

# State of California



## FI\$Cal Change Control Plan

**Version 4.0**

**FINAL**

**June 2013**

## Revision History

Date	Version	Last Updated By	Status/Comments	Change Approved By
6/29/07	1.0	Informatix	Initial Draft submitted for PMO initial review.	PMO
7/27/07	1.1	Informatix	Interim Plan. Incorporates PMO comments.	PMO
8/6/07	1.2	Informatix	Interim Plan. Incorporates additional PMO comments.	PMO
8/16/07	1.3	Informatix	Interim Plan. Incorporates final PMO comments.	PMO
9/7/07	1.4	Informatix	Updated cover page.	PMO
9/20/07	1.5	Informatix	Minor updates; updated Roles and Responsibilities.	PMO
10/05/07	1.6	Informatix	Incorporates various reviewer comments.	PMO
10/10/07	1.6		Steering Committee approval of version 1.6.	FI\$Cal Steering Committee
10/26/07	1.7	Informatix	Incorporates various reviewer comments and suggested edits for quarterly update throughout the plan.	PMO
06/11/08	1.8	Danny Lopez, Marie McIntyre	Quarterly Update.	PMO
08/24/08	1.8		Steering Committee approval of version 1.8.	PMO
06/17/09	1.9	FI\$Cal PMO	Detailed plan for SPR and Procurement phases.	
7/24/09	1.10	FI\$Cal PMO	Updated as result of Process Improvement Team review.	PMO
8/14/09	1.11	FI\$Cal PMO	Updated as result of Process Improvement Team walkthrough.	PMO
8/20/09	1.12	FI\$Cal PMO	Updated as result of Process Improvement Team walkthrough of the Configuration Management Plan.	PMO
9/1/2009	1.13	FI\$Cal PMO	Updates from PMO.	PMO
10/8/09	1.14	FI\$Cal PMO	Clarification of the roles of the CCB.	PMO
03/22/10	1.14	FI\$Cal PMO	Approved at the Project Level as an interim plan.	PMO
04/05/10	1.15	FI\$Cal PMO	PMO – Incorporated PMO/IV&V/IPO Feedback.	PMO
05/18/10	1.16	FI\$Cal PMO	PMO – Incorporated Process Improvement Team Feedback.	PMO

Date	Version	Last Updated By	Status/Comments	Change Approved By
05/25/10	1.17	FI\$Cal PMO	PMO – Incorporated Process Improvement Team Feedback.	PMO
06/11/10	1.18	FI\$Cal PMO	PMO – Incorporating Document Improvement Team Feedback.	PMO
06/23/10	1.19	FI\$Cal PMO	PMO – Incorporating Executive Team Feedback.	
12/23/10	2.1	FI\$Cal PMO	Version 1.8 was the last approved version of the Change Control Plan. This version will incorporate the revised governance structure that was approved by the Steering Committee on October 15, 2010 and approved in the FI\$Cal Project Charter on December 20, 2010.	PMO
1/11/11	2.1	FI\$Cal PMO	Incorporated executive team feedback and received consensus.	Project Director and Executive Team
2/2/11	2.2	FI\$Cal PMO	Incorporated CET members, changes to governance, and Change Control Process.	PMO
2/23/11	2.3	FI\$Cal PMO	Incorporated updates on change control governance.	PMO
2/24/11	2.4	FI\$Cal PMO	Incorporated additional updates on change control governance received from FI\$Cal Working Group.	PMO
3/23/11	2.5	FI\$Cal PMO	For Steering Committee Approval.	FI\$Cal Steering Committee
3/28/11	3.0	FI\$Cal PMO	For signature.	PMO
3/28/11	3.0	FI\$Cal PMO	Approved and signed by Fred Klass, Chair FI\$Cal Steering Committee.	PMO
03/1/13	3.1	FI\$Cal PMO	Revise plan to incorporate change control processes through DD&I.	PMO
03/19/13	3.1	FI\$Cal PMO	Technical Writer review.	PMO
3/19/13	3.1	FI\$Cal PMO	Peer and CET review.	PMO
3/26/13	3.1	FI\$Cal PMO	Incorporate/resolve comments.	PMO
6/11/13	4.0	FI\$Cal PMO	Approved by Steering Committee	FI\$Cal Steering Committee

## Signature Page

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### FI\$Cal Project Approval of the FI\$Cal Change Control Plan

The FI\$Cal Steering Committee, by consensus decision, approved this FI\$Cal Change Control Plan on June 11, 2013.

  
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Todd Jerue, Chair  
FI\$Cal Steering Committee

6/20/13  
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Date

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# 1. Introduction

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The FI\$Cal Change Control Plan (CCP) is a tool which serves as a sub-plan of the Financial Information System for California (FI\$Cal) Master Project Management Plan. The CCP has been developed to provide formal change control requirements for the FI\$Cal Project (hereafter referred to as the “Project”). The requirements include applying formal processes by which a change to a Configuration Item (CI) or the Project is systematically proposed, evaluated, approved or disapproved, implemented, and closed. Change control is an important process for regulating the configuration of project baselines, system baselines, configuration items, and ensuring that only approved changes are implemented. These configuration items include documents, artifacts,<sup>1</sup> products, services, and other assorted components. Change control ensures that baselines are accurate and identified throughout the Project and system life cycle.

The CCP defines the standard processes for identifying, documenting, analyzing, approving/rejecting, and implementing change requests to the Project baselines for scope, schedule, contract, and cost. The CCP describes the approach, methods, and tools used to manage change requests and to communicate the approved changes to Project staff and appropriate stakeholders.

## 1.1 Purpose

The purpose of the CCP is to define a methodology that supports the effort to balance responsiveness to the Project’s needs and changing conditions with the approved project quality, benefits, objectives, cost, and schedule commitments. The CCP supports the needs of the Project by establishing processes to identify, manage, and resolve change requests to the project baselines in a timely manner.

Change control processes ensure that standardized methods and procedures are used for efficient and prompt handling of all changes. These processes also ensure that changes which impact system development, operation, and maintenance are recorded, managed, and monitored to minimize risk exposure, and that project life cycle is not impeded by unanticipated changes.

The CCP outlines the following Change Request (CR) processes for controlling changes impacting scope, schedule, contract, and cost components of the Project:

1. Internal CR Process
2. CI Change Process
3. External Change Request (ECR) Process
4. Partner Agency CR Process

The CCP governs the activities required to initiate, evaluate, analyze, submit, track, monitor, approve, implement, report, and close changes to all CIs associated with established

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<sup>1</sup> The term “artifact” refers to tangible by-products produced during development of software for the Project, and that help describe the function, architecture, and design of the software (for example, use cases, class diagrams, test scripts, requirements, and design work products).

configuration management baselines and to the Project. Throughout the Project and during Operations and Maintenance (O&M), the change control process assists the project team in identifying and controlling any deviations from the scope initially defined and agreed to in the requirements, plans, schedule, and contracts for the Project.

## 1.2 Scope

The methodology for managing and controlling changes to project scope, schedule, cost, quality, contract, implementation approach, and CIs is established in the CCP. The CCP, in conjunction with the Change Control Desk Reference Manual (DRM), describes the roles and responsibilities related to change control, including

1. The levels of authority for approvals related to change control;
2. Definitions for the change control approach for the Project;
3. Details of the procedures to process and communicate changes; and
4. Explanations of how changes are implemented.

The FI\$Cal Configuration Management Plan and deliverable 10.01 Configuration Management Plan establish the Project's configuration management baselines and methodology for CI identification. The overall change control methodology applies to all CIs that directly relate or contribute to the development and implementation of the FI\$Cal solution, and ensures that all changes impacting baselined CIs are appropriately addressed.

