**COMMONWEALTH OF VIRGINIA**



**<Name> Program
Program Organization Change Management (OCM) Plan**

**<Date>**

**Virginia Information Technologies Agency (VITA)**

**Program Organization Change Management Plan Template v1**

#### Publication Version Control

| **Version** | **Control No.** | **Date** | **Revision Description** | **Prepared By:** |
| --- | --- | --- | --- | --- |
| Program Organization Change Management (OCM) Plan\_v1 |  | <Date> | First draft  |  |
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# Document Change Control

After this document is accepted by the Program Management Office (PMO), the approved version is the baseline. All baseline version document changes will be based on an approved change control procedure, as outlined in the Program Change and Configuration Management Plan.

A Change Control Process will be implemented to record significant changes within this document. Significant changes are those that will change the course of the Program and have an impact on the Program’s documented plans and approach.

The updated Change Control Log will be routed to the signatories for acknowledgement and approval. If all signatories attend an oversight committee forum, Program Organizational Change Management Plan Change Log approvals can occur there, and recorded in the minutes.

Once approved, the changes will be recorded in the Program Organizational Change Management Plan Change Control Log in the Appendix and a summary line will be added to the Publication Version Control table in the front of this plan.

|  |
| --- |
| **C:\Documents and Settings\jsj15756\Local Settings\Temporary Internet Files\Content.IE5\UCJ72LZ8\MP900398863[1].jpgLesson Learned/Best Practice**It is a best practice to begin change control after the drafted plan is finalized.  |

# Related Documentation

Related documents include Program-specific documentation, Commonwealth of Virginia standards, policies, guidelines, strategic plans, and industry best practices.

## Applicable Program-Related Documents

Applicable documents are those documents related to the Program. The specified parts of the applicable documents carry the same weight as if they were stated within the body of this document. The following documents are applicable to the Program.

* Program Governance and Quality Management Plan
* Program Communications Management Plan
* Program Post Implementation Review Plan
* Program Risks and Issues Management Plan
* Program Resource Management Plan
* Program Financial Management Plan
* Program Procurement Management Plan
* Program Change and Configuration Management Plan
* Program Architecture Plan
* Program Organizational Change Management Plan
* Program Implementation and Transition to Operations Management Plan

## Applicable Standards, Policies, Guidelines, and Strategic Plans

* Information Technology Resources Management (ITRM) Information Technology Investment Management (ITIM) Standard CPM 516-01
* Glossary of Terms and Acronyms
* ITRM Project Management Standard
* ITRM Program Management Standard
* ITRM Project Manager Selection Criteria
* Chief Information Officer (CIO) and Agency Strategic Plans

## Applicable Industry Sources

* Gartner, Inc.
* Project Management Institute

# Introduction

Explanation: This guidance comes from the Investment Technology Resource Management (TRM) Commonwealth of Virginia (COV) Program Management (PgM) Standard, which requires a Program Organizational Change Management (OCM) Plan to be created. The Program view looks across Component Projects to ensure a consistent message is conveyed regarding organizational change. The Project OCM Plans should be appendices to this plan, noting that Categories 1, 2, and 3 Component Projects require an OCM Plan and OCM Plans for Category 4 Component Projects are optional. Note that all planning steps may not apply to this Program OCM Plan.

This section includes a brief overview of the Program Organization Change Management Plan. Briefly describe the purpose and the overall goal for communicating the change strategy.

Ensure the OCM Plan depicts executive leadership strategic plan(s) for the agency to move forward with newer technology, process improvements, job enrichment, increased profitability, and increased customer service to and for the agency(ies).

The purpose of the OCM Plan includes:

* Assessing the impact of delivering the Program’s products to the user organizations and individual users.
* Assessing the readiness of the user organizations and individual users to accept changes to working environments.
* Identifying, describing, and planning for necessary actions to facilitate those changes.
* Reducing resistance to change using various communication tools.

Ensure to delete these italicized guidance blocks before publishing the final document.

