



**Ministry of Education  
Information & Technology Management Branch  
Project Support Office**

**Project Change Management Process**

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## Document Change Record

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## 1.0 Document Purpose

The purpose of this document is to provide project managers with the standard process for managing changes on ITMB projects.

## 2.0 Related Documents

*Automated Project Items Control using PVCS Tracker*, describes the process for recording and tracking risks, issues, change requests and quality control items using *PVCS Tracker*.

## 3.0 Purpose and Objectives

The purpose of change management procedures is to manage change requests so that approved changes will be controlled, ensuring the project remains on schedule, within budget and provides agreed deliverables.

The primary objectives of change management are to:

- manage each change request from initiation through to closure;
- process change requests based upon direction from the appropriate authority (e.g., project director approval);
- communicate the impact of changes to appropriate personnel; and
- allow small changes to be managed with a minimum of overhead.

## 4.0 Scope

The Change Management Process is the mechanism used to initiate, record, assess, approve and resolve project changes.

Project changes are needed when it is deemed necessary to change the scope, time or cost of one or more previously approved project deliverables. Most changes will affect the budget and/or schedule of the project.

## 5.0 Policy

The use of the formal change management procedure will be required when any changes are discovered or requested which impact previously reviewed, approved and published project deliverables.

The PSO supports the change management process. The role of the PSO in the change management process is determined, with the project manager, once the project is approved.

The documentation and tracking of all change requests will be managed using the defined procedure and facilitated by the use of PSO templates or PVCS Tracker.

A multi-tiered approach will be used to approve change requests:

- Decisions to analyze and decisions to proceed with changes will be made by the ITMB Client Manager and the Project Manager if they do not impact scope, budget or schedule.
- Changes which do impact scope, budget or schedule will be forwarded to the Steering Committee for review.
- The Steering Committee may decide that Executive Sponsor approval and review is required before making a decision.

## 6.0 Procedures

Each request will be tracked from the time of presentation through:

1. Identify (identify and document the required change)
2. Validate (verify the change is valid and requires management)
3. Analyze (analyze and record schedule, cost and effort impact of change)
4. Control (decide whether to execute the change)
5. Action (execute decision, including revision to project plans if necessary)
6. Close (verify that action is complete and close change request)

### 6.1 Identify Change Request

<b>Action</b>	<b>Responsibility</b>
1. Identify and record the issue.	Project Manager or Team Lead

### 6.2 Validate Change Request

<b>Action</b>	<b>Responsibility</b>
2. Identify member of the management team as the issue owner.	Project Manager, ITMB Client Manager
3. Validate change request with project team members as appropriate.	
4. Assess and evaluate change for necessity to project, accuracy, and fair representation of Ministry and Contractor interests.	
5. Present change request to Change Analyst.	
6. Update change request with target date for completion of analysis.	

### 6.3 Analyze Impact

<b>Action</b>	<b>Responsibility</b>
7. Meet Contract requirements for responding to Change Requests.	Change Analyst
8. Assign resources to review the impact of the change request.	
9. Direct activity to assess the scope, cost and schedule impact of the change.	
10. Update change request with impact analysis and estimates in terms of scope, cost, schedule and effort impacts.	
11. Present analysis to Project Manager.	
12. Update change request with target date for decision.	Project Manager

## 6.4 Control Change Request

<b>Action</b>	<b>Responsibility</b>
13. Meet Contract requirements for responding to Change Requests. 14. Determine required approvals and assign priority to the change request. 15. If changes impact scope, budget or schedule place request on agenda for next Steering Committee meeting. 16. If changes do not impact scope, budget or schedule decide whether to proceed with the change.	Project Manager, ITMB Client Manager
17. If Executive approval is required, forward request to Executive Sponsor for approval. 18. If Executive approval is not required, decide whether to proceed with the change.	Steering Committee
19. Decide whether to proceed with the change.	Executive Sponsor
20. Generate approval signature sheets for each outstanding change request. 21. Update status of change request with control decision.	PSO