Changes required to fix functions that do not work as intended or required, based on the original system purpose as defined by the Project's requirements, are considered defects and require Project CCB approval before changes are implemented. Approved changes to correct defects are tracked and managed in the Rational Quality Manager tool by the System Integrator (SI). Those corrections are managed using processes explained in the SI's deliverables and other related technical management plans. The correction of defects (for example, problems with requirements, design, development, implementation, documentation, and bad fixes) are within the scope of the SI contract and are performed by the SI without additional charge to the State. Corrective actions may trigger other changes, such as changes to the Project's schedule baseline.

Since the FI\$Cal solution approach is included in the SI Contract, the CCP, in combination with the FI\$Cal Contract Management Plan, addresses changes to the SI Contract. Changes to other state contracts (such as Independent Verification and Validation and Project Management Services support contracts) are managed by FI\$Cal's Vendor Management Office (VMO).

## 1.3 Strategy

FI\$Cal's strategy for change control is to implement a CCP that defines the policies, standards, processes, and procedures to ensure changes are made using a standardized approach across the Project. The following steps are critical to ensure change control practices are applied consistently for all changes:

1. Develop comprehensive change control processes and guidelines for effective change control practices.

2. Establish appropriate review and approval levels, which promote efficient practices.
3. Establish and implement effective and efficient change control tools and processes.
4. Establish change control communication practices between project team members and change control groups.
5. Appoint members to roles identified within the CCP to promote responsibility and accountability.
6. Train project team members with the skills required to perform effective change control practices with respect to assigned configuration items.

#### 1.4 Document Review Cycle

The CCP will be reviewed, as needed, as the Project moves through the project management life cycle. The FI\$Cal Project Management Office (PMO) reviews the plan to verify the relevance of the processes and procedures to Project business needs.

Project documentation standards and version control procedures are adhered to during the update process and the plan is under version control at all times. Specific processes and procedures for version control are provided in the FI\$Cal Document Management Plan and DRM. Changes to the CCP will be approved by the FI\$Cal Steering Committee (SC). Updated versions of the plan are published to the Project Library and all project team members are notified.

#### 1.5 References

FI\$Cal's change control practices, as contained in the CCP, are developed in accordance with state policies, standards, and guidelines. It is the policy of the Project to adhere to and implement proven change control management best practices in compliance with the following:

1. California State Administrative Manual Chapter 4800—California Technology Agency
2. California Technology Agency's California Project Management Methodology [http://www.cio.ca.gov/Government/IT\\_Policy/SIMM\\_17/](http://www.cio.ca.gov/Government/IT_Policy/SIMM_17/)
3. Project Management Institute Project Management Body of Knowledge and Practice Standard for Project Configuration Management
4. Institute of Electrical and Electronics Engineers 828 Standard for Configuration Management in Systems and Software Engineering
5. Statewide Information Management Manual Section 45—Information Technology Project Oversight Framework for high criticality projects: [http://www.cio.ca.gov/Government/IT\\_Policy/SIMM.html](http://www.cio.ca.gov/Government/IT_Policy/SIMM.html)

In addition, the following list provides the various document titles of all the sources referred to in the development of this plan:

1. FI\$Cal Change Control Plan v3.0 (approved March 28, 2011)

2. Franchise Tax Board's EDR Project: MRD001A—EDR Change Request Management Plan, Version 1.3, 05/16/2012; Form—CRMP—Impact Analysis Package Sample; Form—CRMP Work Authorization Sample; ClearQuest CR Sample
3. State Controller's Office 21st Century Project: Change Control Management Plan and Change Request Sample
4. Office of Systems Integration Best Practices

Below is a list of the various templates and tools referenced herein which directly support the change control processes:

1. FI\$Cal Project Change Request Submission Form (#1113)
2. FI\$Cal Project External Change Request Submission Form (#13532)
3. FI\$Cal Configuration Item List (#13624)
4. FI\$Cal Configuration Item Change Submission Form (#14490)

## 1.6 Integration with Other Plans

The CCP's processes are complementary to the related plans below. Each plan has its own criteria for changes that need to be governed by the change control process and each describes when to utilize the change request process. The following Project documents relate to the CCP:

1. **FI\$Cal Configuration Management Plan:** This document defines the standards, policies, processes, roles and responsibilities, tools, and approach the Project will use for identifying and controlling all project configuration items and baselines.
2. **FI\$Cal Project Charter:** This document defines the scope, objectives, and participants of the Project. The charter provides a delineation of roles and responsibilities, outlines the project objectives, and identifies the main stakeholders. The charter establishes the project governance and the authority of the project management team.
3. **FI\$Cal Governance Plan:** This document describes the specific roles and responsibilities of the Project and its stakeholders, focusing primarily on authority level and decision making structure. The plan outlines the governance structure and the levels of authority for all decisions on the design, development, and implementation of the FI\$Cal solution, as well as the escalation process within the governance structure.
4. **FI\$Cal Scope Management Plan:** This document governs the actions required to make changes to the Project application, business requirements, infrastructure, schedule, project baseline documentation, and/or project management processes.
5. **FI\$Cal Change Control DRM:** This document provides detailed procedures for executing the Project's change control processes in order to ensure that a standardized methodology is used for efficient and prompt handling of all changes to configuration items.
6. **FI\$Cal Document Management Plan:** This document provides the standards, policies, and guidelines for naming conventions, document repository tool, creation, and description of deliverable document CIs.

7. **FI\$Cal Requirement Management Plan and Requirements Management DRM:** These documents provide standards, policies, and procedures for the creation, baseline establishment, and storing of requirements within the Project's requirements management tool for all business and system requirements.
8. **FI\$Cal Schedule Management Plan and Schedule Management DRM:** These documents establish how the Project's schedules will be developed, maintained, monitored, and controlled throughout the project life cycle.
9. **FI\$Cal Quality Management Plan:** This document provides standards, policies, and guidelines for performing quality assurance responsibilities, and for conducting functional and physical configuration audits to ensure configuration management methods and processes are applied in the management of all configuration items.
10. **FI\$Cal Risk & Issue Management Plan and Risk & Issue Management DRM:** These documents provide standards, policies, guidelines, and procedures for managing, maintaining, and resolving risks and issues identified throughout the life of the Project.
11. **FI\$Cal Contract Management Plan, Procurement Management Plan, Contract Management DRM, and Procurement DRM:** These documents provide standards, policies, guidelines, and procedures for managing and maintaining the Project's contracts, deliverables, and procurements.
12. **FI\$Cal Cost Management Plan:** This document provides standards, policies, guidelines, and procedures for managing and maintaining the Project budget and expenditures.
13. **FI\$Cal Operational Decision-Making Framework:** This document provides project team members with a standard and structured approach for making and documenting project-related decisions.

## 2. Roles and Responsibilities

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The Project team is responsible for change control during the life of the Project and into the O&M of the FI\$Cal solution. The Project team is comprised of state staff, contracted staff, and stakeholders. Each member of the Project team has a role in identifying, documenting, evaluating, analyzing, submitting, and implementing change requests. Designated members comprise a Project Change Control Board (CCB) and a Change Evaluation Team (CET).

### 2.1 Project Change Control Board

The Project CCB serves as a decision-making forum for changes that impact the Project's scope, schedule, cost, quality, contract, or implementation approach, and/or are within the Project CCB's approval threshold as defined within this plan. In addition, the Project CCB makes decisions on changes to CIs where it is designated as the CI Approver in the CI List. The Project CCB evaluates CRs, supporting data, and recommendations, and renders decisions based upon the best interests of the Project and the State of California.

The Project CCB is comprised of members and participants. Project CCB members have decision-making authority delegated by their respective organizations and have the responsibility to inform their organizations of the items brought forward to the Project CCB as well as the decisions made by the Project CCB.

