

Template instructions: All text in italics is instructional and will help you to complete the template. It should be removed from your document. Text in double angle brackets (<>) should be replaced.

A change request should be completed for each major change to a project's scope, budget or schedule. Change requests should at a minimum be approved in writing by the project's Project Sponsor and Steering Committee (if applicable). You should also have the change request approved in writing by the funder if the change is funder-driven or significantly impacts the scope, budget or schedule of a project.

Projects often have multiple change requests, so you should use a numbering system (e.g., 1, 2, 3, etc.) in the filename and title to help differentiate them.

<<Project Name>> - Change Request # <<#>>

Last Updated: <<DATE, TIME>>

Summary		
Date Raised: <i>Date that the issue was first raised</i>	Raised By: <i>Person that requested or recommended the change</i>	Urgency: <i>High, Medium or Low</i>
Description: <i>A very brief description of the change that needs to be made.</i> <i>Example:</i> <i>The funder has requested that a pilot of the curriculum be added to the project. No additional funding can be provided by the funder to do so.</i>		
Additional Documentation: <i>A list of other documents that have been created or changed as a result of the change request.</i> <i>Example:</i> <ul style="list-style-type: none"> • <i>Proposed Scope Statement v0.1 (Aug 22-10)</i> • <i>Proposed Budget v0.2 (Aug 20-10)</i> • <i>Proposed Schedule v0.1 (Aug 22-10)</i> 		
Details		

Benefits:

A list of the benefits of making the change, or any consequences of not making the change. This is written from the project manager's perspective, but should consider the needs of all stakeholders including the funder.

Example:

- *piloting the curriculum would allow us to test its effectiveness before wide release*
- *funder has expressed that this is a very high priority for them*

Drawbacks:

A list of the drawbacks of making the change. Again this should reflect the needs of all stakeholders.

Example:

- *properly piloting the curriculum will significantly impact our schedule and budget*

Proposed Solution:

A brief outline of the solution being proposed by the project team to address the change request, and any relevant information that helped to form that solution.

The project manager should look for a solution that will meet the need but which has less of an impact on the project, such as making the change through a separate project with separate funding or by reducing the project scope.

Example:

Research on similar curriculums suggests that to be effective, the curriculum will need to be piloted for 15 days with three separate groups.

The project team has estimated that such a pilot would result in a 25 day delay in the final release of the curriculum, and cost an additional \$11,500. This includes the additional effort and cost needed for training and coordination of the pilot groups and for making minor revisions after the pilot is completed.

Because the funder has indicated this is a high-priority request, the project team recommends that that the reference manual that was to be developed for the project no longer be included. Both the funder and project team have previously agreed that the manual is lower priority.

These proposed revisions to the scope statement, budget and schedule that would be needed for

this solution are included with this change request.

Project Impact

A brief outline of the overall impact that the change would have on the rest of the project, particularly the scope, budget and schedule.

Example:

The project team has estimated that by removing the manual, a pilot of the curriculum can be included with no additional cost and only a 10 day delay in the release of the curriculum.

Recommendation and Decisions

<p>Project Manager's Recommendation (circle):</p> <p><i>Accept / Reject / Defer</i></p>	<p>Date: <<Date>></p>	<p>Name: <<Project manager's name>></p>
<p>Project Sponsor's Decision (circle):</p> <p><i>Accept / Reject / Defer</i></p>	<p>Date: <<Date>></p>	<p>Name / Signature:</p>
<p>Steering Committee's Decision (circle):</p> <p><i>Accept / Reject / Defer</i></p>	<p>Date: <<Date>></p>	<p>Name / Signature:</p>
<p>Funder's Decision (circle):</p> <p><i>Accept / Reject / Defer</i></p>	<p>Date: <<Date>></p>	<p>Name / Signature:</p>

Comment [ms1]: What do you think about including these (Steering Ctte + Funder)? If you remove it, I've included an instruction up at the top that should be revised as well.