**Perspective**. **Perseverance**. **Petition**. **Attitude**. **Resilience**. **Teachable**.

*These and many more positive traits are key elements to successfully changing an organization. Change can be challenging for many reasons. For some, it is the lack of control over what is changing and/or not understanding it (whether it is the technology or the decisions behind the changes), to having fear over a potential loss of a job. But if those affected by change turn the axis of their world and shift focus from the negative to the positive, change can be an effective tool to greater job satisfaction, different opportunities, and new skills. The “What’s In It For Me?” or WIIFM must be satisfied for affected employees to be willing to embark on this journey.*

*Organizational Change Management is a structured approach to shifting individuals, teams, and societies from a current state to a desired future state. OCM incorporates people, process, tools, and a number of disciplines, including, but not limited to:*

* *Psychology*
* *Cultural*
* *Organizational Design*
* *Training*
* *Human Resource Management; and*
* *Communications*

*OCM should be considered a standard Sub-Program under the Program as it involves many pieces, each of which can be its own Project.*

*At its root, OCM is focused on the “people component” of change. Along with Customer Relationship Management, OCM is successful only when the current culture and the behavior of COV employees are fully in sync with communicating excellence and added value to customers.*

*Although there are two types of change, incremental and transformational, a formal Program Organizational Change Management Plan is geared more towards transformational change. Incremental change involves small adjustments made on a continual basis – a process not geared towards “project” work. Transformational change, rather, focuses on the more dramatic/radical, large scale revolutionary and reconstructive change requiring planning, executing, closing, and evaluating effectiveness to answer the fundamental questions, “Did the change occur and did it have the desired affect?”*

# Vision

*Explanation: Document the current and future state. The future state supports the vision for the Program’s objectives and why change is necessary. Include areas such as training, process redesign, tools, position redesign, position reassignments, adding new organizational units, reporting/supervision changes, dissolving existing organizational units, etc.*

## Current “As Is” State

*Explanation: Briefly explain the current state of the organizations involved in the transformation. Identify the business and operational processes impacted by the project; those processes that provide input to the primary processes (supplier processes); or receive input from those processes (customer processes). Identify any controlling COV sections, policies, standards, guidelines, regulations, and/or procedures. Identify the knowledge, skills, and abilities required to perform the current business processes. Identify and describe the organizational structures established to perform, manage, and oversee the primary processes.*

*Include documentation such as current organizational charts, position descriptions, and Responsible, Accountable, Consult, and Inform (RACI) chart(s), and existing organizational charts, for example.*

## Future “To Be” State

*Explanation: Explain the to-be state of the organizations involved in the transformation. What is their involvement in the Program’s objectives? Steven Covey’s book,* *“Seven Habits of Highly Effective People,” states in habit #2, “Begin with the end in mind. Focus on the expected outcome.” By doing so, you will be able to focus on what has to change in order for the transformation to occur. Identify the business/operational processes needed to perform once the Program goes live. Identify the stakeholders of those end processes and their interests/roles. Identify the knowledge, skills, and abilities required to perform the future state business processes. Identify the updated or newly formed organizational structures required to perform, manage, and oversee the end-state processes. Include documentation such as forward-looking organizational charts, position descriptions, RACI charts, process flow diagrams, etc.*

# Stakeholder Management

*Explanation: It is important to identify all stakeholders for and against this Program’s implementation. By identifying who they are, what impact they have on the Program, and whether they benefit or not from the Program’s goals and objectives is important to managing perceptions, communications, and change readiness. List the key stakeholders as they relate to organizational change management. Consider making a table that includes the stakeholder name, awareness level (high, medium, low), level of support, influence (high, medium, low), and contingency plans as needed.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Key Stakeholders** | **Awareness Level (High, Medium, Low)** | **Level of Support** | **Influence (High, Medium, Low** | **Contingency Plans** |
|  |  |  |  |  |
|  |  |  |  |  |

# Organizational Change Team

*Explanation: Identify the Organizational Change Team including business process owners, end users, and human resources representative (who is primarily responsible for developing the communications strategy). Identify who will be the Change Champion (usually the Program Sponsor or designated Agency Head). A Change Champion cannot be a Program or Project Manager.*