The Project CCB is comprised of the following five voting members who discuss CRs in order to reach a consensus decision for each CR:

1. Project Director,
2. Partner Business Executives (PBEs) for the:
  - Department of Finance (DOF)
  - Department of General Services (DGS)
  - State Controller's Office (SCO)
  - State Treasurer's Office (STO)

Project CCB participants, depending on the nature of a CR, contribute by providing input, clarifications, recommendations, and suggestions to the Project CCB members to assist in the decision-making process. The Project CCB participants are comprised of the following:

1. Project Executive
2. SI Project Director
3. Project Deputy Directors (State and SI)
4. Change Control Lead
5. CR Owner
6. Subject Matter Experts (SMEs), as appropriate

### 2.2 Change Evaluation Team

The CET is a dynamic team comprised of members, or their designees, whose purpose is to conduct impact analysis and develop recommendations for external and Partner Agency CRs

submitted to the Project by Partner Agencies or departments/agencies. SMEs are selected by the CET members, as appropriate for the change being requested, to ensure a quality analysis is conducted on all CRs. The CET is comprised of the following members:

1. Change Control Lead (CET Chair)
2. A representative from each Partner Agency (DOF, DGS, SCO, and STO) as designated by the respective PBE
3. A representative from each Project functional area as designated by each State Deputy Director
4. SI Representatives
5. Legal
6. SMEs, as appropriate

### 2.3 Roles and Responsibilities

Table 1 identifies and describes the roles and responsibilities for implementing and participating in change control activities.

Table 1: Change Control Roles and Responsibilities

ROLES	RESPONSIBILITIES
Project Steering Committee (SC)	<ol style="list-style-type: none"> <li>1. Approval of changes as described in this plan.</li> <li>2. Assist in resolving CR disputes escalated by the CCB.</li> <li>3. Review and approve CR recommendations from the CCB for changes exceeding the CCB's approved thresholds for project scope, cost, or schedule.</li> </ol>
SC Executive Working Group	<ol style="list-style-type: none"> <li>1. Review CR recommendations from the CCB.</li> <li>2. Discuss and deliberate on CR recommendations within their respective organizations.</li> <li>3. Make recommendations on CRs to the SC.</li> </ol>
Project Change Control Board (CCB)	<ol style="list-style-type: none"> <li>1. Provide resolution for CRs within the CCB's approved thresholds for project scope, cost, or schedule.</li> <li>2. Review and provide recommendations on CRs requiring SC review and approvals.</li> <li>3. Review and approve CIs designated for CCB approval.</li> <li>4. Review and approve ECRs from departments/agencies or CRs from Partner Agencies for impact analysis.</li> <li>5. Review impact analysis and recommendations from the CET for ECRs from departments/agencies or CRs from Partner Agencies.</li> <li>6. Establish project management and Enterprise Resource Planning system management baselines.</li> <li>7. Work with project team managers to facilitate the analysis and prioritization of CRs.</li> </ol>

ROLES	RESPONSIBILITIES
Change Evaluation Team (CET)	<ol style="list-style-type: none"> <li>1. Review ECRs from departments/agencies or CRs from Partner Agencies for impact analysis.</li> <li>2. Coordinate impact analysis activities that involve support from respective Partner Agency.</li> <li>3. Appoint appropriate SMEs and coordinate impact analysis for ECRs from departments/agencies or CRs from Partner Agencies with Deputy Directors as needed.</li> <li>4. Conduct impact analysis, document findings, and make recommendations on ECRs from departments and agencies or CRs from Partner Agencies for the CCB.</li> <li>5. Work with project team members to facilitate the analysis and prioritization of ECRs and CRs.</li> <li>6. Collaborate with the Exemption Workgroup during impact analysis activities for proposed exemptions, deferments, or deployment changes to wave schedule ECRs.</li> <li>7. Review and comment on CIs related to approved ECRs from departments/agencies or CRs from Partner Agencies to ensure changes are made in accordance with approved requests and project management plans.</li> <li>8. Confirm proposed ECRs from departments and agencies or CRs from Partner Agencies do not adversely affect external systems, subsystems, facilities, software, or services.</li> <li>9. Attend CET meetings as scheduled.</li> </ol>
Exemption Workgroup: Representatives from DGS, SCO, STO, and DOF	<ol style="list-style-type: none"> <li>1. Review submitted ECR requests from departments and agencies requesting to be exempt, deferred, or deployed during a different wave.</li> <li>2. Evaluate ECRs and make recommendations on ECR impact analysis requests for the CCB.</li> <li>3. Collaborate with the CET and SMEs during the impact analysis activities for exempt, deferred, or changes to wave schedule ECRs.</li> </ol>
Customer Impact Committee (CIC) Designee	<ol style="list-style-type: none"> <li>1. Participate in the CCB in an advisory capacity.</li> <li>2. Review CRs and information provided by the Change Control Lead.</li> <li>3. Coordinate impact analysis activities that involve support from respective CIC departments.</li> </ol>
Partner Business Executive (PBE)	<ol style="list-style-type: none"> <li>1. Voting member of the CCB.</li> <li>2. Review ECRs, CRs, and information provided by the Change Control Lead.</li> <li>3. Approve, reject, or escalate CRs that are within the purview of the CCB.</li> <li>4. Work with their individual agency management and leadership to ensure full vetting and sign off on CRs initiated by their respective agency.</li> <li>5. Coordinate the assessment of change impact on respective Partner Agency activities, systems, or business processes including any associated state costs.</li> </ol>

ROLES	RESPONSIBILITIES
Project Executive	<ol style="list-style-type: none"> <li>1. Participate in the CCB.</li> <li>2. Elevate CRs, ECRs, or issues to the SC.</li> <li>3. Manage projects and resources to ensure that change control principles are followed.</li> <li>4. Communicate CCB approval decisions for ECRs to impacted departments/agencies and approval decisions for Partner Agency CRs to impacted SC members.</li> </ol>
Project Director (State)	<ol style="list-style-type: none"> <li>1. Chair and voting member of the CCB.</li> <li>2. Review ECRs, CRs, and information provided by the Change Control Lead.</li> <li>3. Coordinate CCB activities with the Change Control Lead.</li> <li>4. Approve, reject, or escalate ECRs and CRs that are within the purview of the CCB.</li> <li>5. Elevate ECRs, CRs, or issues to the Project Executive.</li> <li>6. Review, comment, and approve all CIs designated for Project Director approval.</li> <li>7. Ensure quality control and quality assurance processes are performed in accordance with the FI\$Cal Quality Management Plan.</li> <li>8. Effectively engage the Project Executive and the PBEs in decision making to minimize negative impacts to state program operations while ensuring project objectives are achieved.</li> <li>9. Ensure timely communications with the Project Executive and the PBEs through the established project management processes (project management plans).</li> <li>10. Maintain and monitor the Project's work plan and performance, including performance of contractors.</li> <li>11. Coordinate with the independent verification and validation consultants and the independent project oversight consultants to address and incorporate findings and recommendations for change control.</li> <li>12. Coordinate information and issues with the PBEs when the project management processes (project management plans) do not provide an approach or resolution.</li> <li>13. Manage projects and resources to ensure that change control principles are followed.</li> </ol>
Project Director (SI)	<ol style="list-style-type: none"> <li>1. Participate in the CCB.</li> <li>2. Review ECRs, CRs, and information provided by the Change Control Lead.</li> <li>3. Review, comment, and approve all CIs designated for Project Director approval.</li> <li>4. Manage projects and resources to ensure that change control principles are followed.</li> </ol>

