**[Insert Department Name]**

**Project Change Control Management Plan**

**[Insert Project Name]**

Version History

| Version # | Date | Author | Key Differences |
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Introduction to the Project Change Control  
 Management Plan Template

Project Change Control Management involves monitoring and controlling changes to project baselines.

Within the Project Change Control Management Plan, the Change Control Process (CCP) describes the actions required to make changes to the project’s approved and baselined documents, schedule, scope, costs, and other parameters. A formal CCP aids management by defining the process of requesting, assessing, authorizing, monitoring and controlling change. Adhering to the CCP prevents unauthorized changes, minimizes disruptions to the project environment and ensures proper analysis and input.

The following sections are constructed to match the suggested heading structure for the Project Change Control Management Plan. Each section provides instructions and descriptions to understand and complete it.

Template style conventions are as follows:

| Style | Convention |
| --- | --- |
| Normal text | Indicates placeholder text that can be used for any project. |
| [Instructional text in brackets] | [Indicates text that is be replaced/edited/deleted by the user] |
| *Example text in italics* | *Indicates text that might be replaced/edited/deleted by the user* |

As you complete the template, please remember to delete all instructional text (including this section) and update the following items, as applicable:

* title page
* version history
* table of contents
* headers
* footers

Update the document to a minor version (e.g., 1.1, 1.2) when minimal changes are made and a major version (e.g., 2.0, 3.0) when significant change are made.

# Introduction

[This section should provide the purpose of the Project Change Control Management Plan.]

*Example:*

*The purpose of the Project Change Control Management Plan is to document how project changes are to be requested, assessed, approved, monitored and controlled. This plan defines the Change Control Process (CCP) to standardize the procedures for efficient and prompt handling of all project Change Requests (CR). A formal, repeatable process minimizes the risk when introducing change to the project environment and helps preserve quality. The Project Change Control Management Plan defines the activities, roles, and responsibilities necessary to effectively and efficiently manage and coordinate the change process.*

# Approach

[Outline the overall change control management approach and process for the project. Describe, in general terms, the activities associated with change control and the roles involved. Include a high-level description of the tools used and provide any other information relevant to change control for the project, as necessary.]

Example:

The CCP describes the actions required to make changes to the project’s approved and baselined documents, schedule, scope, costs, etc. A formal CCP aids management by defining the process of requesting, assessing, approving, monitoring and controlling change. Adhering to the CCP prevents unauthorized changes, minimizes disruptions to the project environment and ensures proper analysis and input.

The high-level Change Control Process includes the following activities:

* *Request Initiation and Processing*
* *Review*
* *Analysis*
* *Decision*
* *Implementation (including Scheduling and Coordination)*

# Roles and Responsibilities

[The table of Roles and Responsibilities provides a description of the duties of those involved in the CCP. Adapt as needed to specific project needs.]