*Identify the Program Organizational Change Manager and the Project Organizational Change Leads for each Component Project delivering a product or service. A Change Champion is instrumental in communicating the change, coaching, training, and managing resistance. Add additional rows for each Component Project Change Leader, Business Process Engineer, and End User Representative. Ensure no participant is left out.*

*Note that the Organizational Change Team may change as the Program progresses. Plan to update and expand the Organizational Change Team as the Program moves towards Implementation.*

*Consider drawing an organizational chart for the team. See the following example, which may or may not work for your Program. Edit accordingly.*



The Organizational Change Team will be commissioned to assess the organizational change impact to Human Resources, Training, policies, guidelines, and procedures. They will also be responsible for communicating to stakeholders, including end users, using the WIIFM focus.

| **Name** | **Roles** | **Responsibilities** |
| --- | --- | --- |
|  | Change Champion | Communicates the vision for organizational change. Leads by example. Is involved at all times in initiating, managing, and implementing change. Works with people and ensures the right skill sets are in place at the right time. Keeps people focused and directed towards the end goal(s). Accepts feedback willingly.  |
|  | Program Organizational Change Manager | Manages the organizational change message horizontally across the Component Projects ensuring all OCM activities are satisfactorily accomplished. Is the main point of contact from a Program Management Office perspective for organizational change, attending mandatory governance and oversight meetings as required?  |
|  | Project Change Agent | Manages the organizational change message vertically within their respective Component Project ensuring all Project-related OCM activities are satisfactorily accomplished; manages the portion of the Project Schedule containing their activities, and reports activity status. |
|  | Human Resources | Develops the Communications Strategy for conveying Program-wide organizational change regarding obtaining a new skill set, types of available training, the forums for training, etc..  |
|  | Business Process Engineer | Re-designs or creates from scratch organizational processes and procedures to support new technology implementations.  |
|  | End User Representative | Listens to and asks questions related to organizational change with an open mind. Participates in all levels of training as required, from technology familiarization to testing use-case driven scenarios. Tests redesigned and/or new organizational processes and procedures and supplies feedback.  |

# Scope

Explanation: Describe the Program Organization Change Management Plan’s scope and the phases in Program Management where organizational change is prominent. For the role of Organizational Change Program Manager, consider consulting with an outside source as this person will not be ingrained in the culture and can be as objective as possible.

## Scope Statement

Explanation: Briefly describe what effort is in-scope (e.g., training, training materials, communication plan, redesigned job descriptions, etc.) for organizational change to be effective. If applicable, indicate what is out-of-scope. The scope may also include a need to identify training facilities and establish user groups post implementation. Other specific scope items may include:

* Changes to business processes such as process re-engineering
* Critical milestones that must be met for success
* Changes to the Code of Virginia, policies, standards, and regulations
* Staffing and Leadership Analysis
* Organizational Structure Analysis and Design

## Phase Activities

Explanation: Phases are subsets of the overall Program lifecycle where OCM tasks (or activities) take place. The Program phases where OCM activity occurs are Program Initiation, Program Management Planning, Program Execution, Program Closeout, and Program Evaluation. Identify the specific organizational change activities based on scope for each phase.

Phases are subsets of the overall Program lifecycle where Organizational Change Management tasks (or activities) take place. The Program phases where OCM activity occurs are Program Initiation, Program Management Planning, Program Execution, Program Closeout, and Program Evaluation. The following diagram depicts the high-level organizational change activities associated with each program management phase. Note that these activities occur after the Program Initiation phase launches.



### Program Initiation Phase Activities

Explanation: List the Program Initiation Phase OCM activities. The following examples may or may not apply:

* Gain an understanding and well-rounded perspective of the overall Program vision.
* Host sponsor engagement sessions.
* Record initial feedback.