ROLES	RESPONSIBILITIES
<p>FI\$Cal Deputy Directors (State and SI): Administration, Business, Change Management Office (CMO), Technical, Project Management Office (PMO)</p>	<ol style="list-style-type: none"> <li>1. Participate in the CCB.</li> <li>2. Review and evaluate all ECRs and CRs to identify, review, and confirm impacts to respective functional areas.</li> <li>3. Approve CRs before they are submitted to the PMO for processing for the CCB.</li> <li>4. Work within respective functional team to facilitate the analysis and prioritization of CRs.</li> <li>5. Appoint Functional Lead(s) to maintain the CI List.</li> <li>6. Appoint CI Owners to be responsible for managing and updating their respective CIs.</li> <li>7. Participate as a SME for CIs that require change, when needed.</li> <li>8. Review and approve changes to CIs when designated as the CI Approver.</li> <li>9. Appoint representative(s) to participate on the CET.</li> <li>10. Attend CET meetings as scheduled.</li> <li>11. Review and approve CET representative impact analysis and recommendations on all ECRs and Partner Agency CRs.</li> <li>12. Review and comment on all CIs related to approved CRs, ECRs, and Partner Agency CRs.</li> <li>13. Ensure adequate resources are available for configuration management and change control activities.</li> <li>14. Manage projects and resources to ensure that change control principles are followed.</li> </ol>
<p>Change Control Lead</p>	<ol style="list-style-type: none"> <li>1. Participate in the CCB.</li> <li>2. Coordinate the participation and activities of the CCB.</li> <li>3. Implement, manage, and oversee the change control processes outlined in the CCP and the FI\$Cal Change Control DRM.</li> <li>4. Measure and report on the effectiveness of the Project's internal and external change control processes.</li> <li>5. Coordinate and facilitate CCB and CET meetings.</li> <li>6. Provide oversight for sign-off of baseline documents under version control by the appropriate approval authority.</li> <li>7. Document the disposition of all internal and external CRs reviewed by the CCB or SC.</li> <li>8. Provide feedback to CR and ECR Owners on final disposition of CRs.</li> <li>9. Coordinate ECRs from departments/agencies and CRs from Partner Agencies for impact analysis approval with the CCB.</li> <li>10. Coordinate impact analysis for approved ECRs from departments/agencies and CRs from Partner Agencies with the CET.</li> <li>11. Track and monitor the implementation of all approved CRs and ECRs.</li> <li>12. Coordinate CCB decisions for ECRs from departments/agencies and CRs from Partner Agencies with Project Executive and FI\$Cal's CMO Deputy Director.</li> </ol>

ROLES	RESPONSIBILITIES
External Change Request (ECR) Coordinator	<ol style="list-style-type: none"> <li>1. Evaluate all ECRs to ensure forms are completed correctly by departments/agencies and the Exemption Workgroup before submitting to PMO for processing.</li> <li>2. Coordinate ECR form completion with requesting departments/agencies.</li> <li>3. Submit ECRs to the Change Control Lead for processing.</li> <li>4. Evaluate the ECR type and distribute accordingly:               <ol style="list-style-type: none"> <li>a. Exempt, deferred, or wave schedule change requests are to be distributed to the Exemption Workgroup for evaluation and recommendation.</li> <li>b. ECRs that do not fall under the Exemption Workgroup's criteria will be submitted to PMO for processing.</li> </ol> </li> <li>5. Coordinate the Exemption Workgroup evaluation and recommendations with workgroup members and PMO.</li> <li>6. Participate in the CCB for all ECRs.</li> </ol>
FI\$Cal CMO Deputy Director	<ol style="list-style-type: none"> <li>1. Manage ECR resources for respective area to ensure that ECR processes and activities are followed.</li> <li>2. Appoint ECR Coordinator to process and coordinate ECRs with PMO and Exemption Workgroup.</li> <li>3. Ensure adequate resources are available for ECR process activities within respective area.</li> <li>4. Coordinate CCB decisions on all ECRs with the Project Executive and impacted departments/agencies.</li> </ol>
Change Request Owner	<ol style="list-style-type: none"> <li>1. Participate in the CCB to address questions as needed.</li> <li>2. Participate on the CET to represent CR originator.</li> <li>3. Consult with sponsoring Deputy Directors to complete CRs and coordinate appropriate SME impact analysis participation.</li> <li>4. Complete and submit CR forms to Change Control Lead.</li> <li>5. Verify that approved changes are implemented correctly.</li> </ol>
Configuration Item Owner	<ol style="list-style-type: none"> <li>1. Update baselined CIs, as outlined in the CI List, with regard to frequency, review process, and required approvals using the CI Change Form.</li> <li>2. When CI changes impact scope, schedule, cost, quality, contract, or implementation approach, complete and submit CRs for the CCB's review and approval.</li> <li>3. Submit updated CIs to the Project Librarian to re-baseline.</li> <li>4. Notify PMO Configuration Management Lead when CI updates are approved and implemented.</li> <li>5. When the CI is a Deliverable (DEL) or Deliverable Expectation Document (DED), notify VMO and the SI Contract Lead of the approved and updated CIs.</li> </ol>
Configuration Item Approver	<ol style="list-style-type: none"> <li>1. Review and approve CI Change Forms and updates to CIs as appropriate.</li> <li>2. Submit approved CI Change Forms to CI Owner and PMO Change Control Lead.</li> <li>3. Coordinate with CI Owner until CI updates are approved or rejected.</li> </ol>

<b>ROLES</b>	<b>RESPONSIBILITIES</b>
FI\$Cal Team Member (Change Originator)	<ol style="list-style-type: none"> <li>1. Discuss potential CRs with managers and leads to identify and confirm a change needs to be made.</li> <li>2. Assist the CR Owner to complete the CR Submission Form as needed.</li> </ol>
Configuration Management Lead	<ol style="list-style-type: none"> <li>1. Manage, track, and update CI baselines for approved CRs in the FI\$Cal Configuration Item List.</li> <li>2. Coordinate implementation of approved changes with the CI Owner and Change Control Lead.</li> <li>3. Conduct Physical Configuration Audits of all CIs and Project baselines.</li> </ol>

### 3. Change Control Governance Thresholds

Evaluating the impact of CRs on cost, schedule, quality, or scope is a complex and difficult exercise. Project constraints of cost, schedule, quality, and scope are interrelated (that is, changing one often impacts others). Change control governance thresholds define the appropriate authority level for each proposed change based on the degree of impact it poses to the Project if it is approved and implemented. The Change Control Lead confirms the threshold and approval level for each submitted CR.

Table 2 summarizes the change control governance thresholds, or decision-making authority levels, for CRs impacting cost, schedule, and/or scope. The thresholds are designed to enable decisions and CR dispositions for lower-impact items within the Project and to drive higher-impact decisions and CRs to the Project SC.

Table 2: Change Control Governance Thresholds

Approval	Scope	Schedule	Cost
Steering Committee	Changes Exceeding California Technology Agency (CTA)-thresholds 1/  (Scope is Expanded)	Changes Exceeding CTA - thresholds 1/	Changes Exceeding CTA - thresholds 1/
	Changes that Reduce Scope From Approved Special Project Report (SPR)  Changes to Implementation Approach	Completion Date of Key Milestones As Listed in last approved document (SPR)	Changes Requiring Budget Change Proposals or Legislative Notification
Change Control Board (CCB)	Changes to Implementation Wave Departments	Changes to SPR Key Milestones Dates as Authorized by Steering Committee	Cost Shifts of \$1 million or more go to CCB to approve 2/
	Modifications to Clarify Requirements or Scope Documents	Changes Exceeding CTA - thresholds 1/  Per last approved project document (SPR)	
Project Executive and/or Project Director	Changes to Format and Content of SI Deliverables	Changes to Executive Management Milestones	Cost Shifts Between SPR Defined Categories of less than \$1 million 2/  Cost Shifts Between Budget Allotments and Line Items and Charged Directly to FI\$Cal of less than \$1 million 2/

- 1/ Exceeding thresholds require Project SC approval prior to submittal to CTA. Thresholds are validated from last approved project document (SPR).
  
