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PROJECT CHANGE MANAGEMENT PLAN

Project Name:	
Prepared by:	
Date (MM/DD/YYYY):	

To create links to referenced documents (e.g., [Link_To_...](#)): Insert  **Hyperlink** on your toolbar.
Modify the text of this document to fit your project.

<Modify this template to fit your project.>

1. Purpose

The purpose of this Change Management Plan is to:

- Ensure that all changes to the project are reviewed and approved in advance
- All changes are coordinated across the entire project.
- All stakeholders are notified of approved changes to the project.

All project Change Requests (CR) must be submitted in written form using the Change Request Form provided.

[Link To Project Change Request Form](#)

The project team should keep a log of all Change Requests.

[Link To Project Change Request Log](#)

2. Goals

The goals of this Change Management Plan are to:

- Give due consideration to all requests for change
- Identify define, evaluate, approve, and track changes through to completion
- Modify Project Plans to reflect the impact of the changes requested
- Bring the appropriate parties (depending on the nature of the requested change) into the discussion
- Negotiate changes and communicate them to all affected parties.

3. Responsibilities

Those responsible for Change Management

Their Responsibilities

- Project Manager (with the Project Team)

Developing the Change Management Plan

3. Responsibilities

<i>Those responsible for Change Management</i>	<i>Their Responsibilities</i>
<ul style="list-style-type: none">• Project Manager	Facilitating or executing the change management process. This process may result in changes to the scope, schedule, budget, and/or quality plans. Additional resources may be required.
<ul style="list-style-type: none">• A designated member of the Project Team	Maintaining a log of all CRs
<ul style="list-style-type: none">• Project Manager	Conducting reviews of all change management activities with senior management on a periodic basis
<ul style="list-style-type: none">• The Executive Committee	Ensuring that adequate resources and funding are available to support execution of the <i>Change Management Plan</i> Ensuring that the <i>Change Management Plan</i> is implemented

4. Process

<The Change Management process may be simple or complex. The following text is provided as an example of how requests for change can be handled in your project. Supplement with a graphical flowchart if that will help your stakeholders understand the process. Modify as necessary.>

The Change Management process occurs in six steps:

1. Submit written Change Request (CR)
2. Review CRs and approve or reject for further analysis
3. If approved, perform analysis and develop a recommendation
4. Accept or reject the recommendation
5. If accepted, update project documents and re-plan
6. Notify all stakeholders of the change.

In practice the Change Request process is a bit more complex. The following describes the change control process in detail:

1. **Any stakeholder can request or identify a change. He/she uses a *Change Request Form* to document the nature of the change request.**
2. **The completed form is sent to a designated member of the Project Team who enters the CR into the *Project Change Request Log*.** [Link To Project Change Request Log](#)
3. **CRs are reviewed daily by the Project Manager or designee and assigned one four possible outcomes:**

4. Process

- *Reject:*
 - Notice is sent to the submitter
 - Submitter may appeal (which sends the matter to the Project Team)
 - Project Team reviews the CR at its next meeting.
- *Defer to a date:*
 - Project Team is scheduled to consider the CR on a given date
 - Notice is sent to the submitter
 - Submitter may appeal (which sends the matter to the Project Team)
 - Project Team reviews the CR at their meeting.
- *Accept for analysis immediately (e.g., emergency):*
 - An analyst is assigned and impact analysis begins
 - Project Team is notified.
- *Accept for consideration by the project team:*
 - Project Team reviews the CR at its next meeting.

4. All new pending CRs are reviewed at the Project Team meeting. Possible outcomes:

- *Reject:*
 - Notice is sent to the submitter
 - Submitter may appeal (which sends the matter to the Project Sponsor, and possibly to the Executive Committee)
 - Executive Committee review is final.
- *Defer to a date:*
 - Project Team is scheduled to consider the CR on a given date
 - Notice is sent to the submitter.
- *Accept for analysis:*
 - An analyst is assigned and impact analysis begins
 - Notice is sent to the submitter.