### Program Management Planning Phase Activities

Explanation: List the Program Management Planning Phase OCM activities. The following examples may or may not apply:

* *Identify the Organizational Change Program Manager and Organizational Change Project Change Agents who may formally report to the Organizational Change Program Manager.*
* *Identify all Organizational Readiness Team(s) necessary to manage the changes.*
* *Develop any surveys and checklists appropriate to measuring the sponsor’s success in organizational change management and to continually monitor the Program in this area.*
* *Develop a timeline schedule based on the Program’s overall timeline and baseline it.*
* *Develop the OCM Plan and obtain approval.*

### Program Execution Phase Activities

Explanation: List the Program Execution Phase OCM activities. The following examples may or may not apply:

* *Execute the Organizational Change Management Plan and monitor its effectiveness.*
* *Adjust and adapt the plan based on environmental and other factors as needed. Follow usual and customary change management procedures (refer to the Configuration and Change Management Plan).*
* *Document any decisions, risks, issues, etc. as it relates to this workflow.*
* *Update any surveys and checklists, as appropriate, based on feedback.*
* Monitor the OCM schedule.

### Program Closeout Phase Activities

Explanation: List the Program Closeout Phase OCM activities. The following examples may or may not apply:

* Document a Program Organizational Change Management Closeout Report.
* Document Lessons Learned.

### Program Implementation Review Phase Activities

Explanation: List the Program Implementation Review Phase OCM Activities. The following examples may or may not apply:

* Participate in a Post-Implementation Review.
* Document Lessons Learned.

# Readiness Strategy

Explanation: Describe the readiness strategy for ensuring a successful transformation.

## Organizational Change Communications Plan

Explanation: Everyone must be kept informed of key developments and decisions related to change. Not all relevant details in terms of how it will impact people will be known upfront. Identify the key strategic, tangible, work products that will be produced to communicate to all impacted team members and employees. As change leaders we do not want to surprise anyone as that will lead to resistance. The Program Organizational Change Manager and Project Organizational Change Agents must be aware of anything causing dissatisfaction to ensure it is properly addressed. A constant and consistent message must be conveyed at all times.

Develop guiding principles that will govern the Organizational Change Team. Examples include:

* Support those individuals who embrace the change; for they will lead all others towards the goal.
* Acknowledge any negative feelings and beliefs by documenting them for discussion and action (if any) for the Organizational Change Team. Provide feedback through various communication methods.
* Lead by example.

Also address critical success factors, key messages, targeted audience(s), stakeholder perceptions (it is recommended to keep a running log of stakeholder perceptions to document what they are and the approach taken to handle them. In this manner the “perception document” becomes a reference for consistent messaging for the Organizational Change Team/Change Champion to mimic. Document the communication management process(es), mechanisms, and measurements for effectiveness.

Example communication methods are as follows. Tailor them to suit the Program.

* *Sponsor Committee Meetings*
* *Program Management Office (PMO) Meetings*
* *Project Management Team Meetings*
* *Organizational Change Team Meetings*
* *Organizational Change Team Readiness Reviews*
* *Program Newsletter*
* *Program Website*
* *Change Agent Network*
* *Training Campaign (Pilot Training, UAT, Train-the-Trainer, Organizational Readiness Workshops, Coaching, Adult Learning Style Workshops, etc.)*
* *Knowledge Transfer*
* User Community Groups (End-User and Process Owner Groups)

Consider putting the communications information in a table with headings such as Channels, Target Audience, Content, Frequency, and Responsible Party.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Channels** | **Target Audience** | **Content** | **Frequency** | **Responsible Party** |
|  |  |  |  |  |
|  |  |  |  |  |

## Training Plan

*Explanation: Document the Program Training Plan. Identify the objectives and schedule. The training objectives will help focus training development efforts appropriately. Address the specific process of influencing directly impacted employees and team members on the Program’s intended benefits – what is in it for them?*

### Training Objectives

*Explanation: Document the expected training objectives to support the Program’s success. Consider putting the training objectives in bullet form.*