- 2/ Specific policies and processes to be described in the FI\$Cal Cost Management Plan:
  - SPR Defined Categories:
    - Personal Services—Project and Program Staff Salaries and Benefits
    - Information Technology Project Costs— Hardware Purchase, Software Purchase/License, Telecommunications, Contract Services, Data Center Services, Agency Facilities, Project and Program Other (Standard Compensation, Travel, Training)
  - Budget Allotments and Line Items:
    - Personal Services—Salaries and Benefits
    - Operating Expense and Equipment—General Expense, Printing, Communications, Postage, In-State Travel, Out-of-State Travel, Training, Facilities Ops—Rent, Facilities Ops—Other, and Information Technology

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## 4. FI\$Cal Change Control Approach

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The CCP for the Project is administered by PMO and supported by the Project Director and Project Executive. The CCP and the FI\$Cal Change Control DRM together contain processes and procedures to analyze and report the impact of each proposed change and provide a structured environment to examine the proposed changes in a disciplined manner.

This section defines the approach followed by the Project to initiate, evaluate, perform impact analysis, submit, track, monitor, obtain approvals, implement, report, and close all CRs. CRs are created to request, monitor, and track changes to the Project baseline and to evaluate the impact of proposed changes. CRs are necessary for any modification to a project baselined CI or any item that impacts scope, contract, costs, schedules, or resources. CRs must be carefully considered as they may present risks as well as benefits to the project. Knowledge of these processes and procedures is an important requirement for verifying the Project is on schedule and in compliance with the baselined SI contract.

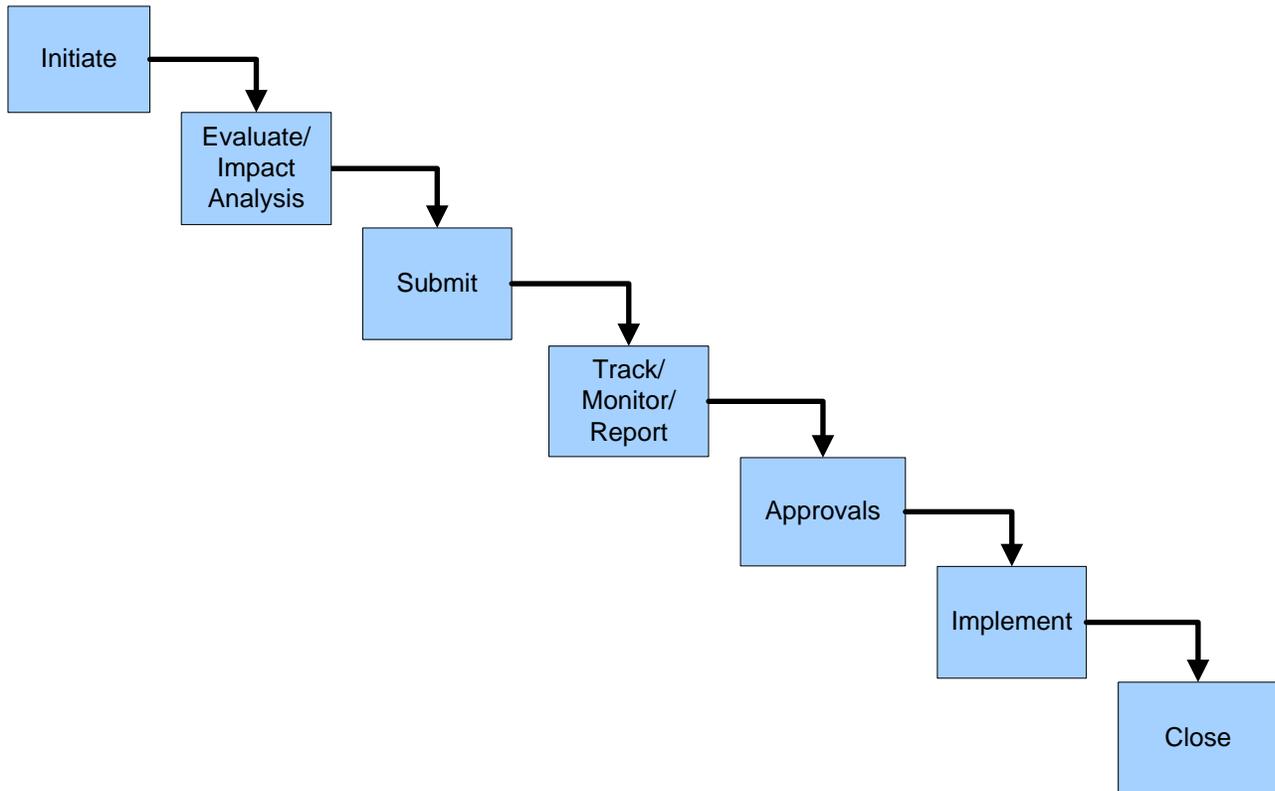
The Change Control Approach is as follows:

- **Initiate:** Once a CR
  - is identified, the CR Originator fills out the appropriate CR form and collaborates with the appropriate State and SI Deputy Directors who become the sponsors for the change. This step involves the identification of a potential change, validation of the potential change, and documentation of the potential change.
- **Evaluate:** The sponsoring Deputy Directors, Exemption Workgroup, or CI Approver evaluates the CR. This step involves reviewing the request and determining the validity of the proposed change.
- **Impact Analysis:**
  - **Internal CRs:** The sponsoring Deputy Directors collaborate and coordinate the impact analysis with impacted functional areas and SMEs. This step involves coordinating a thorough impact analysis of the proposed CR. The analysis defines and documents the business need, considers impacts to scope, schedule, cost/benefits, resources, quality, CIs, risks, and issues.
  - **Partner Agency CRs and ECRs:** Approval from the CCB must be obtained for the Project to conduct impact analysis of these CRs. Approved impact analyses for these CRs is conducted by the CET members and SMEs as appropriate.
- **Submit:** Once a change is identified, documented, evaluated, analyzed, and approved by the sponsoring Deputy Directors for submission, the CR Originator submits the appropriate CR form to the Change Control Lead for issuance of a unique ID and logging into the CR Tracking Log.
- **Track:** The Change Control Lead tracks CRs through the change control processes.
- **Monitor:** The Change Control Lead monitors the status of CRs and updates the CR Tracking Log to reflect the status for each CR on a weekly basis.

- Obtain Approvals:** CRs are processed through the established approval processes documented within this plan. CRs for CIs are routed to the State and SI Approvers for completion of the form with the approval decision.
- Implement:** Once approvals have been obtained for the CR, the Change Control Lead or CI Owner initiates the implementation of the approved change in accordance with the appropriate project management methodology. The change is implemented, tracked, and verified in accordance with the Project’s project management plans.
- Report:** The Change Control Lead provides biweekly status reports on all CRs to the Project CCB.
- Close:** After the Change Control Lead or CI Owner validates that the change has been implemented and approved by the CI Approver, the CR is closed.

The following diagram illustrates the change control process. Detailed procedures are contained in the FI\$Cal Change Control DRM.