## 6.5 Action Change Request

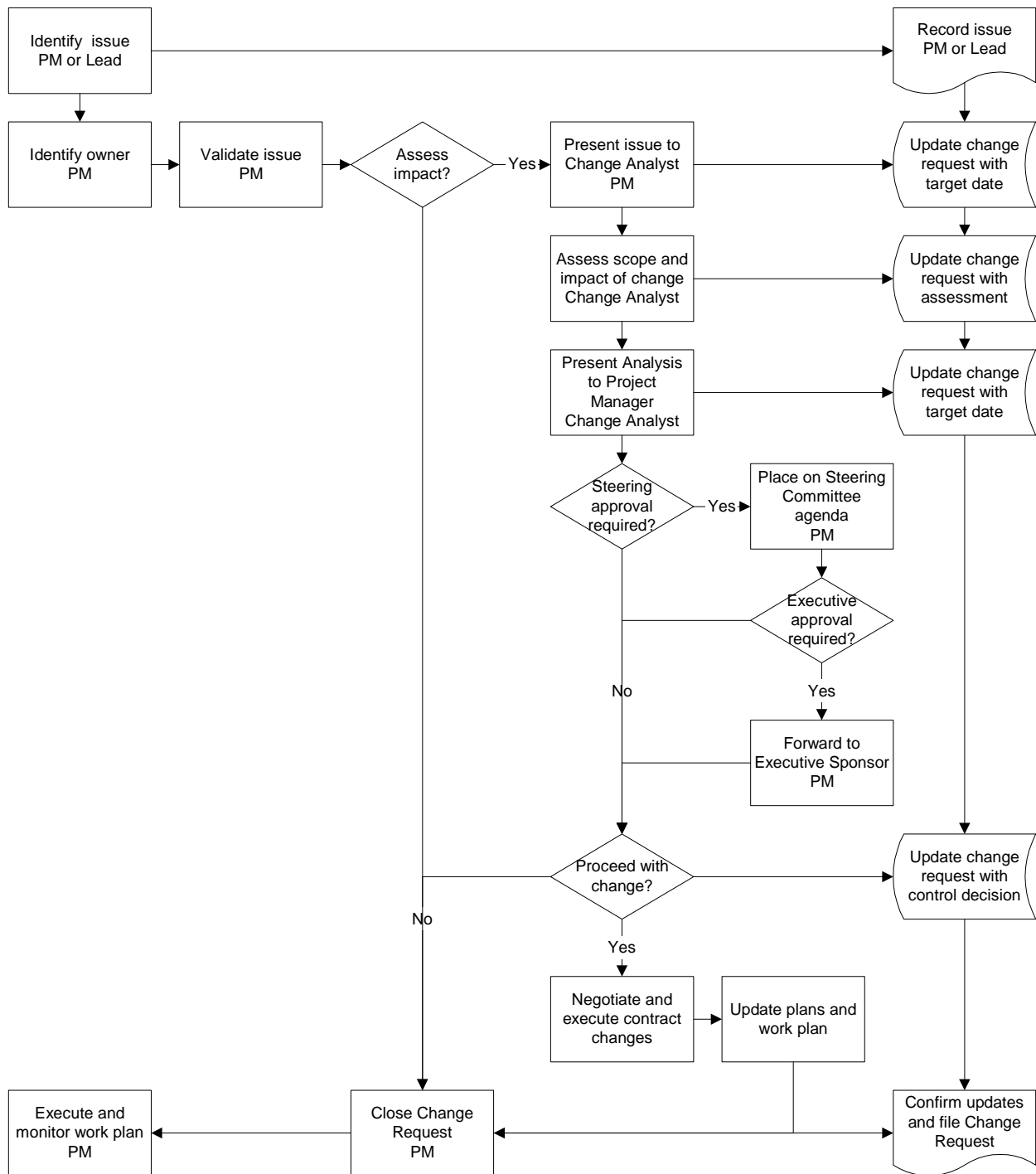
<b>Action</b>	<b>Responsibility</b>
22. Negotiate contract changes.	Project Manager, Client Manager, Business Manager
23. Execute contract changes.	Contract Unit
24. Incorporate change request into appropriate plans and work plan. 25. Update work plan baseline for agreed changes.	Project Manager

## 6.6 Close Change Request

<b>Action</b>	<b>Responsibility</b>
26. Close change request and transfer ownership to PSO for filing. 27. Communicate work plan change to project team. 28. Monitor and report progress against project plan.	Project Manager
29. Confirm all updates have been recorded and file all Change Request Documents.	PSO

The overall flow of the change request process is presented on the following page.

### 6.7 Change Management Process Diagram



## **Appendix A: Forms and Templates**

Manual Change Request Form

**CHANGE REQUEST FORM**

<Project Name>

CR ID #

<b>Submitter's Name:</b> <b>Functional Area:</b> <b>Phase/Process:</b> <b>Client Request:</b> Yes              No		<b>Submit Date:</b> <b>Priority:</b> Critical    High    Medium    Low <b>Assigned to:</b> <b>Target Date:</b>	
<b>Status:</b> Open    Validated    Assigned    Analyzed    Approved    Resolved    No Action    Closed			
<b>Change Details</b> (describe the issue, reason for the change, impact of not performing the change)			
<b>Impact Assessment</b> (describe the scope and impact of the change, continue on next page, if necessary)			
<b>Estimated Impact:</b>		<b>Effort:</b>	<b>Cost:</b>
		<b>Schedule:</b>	
<b>Estimate certified by:</b>		_____ <Change Analyst>	_____ Date
<b>Recommendation:</b> (describe recommended action, continue on next page, if necessary)			
<b>Actual Impact:</b>	<b>Effort:</b>	<b>Cost:</b>	<b>Schedule:</b>
<b>Accepted by:</b>		<b>Approved by:</b>	
Consultant:	Date	Project Manager:	Date
Approved by:		Approved by:	
Client Sponsor:	Date	Executive Sponsor:	Date
Associated Problem Report		Associated Risk or Issue Form	
FORM PMT312		Page (6) of (10)	

### Manual Change Request Log

ID	Title	Status	Priority	Submit Date	Submitter	Target Date	Assigned To:	Close Date	Owner	Estimated Cost	Actual Cost	Description	Notes
1													
2													
3													
4													
5													