### Training Schedule

*Explanation: Document the planned training schedule to include the types of training (to include Pilot, Train-the-Trainer, Workshops, Coaching, Hands-On, or Computer/Web-based Training, as needed), facility requirements, stakeholder group(s), and dates. Consider putting this information in table form.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Type of Training** | **Facility Requirements** | **Stakeholder Group(s)** | **Dates** |
|  |  |  |  |
|  |  |  |  |
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# Metrics Collection and Action Plans

*Explanation: Document the approach and metrics to be collected when measuring change. Examples would include measuring the results of surveys, documenting issues and how many were resolved, how many students were trained, how many students needed re-training, etc. Document any action plans developed as a result of the metrics and document them in appropriate status reports. Examples follow:*

| **Performance Measure** | **Green** | **Yellow** | **Red** |
| --- | --- | --- | --- |
| Total Number of Organizations Impacted (this is the sum of transformed, added, and dissolved) | 100% of impacted organizations are where they need to be.**Action: do nothing** | Less than 100%, but more than 90% of planned organizations have been transformed.**Action: Review the plan to determine appropriateness of impacted planned organizations.** | Less than 90% of planned organizations are where they need to be.**Action: Escalate requirement to the Oversight Committee. Ensure the planned organization count is current.** |
| Total Number of Organizations Transformed | 100% of planned organizations have been transformed.**Action: do nothing** | Less than 100%, but more than 90% of planned organizations have been transformed. **Action: Review the plan to determine appropriateness of planned organizations to be transformed.** | Less than 90% of planned organizations have been transformed. **Action: Escalate requirement to the Oversight Committee. Ensure the planned organization count is current.** |
| Total Number of Organizations Added | 100% of planned organizations have been added.**Action: do nothing** | Less than 100%, but more than 90% of planned organizations have been added. **Action: Review the plan to determine appropriateness of planned organizations to be added.**  | Less than 90% of planned organizations have been added. **Action: Escalate requirement to the Oversight Committee. Ensure the planned organization count is current.**  |
| Total Number of Organizations Dissolved | 100% of planned organizations are dissolved.**Action: do nothing** | Less than 100%, but more than 75% of planned organizations are dissolved. **Action: Review the plan to determine appropriateness of planned organizations to be added.** | Less than 75% of planned organizations are dissolved.**Action: Escalate requirement to the Oversight Committee. Ensure the planned organization count is current.** |
| Total Number of Policies/Procedures Impacted (this is the summary of transformed, added, and dissolved) | 100% of impacted policies / procedures are where they need to be.**Action: do nothing** | Less than 100%, but more than 90% of impacted policies / procedures have been transformed.**Action: Review the plan to determine appropriateness of impacted planned policies / procedures.** | Less than 90% of impacted policies / procedures are where they need to be.**Action: Escalate requirement to the Oversight Committee. Ensure the planned policies / procedures count is current.** |
| Total Number of Policies / Procedures Transformed | 100% of planned policies / procedures have been transformed.**Action: do nothing** | Less than 100%, but more than 90% of planned policies / procedures have been transformed. **Action: Review the plan to determine appropriateness of impacted planned policies / procedures.** | Less than 90% of planned policies / procedures have been transformed. **Action: Escalate requirement to the Oversight Committee. Ensure the planned policies / procedures count is current.** |
| Total Number of Policies / Procedures Added | 100% of planned policies / procedures have been added.**Action: do nothing** | Less than 100%, but more than 90% of planned policies / procedures have been added. **Action: Review the plan to determine appropriateness of impacted planned policies / procedures.** | Less than 90% of planned policies / procedures have been added. **Action: Escalate requirement to the Oversight Committee. Ensure the planned policies / procedures count is current.** |
| Total Number of Policies / Procedures Dissolved | 100% of planned policies / procedures are dissolved. **Action: do nothing** | Less than 100%, but more than 75% of planned policies / procedures are dissolved. **Action: Review the plan to determine appropriateness of impacted planned policies / procedures.** | Less than 75% of planned policies / procedures are dissolved.**Action: Escalate requirement to the Oversight Committee. Ensure the planned policies / procedures count is current.** |
| * Total Number of Issues (these relate to the negativity towards change – these are the sum of the total number of issues resolved plus the total number of issues opened).
* Total Number of Issues Resolved
* Total Number of Issues Open
 | 100% of open issues were resolved. **Action: do nothing** | Less than 100% and greater than 90% of issues were resolved. **Action: Depending on the severity of the issues, create action plans to resolve them, or defer them.** | Less than 90% of issues were resolved. **Action: Depending on the severity of the issues, escalate issue to the Oversight Committee. Execute action plans.**  |