Figure 1: Change Control Process Diagram



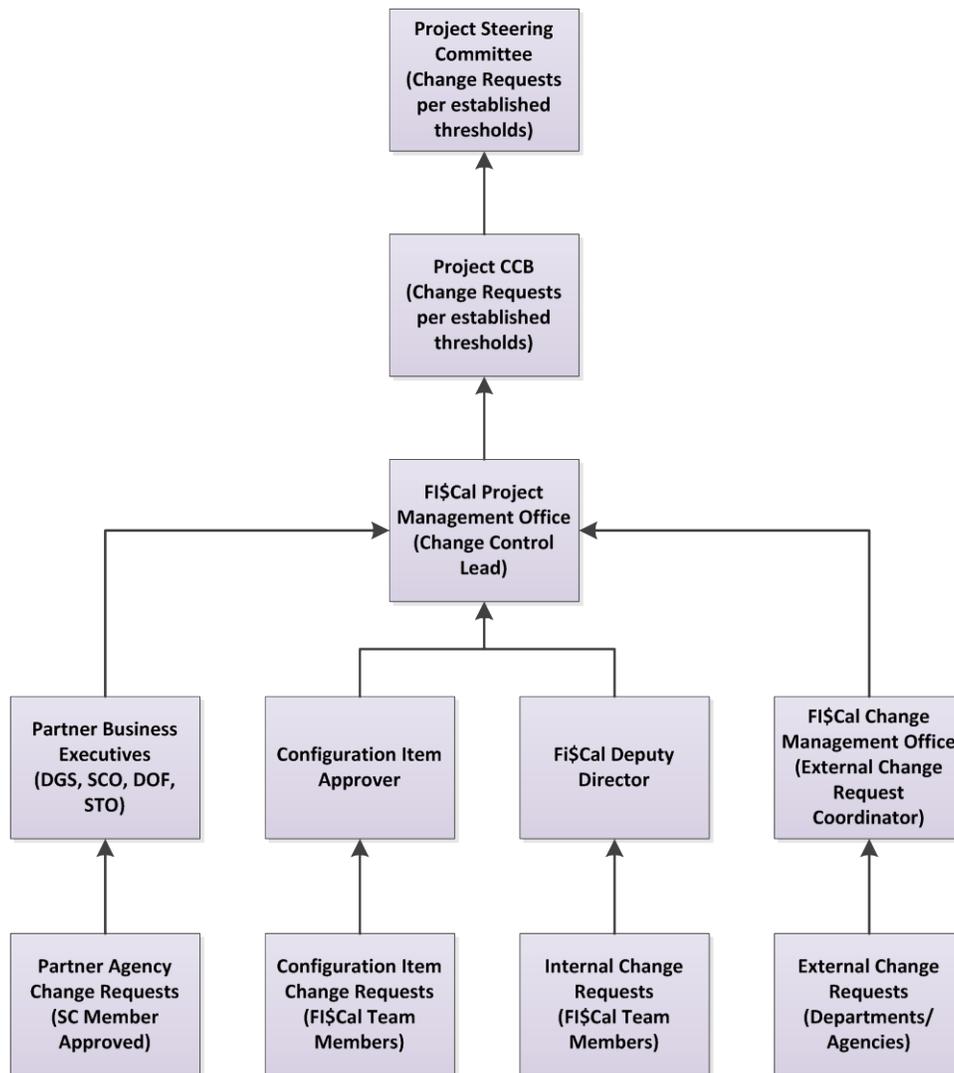
## 5. FI\$Cal Change Request Processes

This section defines the formal CR processes that will be used by the Project to modify project baselines. The Project’s matrix organization requires a CR methodology that allows efficient and effective CR submissions by internal sources, Partner Agencies, external sources, and CI owners. The Change Control Lead is responsible for managing the overall change control process and all CRs submitted for processing.

The CR processes within this section define the activities to initiate, evaluate, conduct impact analyses, submit, and obtain approvals for four distinct CR processes (internal, configuration item, external, and partner agency) defined for the Project. The FI\$Cal Change Control DRM sets forth the detailed procedures for completing the activities for each CR process, and contains detailed instructions for completing the various CR forms.

The following diagram illustrates the change request processes that will be used by the Project.

Figure 2: FI\$Cal Change Request Processes Diagram



## 5.1 Internal Change Request Process

The internal Change Request (CR) process establishes the formal change control process used for managing change requests submitted from within the Project. The CR process is administered by the PMO.

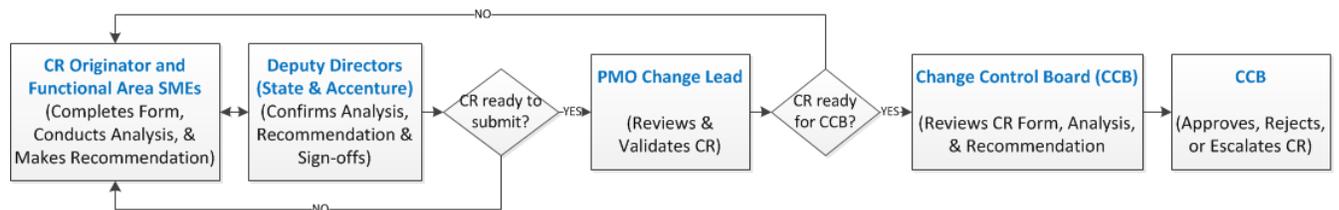
The internal CR process defines the Project’s practices for submission, evaluation, impact analysis, recommendation, and decision. A formal Project CR Submission Form is used by project team members to submit CRs that impact the Project’s cost, schedule, scope, contract, or implementation approach. The State and SI Deputy Directors are the sponsors of CRs completed by project team members in their respective functional areas, and coordinate the impact analysis with the impacted functional area Deputy Directors, and the CR submittals with the CR Owners. CRs require signature approval from both the sponsoring State and SI Deputy Directors before submission to PMO. Internal CRs will be evaluated for completeness by PMO and processed accordingly.

The internal CR process assists the Project with the management and control of changes being requested to the baseline CIs in the Project’s CI List. Examples of internal CRs include:

1. A request to change an already approved deliverable
2. A request to purchase additional software licenses
3. A request to update a project management plan.

Procedural steps for the Internal CR process and procedures are outlined in the DRM.

Figure 3: Internal Change Request Process Diagram



## 5.2 Configuration Item Change Request Process

The CI CR process manages changes to approved project artifacts that have been assigned the status of being a baselined CI. The CI CR process establishes the formal change control process used for handling changes submitted by the Project for configuration management purposes only. The CI CR process is administered by PMO.

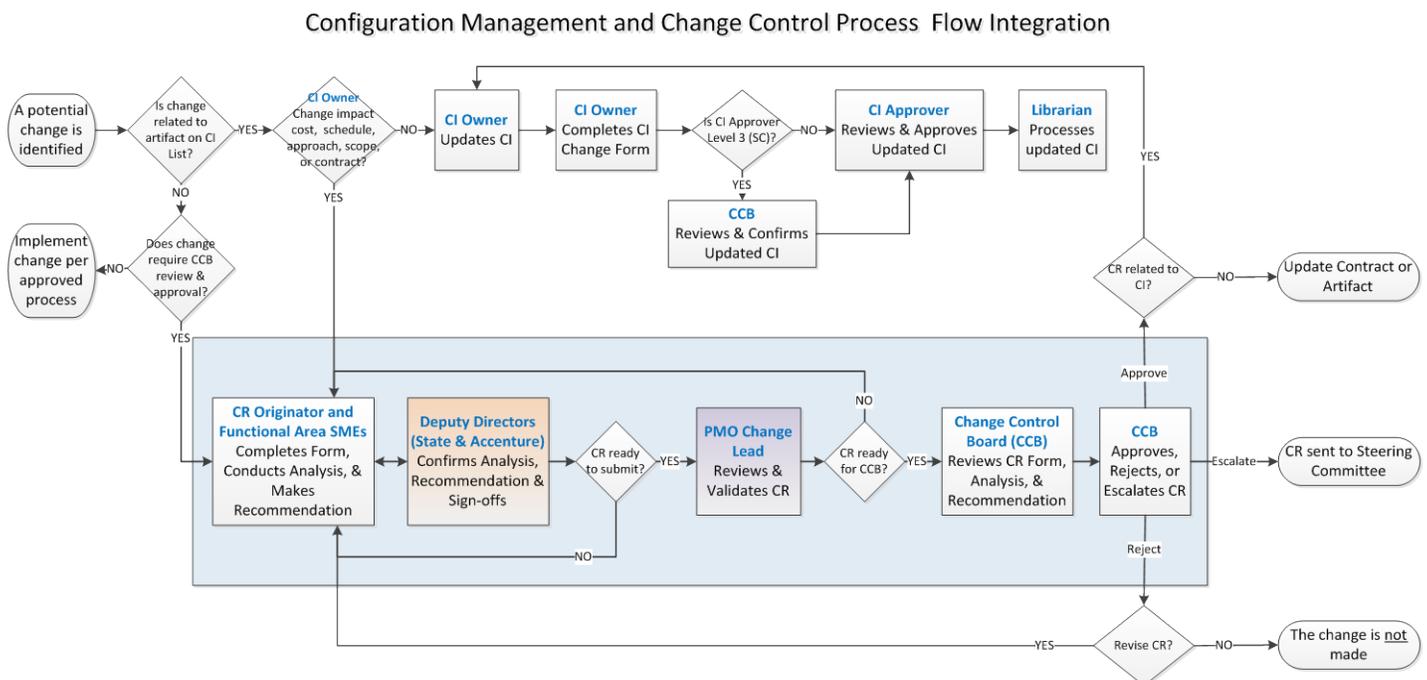
The CI CR process defines the Project’s practices for the submission, evaluation, impact analysis, recommendation, and decisions associated with changes to configuration items that do not impact the Project’s scope, schedule, cost, quality, contract, or implementation approach. A formal CI Change Form is used by Project team members to document and submit changes for configuration items. Each CI in the baselined CI List includes a designated CI Owner and Approver. The CI Owner obtains the appropriate approval from the CI Approver. The CI Approver reviews the CI CR for completeness and coordinates with the CI Owner to process the updated CIs accordingly.

