# CHANGE MANAGEMENT POLICY

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<th>Code:</th>
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<tr>
<td>Version:</td>
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<td>Confidentiality level:</td>
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Change history

<table>
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<th>Date</th>
<th>Version</th>
<th>Created by</th>
<th>Description of change</th>
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<tbody>
<tr>
<td>xx/xx/2013</td>
<td>0.1</td>
<td>Branimir Valentic</td>
<td>Basic document template</td>
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1. **Purpose, scope and users**

The purpose of this policy is to ensure that changes of [organization name] are managed through an established process.

This policy applies to all [company name] full-time, part-time and contracted employees, vendors and suppliers involved in activities that use or manage technology solutions within [company name].

Users of this document are employees of [IT Service Management organization].

2. **Reference documents**

- Change Management Process
- Service Level Management Process
- Service Asset and Configuration Management Process
- Service Portfolio Management Process
- ISO/IEC 20000-1:2011, clauses 5.1; 6.6.3; 8.1

3. **Policy**

The Change Management process manages the life cycle of all changes, enabling changes to be made without disruption of IT services. A change is an addition, modification or removal of anything that would have an effect on IT services.

3.1. **Scope and goals of Change Management process**

[organizations name]’s scope of the Change Management process covers:

- Services (new or changed)
- Management information systems and tools
- [Technology architecture] Processes
- Measurement systems
- All documents used by [organization name] for IT Service Management (ITSM)
- All Configuration Items (CIs, see Service Asset and Configuration Management Process) across the service lifecycle

The goals of the Change Management process are:

- To ensure that changes are documented, evaluated and, for authorized changes, that they are planned, prioritized, tested, implemented and documented.
- Ensure that all changes on Configuration Items are documented in the Configuration Management System (CMS, see Service Asset and Configuration Management Process).

3.2. **Unauthorized changes**

Comment [BV3]: ***OPTION***
Replace this with "SMS" if you are implementing ISO 20000.

Comment [BV4]: ***OPTION***
Delete this if you are implementing ISO 20000 and not ITIL.

Comment [BV5]: ***OPTION***
Delete this if you are implementing ITIL and not ISO 20000.

Comment [BV6]: ***OPTION***
Delete this if you are implementing ISO 20000 and not ITIL.

Comment [BV7]:

Comment [BV8]: ***OPTION***
If you are implementing ISO 20000, replace this text with “defining, deploying, managing and improving SMS.”

Comment [BV9]: This is best practice. Define your own goals.

Comment [BV10]: ***OPTION***
Delete this section if you implement only ISO 20000, and not ITIL.
3.3. **Tool integration**

[tool name] is a tool that supports the Change Management process and activities. [role description] is responsible to [...] in case unauthorized changes are detected.

3.4. **Process guidelines**

Changes significantly impact operational services and respective business processes. Therefore, setting up a Change Management process considers the following parameters and decrease level of risk:

### 3.4.1. **Compliance**

The Change Management process considers the following regulations and legislative requirements:

- [...]  

### 3.4.2. **Documentation**

Every change is supported by a Request for Change (RFC) document (see Request for Change and Change Record in Appendix). Changes which don’t have a RFC are declined; otherwise they will be considered and handled as unauthorized changes. All RFCs are recorded in [...] and classified; see Change Log in Appendix. [...] [who raised the description] – see Request for Change and Change Record in Appendix.

[role description] is responsible for change, i.e. assessment of the RFC template. RFCs are analyzed by [Change Manager] on an [...] [CSI Manager] to identify improvements.

### 3.4.3. **Types of changes**

[organization name] defines the following types of changes (see Service Level Agreement in Appendix of Service Level Management):

- Standard change
- Normal change
- Emergency change

### 3.4.4. **Authorization Responsibilities**

All changes must be authorized. [organizations name] uses the following authorization model:

<table>
<thead>
<tr>
<th>Type of Change</th>
<th>Authorized by (Change Authority)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minor</td>
<td>Pre-authorized</td>
</tr>
<tr>
<td>Significant</td>
<td>Change Advisory Board (CAB)</td>
</tr>
</tbody>
</table>

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3.4.5. Handling changes

[Change Manager] is responsible for:

- Defining and agreeing on the change [management role] changes are released during the change window; see Change Schedule in Appendix.
- Grouping – When changes concern the same service, they are linked to the master RFC and implemented through release.
- Applying impact assessment of change
- Reviewing changes [monthly] to identify trends and possible improvements. Evaluation based on the review, is sent to [role description].
- Remediation – Identifying and agreeing on the definition of necessary changes and procedures for handling with such cases.
- Initiating updates of the Service Catalogue, Service Level Agreement, Operational Level Agreement and Underpinning Contract after the change was successfully implemented.

Major changes belong within Normal changes (see section “Types of changes”); they are handled in the following way:

- [Besides the RFC, a Change Proposal (see Change Proposal in Appendix of Service Portfolio Management) must exist. The Change Proposal is prepared by [...]]

Removal of a service and transfer of a service from the service provider to the customer or a different party are classified in Change Advisory Board with the consent to have a major impact and are handled in the following way:

- [...]

3.5. Change Advisory Board (CAB) and Emergency Change Advisory Board (ECAB)

The CAB is appointed by [...]. The CAB has the following characteristics:

- Chaired by [Change Manager].
- [...]
- Appointment to the CAB meeting is sent by [Change Manager] [seven] days before meeting.

ECAB has permanent members [...].
The ECAB is chaired by [Change Manager].

The CAB produces the time plan (see Change Schedule in Appendix) for implementation. [Change Manager] is responsible to distribute the time plan to all interested parties.

4. **Validity and document management**

This document is valid as of [date].

Owner of this document is [job title], who must check and, if necessary, update the document at least once a year.

5. **Appendices**

- Appendix 1: Request for Change and Change Record
- Appendix 2: Minutes of Meeting CAB
- Appendix 3: Change Schedule

[job title]

[name]

[signature]

Comment [BV41]: e.g. CIO

Comment [BV42]: e.g. Technical Manager, IT Operations Manager.

Comment [BV43]: Usually ECAB chair.

Comment [BV44]: This is only a recommendation; adjust frequency as appropriate.

Comment [BV45]: Only necessary if the Procedure for Document Control prescribes that paper documents must be signed.