5. Once the analysis is complete, the Project Team reviews the results.¹ Possible outcomes:

- *Reject:*
 - Notice is sent to the submitter
 - Submitter may appeal which sends the matter to the Project Sponsor (and possibly to the Executive Committee)
 - Executive Committee review is final.
- *Accept:*
 - Project Team accepts the analyst's recommendation
 - Notice is sent to Project Sponsor as follows:
 - Low-impact CR – Information only, no action required
 - Medium-impact CR – Sponsor review requested; no other action required
 - High-impact CR – Sponsor approval required.
- *Return for further analysis:*

Project Team has questions or suggestions that are sent back to the analyst for further consideration.

¹ Note: Sponsor participates in this review if the analysis was done at Sponsor's request.

4. Process

6. Accepted CRs are forwarded to the Project Sponsor for review of recommendations. Possible outcomes:

- *Reject:*
 - Notice is sent to the submitter
 - Submitter may appeal to the Executive Committee
 - Executive Committee review is final.
- *Accept:*
 - Notice is sent to the submitter
 - Project Team updates relevant project documents
 - Project Team re-plans
 - Project Team acts on the new plan.
- *Return for further analysis:*
 - The Sponsor has questions or suggestions that are sent back to the analyst for further consideration
 - Notice is sent to the submitter
 - Analyst's recommendations are reviewed by Project Team (return to *Step 5*).

5. Notes on the Change Control Process

<Modify Sections 3 and 5 to meet the needs of your project.>

1. A Change Request is:

- Included in the project only when both Sponsor and Project Team agree on a recommended action.

2. The CR may be:

- *Low-impact* – Has no material affect on cost or schedule. Quality is not impaired.
- *Medium-impact* – Moderate impact on cost or schedule, or no impact on cost or schedule but quality is impaired. If impact is negative, Sponsor review and approval is required
- *High-impact* – Significant impact on cost, schedule or quality. If impact is negative, Executive Committee review and approval is required

3. For this project:

- *Moderate-impact* – Fewer than *X* days change in schedule; less than \$XX change in budget; one or more major use cases materially degraded
- *High-impact* – More than *X* days change in schedule; more than \$XX change in budget; one or more major use cases lost.

4. All project changes will require some degree of update to project documents:

- *Low-impact* – Changes likely require update only to requirements and specifications documents
- *Moderate- or high-impact* – depending on the type of change, the following documents (at a minimum) must be reviewed and may require update:

Type of Change: *Documents to Review (and update as needed):*

5. Notes on the Change Control Process

- Scope
 - Scope Statement and WBS
 - Budget
 - Project Schedule
 - Resource Plan
 - Risk Response Plan
 - Requirements
 - Specifications
- Schedule
 - Project Schedule
 - Budget
 - Resource Plan
 - Risk Response Plan
- Budget
 - Budget
 - Project Schedule
 - Resource Plan
 - Risk Response Plan
- Quality
 - Budget
 - Project Schedule
 - Resource Plan
 - Risk Response Plan
 - Quality Plan
 - Requirements
 - Specifications

5. Project documents:

Whenever changes are made to project documents, the version history is updated in the document and prior versions are maintained in an archive. Edit access to project documents is limited to the Project Manager and designated individuals on the Project Team.

- For this project, all electronic documents are kept in (select one of the following and describe it in the adjacent space provided):

Version Control System:

Central storage available to the Project Team:

Other:

- For this project, all paper documents are kept in (select one of the following and describe it in the adjacent space provided):

Project file maintained by the Project Manager:

Other:

- The following individuals have edit access to project documents:

Role	Documents
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5. Notes on the Change Control Process

▪ Project Manager	▪ All current documents
▪	▪ Project archive
▪	▪
▪	▪
▪	▪

6. Project Change Management Plan / Signatures

Project Name:			
Project Manager:			
<i>I have reviewed the information contained in this Project Change Management Plan and agree:</i>			
Name	Role	Signature	Date (MM/DD/YYYY)

The signatures above indicate an understanding of the purpose and content of this document by those signing it. By signing this document, they agree to this as the formal Project Change Management Plan.