The CI CR process assists the Project with the management and control of changes being requested to the baseline CIs in the Project's CI List. Examples of CI CRs include:

1. A request to change an already approved deliverable
2. A request to change a project-wide process
3. A request to update a project management plan.

Procedural steps for the CI CR process and procedures are outlined in the DRM.

Figure 4: Configuration Management and Change Control Process Flow Integration Diagram



### 5.3 External Change Request Process

The external Change Request (ECR) process establishes the formal change control process used for handling change requests submitted by departments and agencies from outside the Project. The ECR process is collaboratively administered by PMO and CMO.

The ECR process defines the Project's practices for the submission, evaluation, impact analysis, recommendation, and decisions associated with ECRs from departments/agencies. A formal ECR Form is used by departments/agencies to submit all CRs; department and agency representatives or liaisons complete an ECR form to request changes to FI\$Cal components for their respective department and agency. The CMO coordinates submittals and associated communications of ECRs with departments/agencies and the PMO. All ECRs require Department Director or Agency Secretary signature approval before they are submitted to CMO. ECRs are evaluated for completeness by the CMO ECR Coordinator and processed accordingly.

ECRs are subject to a two-step approval process. First the Project CCB reviews the ECR to approve the time and resources required to conduct the impact analysis. If approved for impact analysis, the Project CCB reviews the ECR, with completed impact analysis included, for final decision. ECRs approved or rejected through the external change control process are communicated to the CMO Deputy Director, who coordinates communications with the Project Executive to the requesting department or agency.

The ECR process assists the Project with the management and control of changes being requested to baseline CIs in the Project's CI List. Examples of ECRs include:

1. A change request for an exemption from implementing the FI\$Cal solution
2. A request for consideration to become a deferred department or agency
3. A request to switch from a department's scheduled implementation wave to another wave.

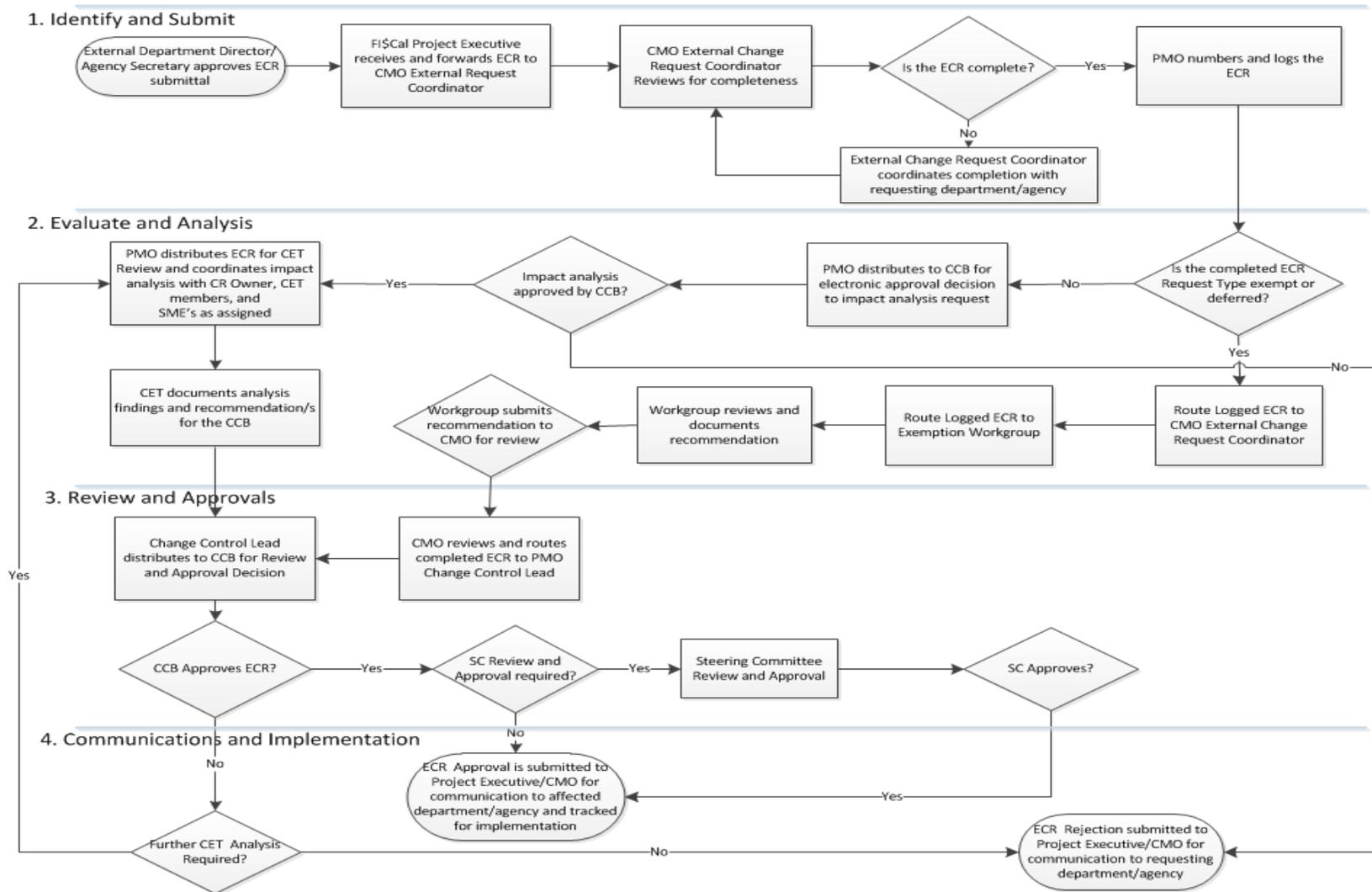
Budget Letter 08-05, Moratorium On Developing Administrative Technology Systems, announced a moratorium on developing or enhancing any departmental administrative-type information technology systems or services that duplicate the functionality of the FI\$Cal solution. Exemption requests defined within Budget Letter 08-05 must be submitted through CTA. Budget Letter 08-05 contains further information regarding this process.

Departments/agencies submitting requests to be classified as deferred are required to provide justification documenting that the request is in compliance with the Budget Letter 08-05, Moratorium on Developing Administrative Technology Systems. Departments and agencies submitting requests to be classified as an exempt department or agency are required to provide the statutory or constitutional justification exempting them from using the FI\$Cal solution.