*Example:*

| Name | Role | Responsibility |
| --- | --- | --- |
| [Name] | *Project Sponsor(s) (could also include multiple Sponsors or an Executive Steering Committee)* | * *Final approving authority for the Change Control Management Plan, by consensus if there are multiple Sponsors.* * *Determines the need for and composition of a Steering Committee.* * *Makes decisions on CRs escalated by the Change Control Board (CCB).* |
| [Name] | *Change Control Board (CCB)* | * *Primary decision-making body for CRs.* * *Meets on a regular basis to address outstanding CRs and escalates to Project Sponsor(s) and/or Executive Steering Committees, as necessary.* * *Take action on CR decisions by Project Sponsor(s) and/or the Executive Steering Committee.* |
| [Name] | *Project Manager* | * *Creates or delegates the creation of the Change Control Management Plan.* * *An active sponsor of approved changes.* * *Manages the CCP and any resistance to approved changes.* * *Approves CRs for analysis.* * *Assigns the CR analysis to a Change Owner.* * *Reviews the scope, budget and schedule impacts.* * *Assigns project resources for CR analysis and, if approved, implementation.* * *Reviews the CR implementation after it is deployed.* * *Communicate CR status/decision back to Stakeholders.* * *Votes as a member of the CCB. (May or may not be the CCB chairperson, depending on project size and complexity.)* * *Initiates the escalation process to the Executive Steering Committee, as needed.* |
| [Name] | *Change Request Originator* | * *Identifies the potential change.* * *Completes the CR Form (CRF).* * *Prepare supporting documentation for the CR.* * *Obtains manager approval to submit the CRF to the CR Coordinator (CRC).* * *Submits CRF to the CRC.* |
| [Name] | *Change Request Originator’s Manager* | * *Reviews and approves the CRF created by the CR Originator.* |
| [Name] | *Change Request Owner/Analyst* | * *Identifies possible solutions and their impact to the project and its Stakeholders.* * *Takes ownership and works with the project team to analyze, evaluate, and, if approved, implement CRs.* * *Verifies CRs are implemented correctly.* |
| [Name] | *Change Request Coordinator (CRC)* | * *Single point of contact for CRs.* * *Receives and records CRs in the chosen tracking tool.* * *Performs initial CR risk assessment and follows up with the Risk Manager.* * *Reviews the CR’s impact to the project’s scope, schedule and cost.* * *Schedules and transcribes the CCB meetings.* * *Maintains the CR tracking tool, monitors CR progress and reports status regularly.* * *Produces metrics on CRs.* * *Measures the overall quality of the CCP to report trends and make recommendations for process improvement.* * *Maintain project CR documentation in project library.* |

# Change Control Process

[Clearly identify or list the items that are subject to change control and the CPP (e.g. cost, scope, schedule, configuration items, requirements, the PMP and subordinate plans).]

## Project Baselines

[Clearly identify or list the items that are subject to change control and the CPP (e.g. cost, scope, schedule, configuration items, requirements, the PMP and subordinate plans).]

## Approval Thresholds

[Depending on the size and complexity, a project may choose to implement approval thresholds based on project roles to increase the efficiency of the decision making process. For example, the thresholds can be based on dollar amount and/or level of impact, and decisions can be assigned to the Project Manager, the CCB, or the Executive Steering Committee based on the criteria chosen. ]

## Change Control Process Description

[Describe the CCP process, including the roles and responsibilities, inputs and outputs, cycle times and how it identifies, manages, and tracks CRs through implementation. Include a swim lane diagram.]

## Change Control Board

[Document membership for the project’s CCB. A typical CCB includes the product manager, development manager, Project Manager, test lead or manager, subject matter experts, business analysts, senior management, and clients, if warranted. The CCB should remain relatively small and have the breadth of expertise and ability needed to respond to requests promptly and efficiently. Also describe the frequency and format of the CCB engagement.]

## Project Change Request Tracking

[Describe what type of tracking mechanism the project will use to track the status and implementation of CRs. Depending on the size and complexity of a project, this may include an automated tool or a more simplified tool such as a spreadsheet.]

# Change Request Reporting

[Describe the CR reporting needs on the project, including the title, frequency, content, and usage.]

*Example:*

| Title | Frequency | Content | Usage |
| --- | --- | --- | --- |
| Opened, Pending, and Approved CRs | Regularly Scheduled Team Meeting (Weekly) | Summary of the CRs that have been opened, still pending and approved since the last reporting. | Keeps the project team and Stakeholders informed about the changes being made. |
| CR Implementation Status | As Completed | Lists all CRs approved for implementation, activities to implement, estimated completion date, and current status. | Used by management, the CRC, and CR Owners to track CR implementation. |
| Metrics Report | Monthly | Identifies the total number of CRs opened, approved and pending. Include aging statistics that show how long it takes to approve a CR, the duration at each phase of the process, the number of CRs referred to CCB and ESC, and the number of rejected CRs. | Include as part of quality reporting. |