| Total Number of Processes Impacted (this is the summary of transformed, added, and dissolved) | 100% of planned impacted processes were addressed. **Action: do nothing** | Less than 100%, but more than 75% of planned impacted processes were addressed. **Action: Review the plan to determine appropriateness of impacted processes.** | Less than 75% of planned impacted processes were addressed.**Action: Escalate requirement to the Oversight Committee. Ensure the planned impacted processes count is current.** |
| Total Number of Planned Processes Transformed | 100% of planned impacted processes were transformed. **Action: do nothing** | Less than 100%, but more than 75% of planned impacted processes were transformed. **Action: Review the plan to determine appropriateness of impacted processes.** | Less than 75% of planned impacted processes were transformed.**Action: Escalate requirement to the Oversight Committee. Ensure the planned impacted processes count is current.** |
| Total Number of Planned Processes Added | 100% of planned impacted processes were added. **Action: do nothing** | Less than 100%, but more than 75% of planned impacted processes were added. **Action: Review the plan to determine appropriateness of impacted processes.** | Less than 75% of planned impacted processes were added.**Action: Escalate requirement to the Oversight Committee. Ensure the planned impacted processes count is current.** |
| Total Number of Planned Processes Dissolved | 100% of planned impacted processes were dissolved. **Action: do nothing** | Less than 100%, but more than 75% of planned impacted processes were dissolved. **Action: Review the plan to determine appropriateness of impacted processes.** | Less than 75% of planned impacted processes were dissolved.**Action: Escalate requirement to the Oversight Committee. Ensure the planned impacted processes count is current.** |
| Total Number of Staff Positions Impacted (this is the summary of transformed, added, and dissolved) | 100% of planned staff positions were addressed. **Action: do nothing** | Less than 100%, but more than 75% of planned staff positions were addressed. **Action: Review the plan to determine appropriateness of impacted staff.** | Less than 75% of planned staff positions were addressed.**Action: Escalate requirement to the Oversight Committee. Ensure the planned impacted staff count is current.** |
| Total Number of Planned Staff Positions Transformed | 100% of planned staff positions were transformed. **Action: do nothing** | Less than 100%, but more than 75% of planned staff positions were transformed. **Action: Review the plan to determine appropriateness of impacted staff.** | Less than 75% of planned staff positions were transformed.**Action: Escalate requirement to the Oversight Committee. Ensure the planned impacted processes count is staff.** |
| Total Number of Planned Staff Positions Added | 100% of planned staff positions were added. **Action: do nothing** | Less than 100%, but more than 75% of planned staff positions were added. **Action: Review the plan to determine appropriateness of impacted staff.** | Less than 75% of planned staff positions were added.**Action: Escalate requirement to the Oversight Committee. Ensure the planned impacted processes count is staff.** |
| Total Number of Planned Staff Positions Dissolved | 100% of planned staff positions were dissolved. **Action: do nothing** | Less than 100%, but more than 75% of planned staff positions were dissolved. **Action: Review the plan to determine appropriateness of impacted staff.** | Less than 75% of planned staff positions were dissolved.**Action: Escalate requirement to the Oversight Committee. Ensure the planned impacted staff count is current.** |
| Total Number of Planned Staff Enrolled in Training by Type of Training (Note: other metrics for training should be gathered from student surveys, number who pass certification exams, etc. ) | 100% of planned staff were enrolled in training. **Action: do nothing** | Less than 100%, but more than 75% of planned staff were enrolled in training. **Action: Review the plan to determine appropriateness of impacted staff.** | Less than 75% of planned staff were enrolled in training.**Action: Escalate requirement to the Oversight Committee. Ensure the planned impacted staff count is current.** |
| Total Number of Planned Staff Trained by Type of Training | 100% of planned staff trained. **Action: do nothing** | Less than 100%, but more than 75% of planned staff were trained. **Action: Review the plan to determine appropriateness of training.** | Less than 75% of planned staff were trained.**Action: Escalate requirement to staff supervisor with a further escalation plan until trained.** |
| Number of Lessons Learned associated with Change Management during the Program* Number of Lessons Learned Incorporated into Process Improvement
* Number of Lessons Learned Deferred
 | 100% of lessons learned were reviewed.**Action: do nothing** | Less than 100%, but more than 75% of lessons learned were reviewed. **Action: Schedule meetings to finalize disposition of lessons learned.** | Less than 75% of lessons learned were reviewed.**Action: Escalate requirement for review to the Sponsor; ensure Sponsor communicates the need for reviewing lessons learned.** |
| Number of Lessons Learned associated with Change Management at Post-Implementation Review* Number of Lessons Learned Incorporated into Process Improvement
* Number of Lessons Learned Deferred
 | 100% of lessons learned were reviewed.**Action: do nothing** | Less than 100%, but more than 75% of lessons learned were reviewed. **Action: Schedule meetings to finalize disposition of lessons learned.** | Less than 75% of lessons learned were reviewed.**Action: Escalate requirement for review to the Sponsor; ensure Sponsor communicates the need for reviewing lessons learned.** |

