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1. Introduction

Proposed change overview.

1.1 Purpose

Identify the desired outcome, as well as what the change seeks to improve.

1.2 Background

Discuss previous issues that lead to the change request.

1.3 Scope

Provide an outline of the scope and detail any omissions.

2. Stakeholders

Overview of stakeholders.

2.1 Stakeholder Review

Identify stakeholders involved or impacted by the proposed change.

STAKEHOLDER REVIEW		
STAKEHOLDER	NATURE OF IMPACT	EXTENT OF IMPACT

2.2 Stakeholder Impact

Discuss how stakeholders will be impacted by the change.

2.3 Communication

Detail how milestones or results will be communicated to stakeholders, including method and frequency.

3. Team

Describe team structure and management.

3.1 Existing Positions

Identify existing positions involved in the change process.

3.2 New Positions

Identify any positions created for the purpose of the change process, or as a result of the implemented change.

3.3 Team Profile

Identify roles and responsibilities of the change management team.

TEAM PROFILE		
TEAM MEMBER	ROLE	RESPONSIBILITIES

4. Cost Analysis

Provide a breakdown of costs for the proposed system and alternatives. This should include design and development, installation, operational costs, maintenance, disposal, and consumables. Conduct analysis of costs for each year so they may be weighed against resulting benefits.

4.1 Development Costs

Breakdown the costs associated with the proposed change per phase. Personnel, equipment, training, software licensing, and tools should be included in the development phase. Provide information in an outline by completing the chart below or provide a link or attachment to a spreadsheet.

CHANGE REQUEST COST ANALYSIS			
ID NO.	PHASE	DESCRIPTION	AMOUNT
1.1	PLANNING		
1.2	REQUIREMENTS		
1.3	DEVELOPMENT		
1.4	TESTING		
1.5	IMPLEMENTATION		
TOTAL			

4.2 Operational Costs

Breakdown the operational costs. Provide information in an outline by completing the chart below or provide a link or attachment to a spreadsheet.

OPERATIONAL COSTS				
CATEGORY	DESCRIPTION	BEGIN DATE	END DATE	COST
	PERSONNEL			
	CONTRACTORS			
	COMMERCIAL SOFTWARE			
	INFRASTRUCTURE			
	FACILITIES			
	SUPPLIES			
TOTAL				

5. Implementation Procedure

Detail the assets and steps necessary to complete the change.

5.1 Asset / Resource Review

Describe any resources or assets required.

5.2 Change Process

List steps in sequence required to complete change.

CHANGE PROCESS		
NO.	STEP	PARTY RESPONSIBLE

5.3 Process Management

Method of management employed throughout the change process.

6. Status Monitoring and Evaluation Process

Discuss milestones and quality benchmarks.

6.1 Monitoring Process

Who will be responsible and what methods will be used to monitor the process?

6.2 Criteria for Evaluation

Define how success will be measured throughout the process.

7. Key Risks

Describe any associated risks. Detail and rank key sources.

7.1 Risk Breakdown and Analysis

Identify potentially limiting external factors. Provide detailed analysis of overall impact of each.

RISK ANALYSIS			
KEY RISK	EXTENT OF IMPACT	NATURE OF IMPACT	IMPLICATIONS

7.2 Preventative Measures

Identify any measures to be taken to avoid risks detailed above.

7.3 Recommended Solutions

Summarise all recommended solutions.

Reference

This tool is freely downloaded and curated as part of an Evi-Pol toolkit for use by science granting councils to inform the development of a digital transformation roadmap. This Change Management Policy Document template was adapted from: <https://www.smartsheet.com/free-change-management-templates> (accessed 9 June 2023).

Refer to this Evi-Pol resource for more information on why, when and how to use this tool/template: Davids, M., and Petersen, I. 2023. Digital transformation roadmap. South Africa: CeSTII-HSRC.