Change Management

Definition
Change Management is a defined process for managing any change made to a production environment. The aim is to ensure that standardized methods and procedures are used for efficient handling of all changes from inception to completion, minimizing risk and disruption to services.

Roles and Responsibilities

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
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<tbody>
<tr>
<td>Change Owner/Assigned To</td>
<td>Generate change request with all required information (business justification, implementation and remediation plan, etc.) and submit. Provide CAB representation when necessary. Owns the Change Request from creation to closure.</td>
</tr>
<tr>
<td>Assessor</td>
<td>Ensure all required information is provided in the change request, a thorough evaluation of risk has been completed and complete a technical assessment based on knowledge of the production environment and business. Assignment Group Manager.</td>
</tr>
<tr>
<td>Change Approver</td>
<td>Review change to determine its readiness for implementation and/or risk.</td>
</tr>
<tr>
<td>Change Manager</td>
<td>Authorize change requests, convene and chair Change Advisory Board (CAB) meetings, ensure Forward Schedule of Changes (FSC) is current and available, conduct Post-Implementation Reviews (PIRs) when necessary, authorize change templates and final confirmation point for Emergency Changes.</td>
</tr>
<tr>
<td>Implementer</td>
<td>Responsible for executing the change tasks. Upon completion, they must update the task with appropriate information and select closure code and/or status. There may be multiple implementers for a given change request, each assigned their own tasks.</td>
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<tr>
<td>Change Advisory Board (CAB)</td>
<td>Advise or assist the Change Manager with approval for high and very high change requests, Change implementation scheduling, conduct PIRs, approve change templates.</td>
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<tr>
<td>Emergency Change Advisory Board (ECAB)</td>
<td>Provide advice to the Change Manager in the event of a declared emergency change. The ECAB is a subset of the CAB and may be called upon at any hour of the day to approve an Emergency change request.</td>
</tr>
<tr>
<td>Change Process Manager</td>
<td>Day-to-day execution of the process.</td>
</tr>
<tr>
<td>Change Process Owner</td>
<td>Establishes and ensures consistent execution of the process. Receives input and incorporates process improvements. Provides executive process metrics and reconciles process issues. A Senior Leader.</td>
</tr>
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</table>

High-Level Process Diagrams

[Diagram showing the process flow: RAISE AND RECORD -> IMPLEMENT -> REVIEW AND CLOSE.]

- Standard (Pre-authorized)
  - Create Change Request record with all necessary information about and tasks needed to implement the change including impact, back-out plans, scheduled time and downtime required
  - Perform and verify approved implementation tasks
  - Remediation (fallback/backout) is implemented if necessary
  - Review and close the change record

*Full documentation can be found on https://uit.stanford.edu/service-management/processes*
Create Change Request record with all necessary information about and tasks needed to implement the change including impact, back-out plans, scheduled time and downtime required

Review and assess the Normal/Expedited change record
Ensure all tasks, assignments, dates, and details are appropriate and complete

CAB review, approve and schedule the request, which may include the creation of additional tasks
Obtain necessary approvals in order for the change to proceed
Once approved, schedule the change for implementation

Perform and verify approved implementation tasks
Remediation (fallback/backout) is implemented if necessary

Review and close the change record

Perform necessary change implementation tasks
Remediation (fallback/backout) is implemented if necessary

Create Change Request record with all necessary information about and tasks needed to implement the change including impact, back-out plans, scheduled time and downtime required

Review and close the change record

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