ABOUT CHANGE MANAGEMENT

Purpose
HUIT, like any IT organization, has to make changes to its applications and infrastructure. Change Management reduces the risk of those changes by creating standardized methods and procedures that are effective (ensuring the necessary analysis, planning, coordination, testing and documentation to reduce risk) as well as efficient (provide the necessary benefit as quickly and simply as possible).

Objectives
• Establish a standard change management process and tool for all HUIT changes
• Ensure that approvals are aligned with risk level
• Support successful internal and external communications
• Capture metrics and lessons learned to continuously improve the Change Management process

Scope
Change Management begins when the need for the change is identified, not when it is ready to be implemented. Requesting review and approval of changes early provides for:
• Better visibility, prioritization and planning
• More realistic impact analysis and resource allocation
• Reduced delays and rework
• Improved communication

CHANGE REQUEST LIFECYCLE

Initiate
Initiate a ServiceNow Change Request ticket.

Assess
Determine change type and assess Risk as necessary

Document
Identify Services and Configuration Items potentially affected. Develop and document Implementation, Communications, Testing, and Backout plans.

Assign
Identify responsible support group and assignee.

Schedule
Schedule or propose an implementation date and time

Submit
Submit the change request for approval as necessary.

Implement
Initiate the communications plan as necessary and implement the change.

Complete
Complete the Change Request ticket and additional tasks as necessary

ABOUT CHANGE MANAGEMENT

Call Support
(617) 495-7777

Email Support
ithelp@harvard.edu

Major Incident Hotline
(617) 496-2831

ServiceNow Login
http://harvard.service-now.com

Email ITSM
itsm@harvard.edu

ServiceNow and ITSM help
http://huit.harvard.edu/itsm

SERVICE EXCELLENCE PROGRAM
Change Management Quick Reference Guide
for process participants

October 2013
MAINTENANCE WINDOWS

Regular Maintenance: 8pm Mon - 8am Tue
8pm Tue - 8am Wed
8pm Wed - 8am Thu
8pm Thu - 8am Fri
5am Sat - 12pm Sun

Major Maintenance:
Severity 3 (6-hour window): First weekend after Columbus Day
First weekend of Spring Recess
Severity 2 (12-hour window): First weekend after New Year's Day
Severity 1 (18-hour window): Second weekend in June

BUSINESS EVENTS

Change Freeze: No medium or high risk changes to critical services or major project deployments should occur during this time period. Exceptions require Senior Leadership Team (SLT) approval.

Change Freeze:
- Duration: 4 weeks
- Event Start: Monday 2 weeks prior to first week of class
- Event End: Friday 1 week after first week of class

Business Event | Duration | Event Start | Event End
---|---|---|---
Fall Term Startup | 4 weeks | Monday 2 weeks prior to first week of class | Friday 1 week after first week of class
Spring Term | 2 weeks | Monday 1 week prior to first week of class | Friday of first week of class
Summer Term Startup | 2 weeks | Monday before move-in weekend | Friday of first week of class

Heightened Sensitivity: During this time period, caution should be exercised when scheduling changes that would impact services that are considered critical to the specific business event.

Business Event | Duration | Event Start | Event End
---|---|---|---
Reading Period | ~1 week | First day of reading period | Last day of reading period
Exam Period | ~1 week | First day of exam period | Last day of exam period
Commencement | 1 week | Monday before commencement | Sunday following commencement

CHANGE TYPES

STANDARD: A pre-approved low risk, frequently occurring, routine change that follows an established implementation procedure.

NORMAL: A change that follows established review and approval workflow appropriate to its level of risk. Normal Changes are further categorized into low, medium or high risk.

EMERGENCY: A change to resolve an outage or a pending outage or to address a security or regulatory issue. Often the change is recorded after it is performed rather than before, but it is always recorded.

MAJOR: A change with sufficient institution-wide impact or risk that Senior Leadership Team sign-off and an increased lead-time for submission to the Change Advisory Board are warranted. Typically scheduled during established major maintenance windows.

LEAD TIMES & APPROVAL WORKFLOW

CHANGE TYPE | RISK | SUBMISSION LEAD TIME | INITIAL APPROVAL | SECONDARY APPROVAL
---|---|---|---|---
Standard | N/A | N/A | N/A | N/A
Normal | Low | 1 Business Day | Assignment Group Approver Service Owner Approver (Optional) | N/A
| Medium | 1 Week | Assignment Group Approver Service Owner Approver (Optional) | CAB Members (online)
| High | 2 Weeks | Assignment Group Approver Service Owner Approver | CAB Meeting
Emergency | High | N/A | Assignment Group Approver Service Owner Approver | Emergency CAB
Major | High | 6 Weeks | Assignment Group Approver Service Owner Approver | CAB Meeting Senior Leadership Team (SLT)

RISK ASSESSMENT CRITERIA

SCOPE: The number and relative importance of the services that depend on the item(s) being changed, with consideration given to timing and usage patterns, where applicable.

IMPACT: A measure of two things:
a) The degree to which services will be interrupted during implementation of the change, or may be interrupted should the change implementation fail (worst-case scenario).
b) The degree to which the user experience is changed after the change is implemented.

PROBABILITY OF SUCCESS: A measure of how well tested the change is or our history of success with similar changes.