name: _____
Title: _____
Role: _____

Signature: _____ Date: _____
Print Name: _____
Title: _____
Role: _____

Signature: _____ Date: _____
Print Name: _____
Title: _____
Role: _____

Appendix B: References

[Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.]

The following table summarizes the documents referenced in this document.

Document Name and Version	Description	Location
<i><Document Name and Version Number></i>	<i>[Provide description of the document]</i>	<i><URL or Network path where document is located></i>

Appendix C: Key Terms

[Insert terms and definitions used in this document. Add rows to the table as necessary. Follow the link below to for definitions of project management terms and acronyms used in this and other documents.

<http://www2.cdc.gov/cdcup/library/other/help.htm>

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

Term	Definition
<i>[Insert Term]</i>	<i>[Provide definition of the term used in this document.]</i>
<i>[Insert Term]</i>	<i>[Provide definition of the term used in this document.]</i>
<i>[Insert Term]</i>	<i>[Provide definition of the term used in this document.]</i>

Appendix D: Change Request Form Example

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



CDC_UP_Change_Re
quest_Form_Example

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.



CDC_UP_Change_Management_Log_Template