Change Management Policy

1. **Overview**

   1.1. Applications and systems are increasingly more complex in their function, interaction, and form. There is an increasing dependency between resources and applications that can negatively impact operations if not managed and orchestrated in an organized fashion.

   1.2. Effective management and communication of updates, maintenance, and regular releases help to minimize customer impacts. From time to time systems require outages for planned upgrades, maintenance, or fine-tuning. Managing these changes is a critical part of providing a stable infrastructure.

2. **Purpose**

   2.1. The purpose of this policy is to manage changes in a well-communicated, planned and predictable manner that minimizes unplanned outages and unforeseen system issues. Effective change management requires planning, communication, monitoring, rollback, and follow-up procedures to reduce negative impact to the user community.

3. **Scope**

   3.1. This policy applies to all GTM and Globespan Travel Management staff involved in application or system changes, updates, or patches.

4. **Policy**

   4.1. **GENERAL**

   4.1.1. All system and application changes in all organization departments(e.g. operating system, computing hardware, networks, applications, data centers) are subject to this policy and shall follow unit change management procedures.

4.1.2. The following general requirements shall be met in the change management process:

- Scheduled change calendars and departmental communications operational procedures shall be developed to inform stakeholders of upcoming application and system changes that impact system availability or operations
- Regular planned changes shall minimally be communicated to all stakeholders on a monthly basis through a communication mechanism of the IT/Systems department
- Unplanned outages shall be communicated immediately to stakeholders with regular updates on progress towards resolution and resumption of service
- Regular system and application patching schedules shall be communicated to users and performed in such a way as to minimize system downtime and user productivity
- Changes affecting computing environmental facilities (e.g., air-conditioning, water, heat, plumbing, electricity, and alarms) shall to be reported to or coordinated with building management and stakeholders shall be notified through IT change management communications
- Processes shall ensure that production data is not unnecessarily replicated or used in non-production environments
- Device configurations shall be backed up and rollback procedures must exist prior to implementing a change

4.2. CHANGE MANAGEMENT COMMITTEE

4.2.1. A Change Management Committee shall convene to discuss system changes, interactions, and any perceived issues. This committee shall be made up of systems staff, application development owners, finance representatives and chaired by the IT/Systems VP or their designee. The committee shall develop project plans to identify future updates and patching.

4.3. CHANGE REQUEST MANAGEMENT

4.3.1. The following procedure shall be implemented surrounding the change management process:

- Change requests shall be submitted for all changes, both scheduled and unscheduled

- All scheduled change requests shall be submitted in accordance with departmental change management procedures so that the Change Management Committee has time to review the request, determine and review potential failures, and make the decision to allow or delay the system update
- Change requests shall receive Change Management Committee approval before proceeding with the change
- A change review must be completed for each change, whether scheduled or unscheduled, and whether successful or unsuccessful

4.4. CHANGE MANAGEMENT DENIALS

4.4.1. The IT/Systems VP or their designee may deny a scheduled or unscheduled change for reasons including, but not limited to:

- Inadequate change planning or unit testing
- Lack of stakeholder acceptance (where applicable)
- System integration or interoperability concerns
- Missing or deficient roll-back plans
- Security implications and risks
- Timing of the change negatively impacting key business processes
- Timeframes do not align with resource scheduling (e.g. late-night, weekends, holidays, or during special events)

4.5. ADMINISTRATION

4.5.1. A Change Management Log Form shall be maintained for all changes. This log must contain, but is not limited to:

- Date of submission and date of change
- Owner and custodian contact information
- Nature of the change
- Indications of success or failure
- Notes and follow-ons

5. Audit Controls and Management

5.1. On-demand documented procedures and evidence of practice should be in place for this operational policy. Satisfactory examples of evidence and compliance include:

- Historical logs of change events
- Archival Change Management Committee meeting minutes/communications
- Anecdotal documentation and communications showing regular compliance with the policy

6. Distribution

6.1. This policy is to be distributed to all IT/Finance staff.

Review and update of this document will take place when changes require revising the **Change Management Policy**. Such modifications may relate to changes in roles and responsibilities, release of new legislation or the identification of a new policy area, in consultation with appropriate members and their approval on all revisions to this Change Management Policy. When approved a new version of the policy will be issued and all affected departments will be informed of the changes.

Document Configuration Control

Version No	Page No	Details of Change	Change Date	Prepared By	Approved By
1	All			Peter Lacy	Peter Lacy
1.1	All	Review	30 Mar 2021	Peter Lacy	Peter Lacy