

## **Change Management Board (CMB)**

**Purpose:** The CMB is comprised of Information Services (IS) Division employees who review change requests, recommend, and coordinate changes that are implemented by the IS Division. The purpose of the CMB is to provide a central coordination of changes. The CMB's review and recommendation process will facilitate forethought, careful monitoring, proper communication, and follow up evaluation. The goal is to improve the effectiveness of IS and reduce negative impact to the user community, ensure staff resources are managed efficiently, and to increase the value of Information Resources.

**Composition of CMB:** The CMB is comprised of at least two employees from the Software Development and Support Section, and two employees from the Infrastructure Technology Management section. The Security Analyst is a permanent member of the CMB, and may fill the role as one of the two employees from the Infrastructure Technology Management section. The Director of the IS Division appoints employees to the CMB. The chair of the CMB is chosen by the CMB participants.

### **CMB Administration:**

The CMB may develop and adopt internal rules and procedures as necessary. The CMB shall report to the Division Director on issues, concerns, or recommendations for improvements in the process.

**Change Requests:** The CMB is responsible for reviewing change requests forwarded to the CMB by an IS Section Manager. The Section Manager determines if the change meets the criteria for a CMB review. If the Section Manager is unsure, the Director will make the final determination.

The changes that are forwarded to the CMB for review meet one or more of the following criteria:

- A group of users will be affected by the change or will notice the change (unless the change is a baseline request such as an automated patch to a desktop, or a low-impact change to an application). A group of users is usually more than a couple of users of the hardware, software, or application. The group of users may be users within IS.
- The change is a major release to hardware, software, or an application already in place, and the major release affects a group of users.
- The change is a new implementation of hardware, software, or an application which affects a group of users.
- IS Resources outside of the requesting section may be impacted by the change.
- The Help Desk needs to be prepared for the change.

Note: Emergency changes that are implemented without CMB review must be documented on the Change Request Form so the CMB can perform a post-implementation evaluation.

Note: The CMB may request that the Section Manager, or the lead person for the change, attend the CMB meeting to explain the change request and/or answer questions about the change.

**CMB Responsibilities include, but are not limited to:**

- Review change request details to determine if the change can be cleared for implementation as is, or if changes or improvements should be made prior to implementing the change
- Determine if change management procedures are being followed (including testing)
- Analyze the change request for conflicts in IS resources
- Analyze the change request to ensure security is appropriately reviewed, and tested if needed
- Ensure the communication plan provides appropriate communication to IS Division staff and users
- Make recommendations to the Section Manager for changes or improvements to the change request. As an example, the CMB may recommend a change to the schedule due to resource conflicts.
- Communicate with management until the change is cleared for implementation
- Make recommendations on the prioritization of changes to IS Management
- Manage a calendar of changes, including recurring changes such as annual events
- Perform an evaluation after implementation of the change and provide recommendations for improvements if needed.

**CMB Chair Responsibilities include, but are not limited to:**

- Schedule CMB meetings
- Assign roles and responsibilities of CMB members
- Facilitate the review and discussion, or assign the facilitator role to a member of the CMB
- Ensure results are documented
- Ensure communication is performed
- Ensure the change calendar is maintained

**CMB Procedure for Change Requests:**

- Review Change Request
- Act on Change Request:
  - Make recommendations
  - Communicate with management until the change is cleared for implementation
  - Post the change to the change calendar and inform Section Manager
- Perform a post-implementation evaluation of the change and make recommendations for improvements if needed