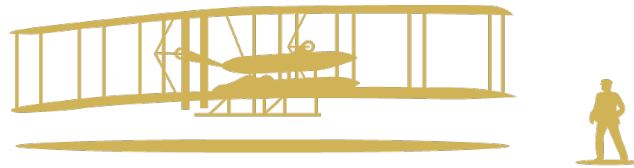


**ITSM - Change Management
Project Charter**

**Wright State University
Computing and Telecommunications Services (CaTS)**



**WRIGHT STATE
UNIVERSITY**

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1.1 Project Sponsors

Sponsor	Representing	Contact Information
Craig Woolley	CIO	x4008
Michael Natale	CISO	x3910
Larry Fox	CaTS - Technical Services	x4009
Michael Stankas	CaTS – Information Services	x4005
Kenny Coon	CaTS – Client Services	x4822

1.2 Project Definition

Implement Change Management processes for IT services managed by CaTS.

Change Management (ITILv3, ST, page 306) is defined as, “the addition, modification or removal of anything that could have an effect on IT services. The scope should include changes to all architectures, processes, tools, metrics, and documentation, as well as changes to IT services and other configuration items”.

1.3 Project Scope

Within the scope of this project:	Outside of the scope of this project:
<p>High level processes to be implemented for CaTS Change Management.</p> <p>Defining specific roles and responsibilities within the Change Management processes.</p>	<p>Specific, low level work procedures for completing individual change tasks.</p>

1.4 Organizational Scope

Within the scope of this project:	Outside of the scope of this project:
<p>All changes conducted by CaTS.</p> <p>The addition of services or configuration items into the production environment.</p> <p>The modification of existing services or configuration items currently in the production environment.</p> <p>The retirement/deprecation of services or configuration items currently in the production environment.</p>	<p>Changes conducted by non-CaTS organizational units.</p>

1.5 Project Objectives

- To control the lifecycle of all changes while minimizing disruption of IT services.
- Ensure that all changes are recorded, evaluated, and authorized.
- Ensure that all authorized changes are prioritized, planned, tested, implemented, documented, and reviewed in a consistent manner.
- Ensure that all changes to configuration items are recorded.
- Optimize business risk.

1.6 Project Benefits

- Protecting business services of the university while making required changes.
- Responding to changing business needs of the university.
- Meet various governance, legal, and regulatory compliance requirements.
- Reduction of failed and conflicting changes, thereby reducing incidents, defects, and re-work.
- Tracking of changes, and providing fuller awareness of changes to all stakeholders.

1.7 Project Approach

- A project team will be formed to develop the CaTS Change Management process. The team will utilize ITIL best practices as a foundation for their work, and will be provided an overview of the Service Transition lifecycle stage, and how it interacts with other lifecycle stages.
- The project will be managed within ServiceNow's Project Portfolio Management (PPM) module.
- The time commitment from the project team includes approx. 1 hour per week for a formal project meeting, where the team will provide updates and plan future tasks/deliverables. Some team members may be assigned tasks to be completed between weekly project meetings; these tasks may be individual or small group.

1.8 Project Deliverables

The following deliverables are required from this project, the goal of which is to attain a Level 3 CMMI maturity:

- Definition of standard, normal, and emergency changes, and examples of changes that apply to each change type.
- Defined process for standard, normal, and emergency changes.
- ServiceNow to be used to record, authorize, and manage all changes.
- Define the expectations of a Change Advisory Board. It is expected that the CAB will meet weekly with the task of reviewing, organizing, advising, and post-change reviewing all changes. It is also expected that the CAB will:

- Review past changes for effectiveness, and improvement.
 - Review future changes to ensure collisions with other changes are mitigated; and minimize the effect to users.
- Develop a RACI Matrix to define the expectations of all participants of the Change Management process, including a Change Manager, and person performing change.
 - Develop checklists for change types and define what items are required to be included in the Change record, such as: need for change, testing plan, implementation plan, change plan, communication plan, backout/remediation plan, and risk assessment.
 - Define Critical Success Factors (CSF) and Key Performance Indicators (KPI) to gauge the effectiveness of the Change Management process.
 - Reduction of Major Incidents
 - Currently approx. 50% of all Major Incidents are caused by a change. Set the goal to reduce this to 20%.
 - Ensure all Changes are documented, and follow the defined process.
 - The expectation that all Standard/Routine Changes have documented work procedures, that once approved are considered pre-authorized.
 - Process training to all staff involved in the Change Management process.
 - An awareness of next-steps once Change Management process goes live.
 - Define Maintenance Windows in which to conduct changes.
 - Define Blackout windows when no Changes are to be conducted (e.g., beginning of semester, etc). Determine if blackout windows include standard changes.

1.9 Project Constraints

Project Constraints	Impact (high, medium, low)
Staff resource availability	Medium-High
Lack of ITIL knowledge within the project team and CaTS	Medium
Budget	Medium

1.10 Project Risks

Project Risks	Likelihood (high, Medium, Low)	Impact (high, Medium, Low)
Resource availability due to project and operational work load	Medium	Medium
Limited technical knowledge of ServiceNow's Change module	Low-Medium	Medium
Perception that the change management process is too bureaucratic	Low-Medium	Medium

1.11 Project Resources

Executive Project Champion – Craig Woolley, CIO

Provide overall business direction for the project.

Responsibilities include:

- Approve the project charter and plan (confirm the goals)
- Secure resources for the project
- Keep abreast of major project developments and activities
- Make decisions about project changes (scope creep) with steering committee
- Secure executive level communication to those affected by the project as needed

Functional Project Champions

Kenneth Coon, Director of Client Services

Larry Fox, Director of Technical Services

Michael Stankas, Director of Information Services

Participates in the entire project lifecycle ensuring completion

Responsibilities include:

- Provide or secure functional expertise for the project – subject matter expert(s)

Project Manager – Jonathan Jackson, Manager of IT Service Management

Project Team Members:

1. Jonathan Jackson
2. Kenneth Coon
3. Larry Fox
4. Michael Stankas
5. Mike Natale
6. Reid Allen
7. Steve Nickell
8. Jay Dewani
9. Teresa Carroll
10. Debbie Whisler
11. James Cooper
12. Jerry Hensley
13. Tim Wertz
14. Rich Hadden
15. Chuck Platt, Center for Teaching and Learning

Responsibilities include:

- Accept tasks and complete them on time, working alone or with a team
- Interact constructively to help develop a solution that will work for you and for other departments
- Understand the work to be completed (ask questions – the more questions the better the result at the end of the process – often people assume things differently)
- Complete research, data gathering, and analysis as needed
- Inform the project manager of issues, scope changes, risk and quality concerns
- Pro-actively communicate status to CaTS stakeholders
- Manage expectations

1.12 Project Measures of Success

- Decrease of Major Incidents caused by changes
- Low volume of changes bypassing the change management process
- Low amount of service disruptions caused by changes

1.13 Project Assumptions

- Senior Management will provide active and vocal support for the project
- Sponsors or designees will ensure the required people resources are available
- Time will be provided to develop and implement both processes

1.14 Time Scope

Project Phases	Expected Start Date	Expected End Date
Completed Project Charter	27 September 2017	27 October 2017
Project Team Formed	27 September 2017	27 October 2017
Project Team begins work	27 October 2017	1 December 2017
First set of changes going through process in a test phase	27 November 2017	31 January 2018
Project team review test phase changes, and modify process accordingly. Test changes continue through existing process.	1 February 2018	3 March 2018
Modify/Configure ServiceNow to accommodate process	1 February 2018	30 March 2018
Train staff on process	2 April 2018	20 April 2018
Full roll-out of CM process	30 April 2018	--

1.15 Project Charter Acceptance

The signatures below indicate the undersigned have read and agreed to the contents of the Project Charter and have given approval for the project to be initiated.

Craig Woolley, Executive Project	Champion	Date
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Kenny Coon, Functional Project	Champion	Date
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Larry Fox, Functional Project Champion		Date
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Michael Stankas, Functional Project Champion		Date
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Jonathan Jackson, Project Manager		Date
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