

**Change Request Template**

Changes are an inevitable part of projects. While changes can be disruptive, they are far better than to deliver the wrong thing! This simple change request also turns into an analysis sheet once it is submitted.

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| **Name of Project** | |  | |
| **Name of Requestor** | |  | |
| **Summary of Request** | | | |
|  | | | |
| **Reason for Request** | | | |
|  | | | |
| **Impact if Change is Not Made** | | | |
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| ***Project Team Use Only*** | | | |
| Change Request ID |  | Assigned To |  |
| Analysis Due | Click here to enter a date. | Support Resources |  |
| Analysis Summary | | | |
|  | | | |
| Recommended Action | Choose an item. | Project Manager |  |
| Change Board Decision | Choose an item. | Change Board Date | Click here to enter a date. |
| Requestor Advised | Click here to enter a date. | Project Plan Updated | Click here to enter a date. |

**Guidelines:**

* **Name of Project**: The project for which the change is being requested
* **Name of Requestor:** The person who is asking for the change to be made
* **Summary of Request**: The description of the request that is being asked for. This should be as detailed as necessary to allow the project team to understand exactly what is being requested. It should clarify any of the following that apply:
  + Scope changes
  + Schedule changes
  + Budget changes
  + Quality standard changes
  + Risk tolerance changes
  + Specific resource changes
* **Reason for Request**: The background and explanation to the request. This should explain why the request is important to the project and should highlight the benefits that will be gained by incorporating the change into the initiative. In conjunction with the next field (Impact if Change is Not Made), it will provide the logic for the request being made
* **Impact if Change is Not Made:** The repercussions for the project if the change is not approved. This should be a realistic assessment and should focus on challenges with the project’s ability to meet its goals; ultimately, the decision on whether to approve or reject will (at least in part) come down to the costs identified here versus the costs of making the change. This field combines with the previous field (Reason for Request) to provide the logic for the request being made.

The remaining fields are for the use of the project team in assessing the request:

* **Change Request ID**: The request should be logged in a change log and a unique identifier assigned that will assist with tracking. All documentation associated with the change should carry this ID.
* **Assigned To**: The person assigned to carry out or to lead the analysis. This person should be viewed as the change request owner and should be the person who has the greatest understanding of the area(s) of the project that are impacted and the extent of that impact. See also Support Resources below.
* **Analysis Due**: The date by which the owner/person that the analysis is assigned to needs to have completed their analysis and provided a recommendation to the project manager for submission to the change control board. This date should be determined by the owner and project manager in partnership and should reflect the unique circumstances of each change; arbitrary timelines will not be successful.
* **Support Resources:** Additional team members and/or stakeholders who will assist the change owner in conducting the analysis. These may not be required for every change, but for more complex requests these individuals will be invaluable. Individuals should be identified rather than teams to drive accountability.
* **Analysis Summary**: The summary of the work carried out by the owner and any support resources. This should focus on the impact of the change to the project constraints (including quality and risk) and should also reflect areas of uncertainty where the impact may be larger than has been able to assess accurately within the analysis period. This area should also consider the impact to the deliverables if the change is not approved.
* **Recommended Action**: This is the recommendation of the change owner. The dropdown options can be modified to suit your needs.
* **Project Manager**: The PM should put their name to the recommended action to indicate that they have discussed the change with the owner after the analysis has been completed; they are in agreement with the recommendation that is going to the change control board.
* **Change Board Decision**: The decision reached by the change control board or equivalent governance function after reviewing the request and analysis. The dropdown option can be modified to suit your needs but should remain consistent with the options in the Recommended Actions category.
* **Change Board Date**: The date that the change control board decision is made.
* **Requestor Advised**: The date that the person requesting the change is advised of the change control board decision. This is the accountability of the project manager although they may delegate responsibility to a member of the team (commonly the team’s change owner).
* **Project Plan Updated**: The date when all of the changes to the project plan have been made (if necessary) after the change control board’s decision. This is the accountability of the project manager.