# Budget Considerations

*Explanation: Gartner recommends dedicating 15% of the Program budget to organizational change management activities. If no prior history exists regarding OCM-related expenditures in the COV, consider using the 15% as a yardstick by which to measure actual OCM activity. Consider outsourcing the Program Organizational Change Manager position, which will require procurement involvement. Include any training facility and other training-related expenses, as necessary.*

# Post Implementation Considerations

*Explanation: Document any Post Implementation Considerations. Consider monitoring user groups for issues related to implementation to support operations. Also consider supporting operations for a period of time post-go live. Any lessons learned gleaned from this experience should be documented in the Lessons Learned repository on the VITA website.*

# Approvals

Explanation: This section includes a document approval statement and a place for the approvers to sign. To add a signature block, insert another row in the table below then go to Insert > in the Text ribbon, select Signature Line > click OK > enter Signer’s name and role > check the box “Allow the signer to add comments…” > click OK.

The undersigned acknowledge they have reviewed the Program Organization Change Management Plan and agree with the approach it presents. Any changes to this document will be coordinated with and approved by the undersigned or their designated representatives.

|  |  |
| --- | --- |
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# Appendices

Use the below Program Organization Change Management Plan Change Control Log Template to build a separate document to maintain all Plan changes. Also include any Program-related acronyms in the acronym list.

## Program Organization Change Management Plan Change Control Log

*Explanation: Record the significant changes to the Program Organization Change Management Plan here cross referenced to all impacted Program-level artifacts. Document the change / version number and summary of the Program’s Organization Change Management Plan changes in the Publication Version Control table in the front of this document. Use this as a template in a separate document. Typically, the Steering Committee approves the changes.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Change / Version No.** | **Date Change Approved** | **Description** | **Impacted Supporting Document(s)** | **Supporting Document Change / Version No.** | **Approved By** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## Acronyms

*Explanation: Consider compiling in the appendices a table of terms used throughout this document that may require definition or clarification for individuals unfamiliar with the Program. Adapt the standard list below if these terms are not used in this document.*

|  |  |
| --- | --- |
| **Acronym** | **Description** |
| COV | Commonwealth of Virginia |
| ITRM | Information Technology Resource Management |
| PMO | Program Management Office |
| PgM | Program Management |
| PM | Project Management |
| PMI | Project Management Institute |
| CTP | Commonwealth Technology Portfolio |
| ITIM | Information Technology Investment Management |
| CBA | Cost-Benefit Analysis |
| ROI | Return on Investment |
| IT | Information Technology |
| PMD | Project Management Division |