Procedural steps for the External CR process and procedures are outlined in the DRM.

Figure 5: External Change Request Process Diagram

External Change Request Process



## 5.4 Partner Agency Change Request Process

The Partner Agency CR process establishes the formal change control process for handling change requests submitted by Partner Agencies to the Project. The Partner Agency CR process is collaboratively administered by PMO and PBEs.

The Partner Agency CR process defines the Project's practices for the submission, evaluation, impact analysis, recommendation, and decisions associated with CRs from Partner Agencies. The Project's CR Submission Form is used by Partner Agencies to submit all change requests. Partner Agency representatives or liaisons complete the CR form to request changes to FI\$Cal components for their respective agency. Each PBE coordinates submittals and associated communications of CRs with their respective Partner Agency and PMO. All Partner Agency CRs require signature approval from the appropriate Project SC Member before they are submitted to PMO. Partner Agency CRs are evaluated for completeness by PMO and processed accordingly.

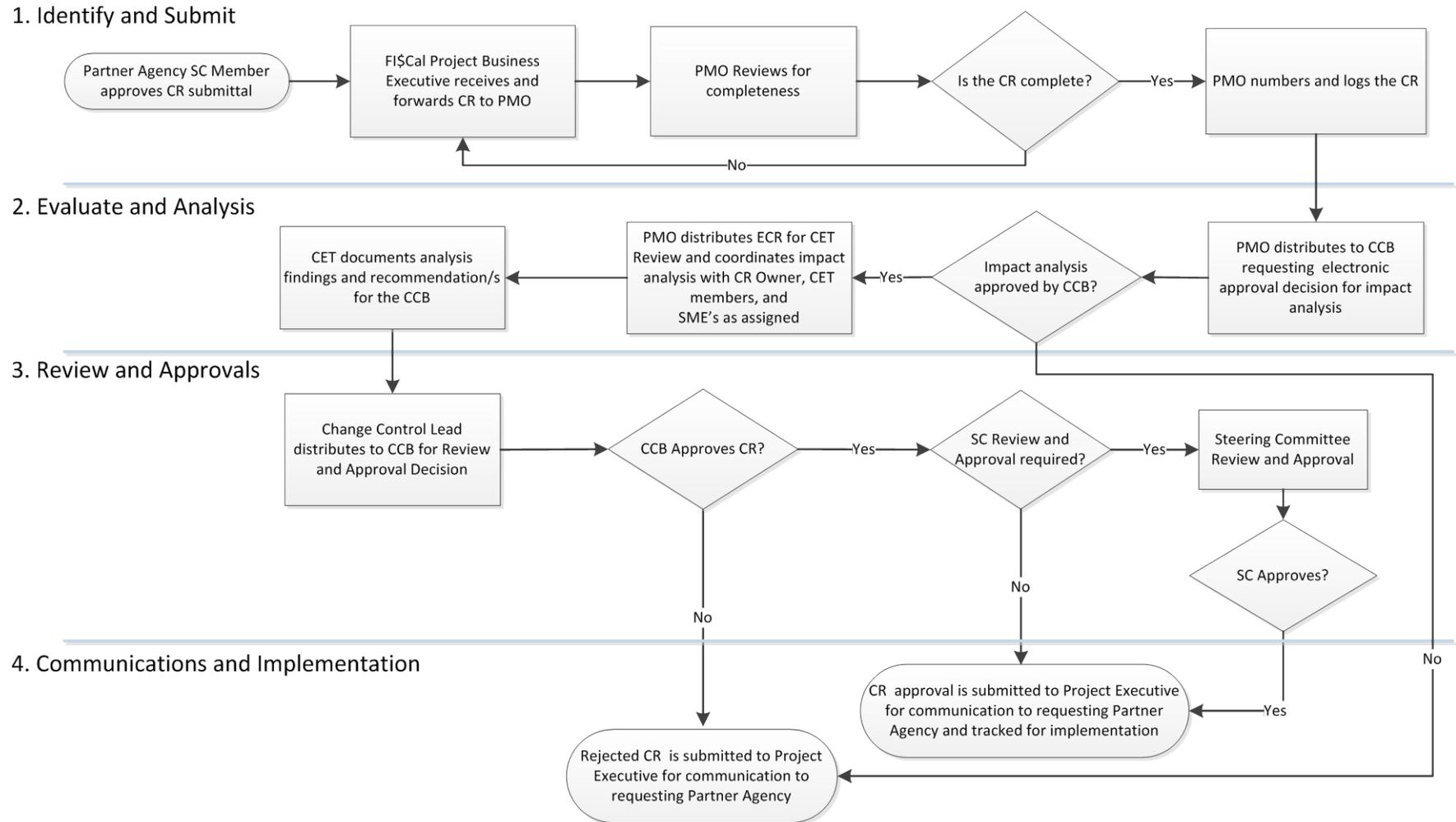
The Partner Agency CR process leverages the ECR process but uses the internal CR form rather than the ECR form. Partner Agency CRs are subject to a two-step approval process. First the Project CCB reviews the Partner Agency CR to approve the time and resources required to conduct the impact analysis. If approved for impact analysis the CCB reviews the ECR, with completed impact analysis included, for final decision. Partner Agency CRs approved or rejected through the external change control process are communicated to the Project Executive, who coordinates communications to the requesting Partner Agency Project SC member.

The Partner Agency CR process assists the Project with the management and control of changes being requested to baseline CIs in the Project's CI List. Examples of Partner Agency CRs include requests for the agency or client department to change from a deferred agency or department to FI\$Cal, or a request to change an agency or client department's scheduled implementation wave to another wave.

Procedural steps for the Partner Agency CR process and procedures are outlined in the DRM.

Figure 6: Partner Agency Change Request Process Diagram

### Partner Agency Change Request Process



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## 6. Track and Report Change Requests

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This section defines the activities needed to implement approved decisions for the formal change request processes. The implementation of approved change request decisions is performed in accordance with the corresponding management plan methodology. The implementation processes within this section define the required activities to implement approved change request decisions.

**Open:** Once a CR is submitted to the Change Control Lead all CR get an “Open” status.

**Pending:** Indicates the CR has been submitted to PMO and is pending an approval decision by the designated CR approval level (such as Deputy Director or ECR Coordinator)

**Approved for Impact Analysis:** This approved decision applies to ECRs and Partner Agency CRs. The Change Control Lead updates the status of the ECR or CR in the CR Tracking Log to “Approved for Impact Analysis.” The Change Control Lead coordinates the approved impact analysis with the CET. The Change Control Lead and CET establish timelines for the required analysis and determine the due date for the completion of the impact analysis. The Change Control Lead updates, tracks, and monitors the impact analysis due date within the CR Tracking Log.

**Approved for Implementation:** This approved decision applies to all CRs. When a CR is approved for implementation the status in the CR Tracking Log is updated to “Approved for Implementation.”

1. **Project CRs and ECRs:** The Change Control Lead updates the CR Tracking Log and communicates the approval decision to the Project CCB on all CRs and ECRs. The Change Control Lead coordinates implementation of the approved changes with the PMO Configuration Management Lead, Project Librarian, impacted CI Owners, CI Approvers, and CR Owner. The CI Owner and CR Owner have five days to implement the approved changes.
2. **CI CRs:** The CI Approver forwards the approved CI change form to the CI Owner and Change Control Lead. The CI Owner implements the approved changes and the Change Control Lead updates the CR Tracking Log. The CI Owner has five days to implement the approved changes.

**Deferred:** This decision applies to all CRs. The Project CCB, Project SC, or CI Approver may decide to defer the request and recommend one of the following actions:

1. Defer discussion to a future Project CCB meeting agenda.
2. Defer request to an alternative process.
3. Defer and assign a future date for reevaluation.

The Change Control lead updates the CR and CR Tracking Log with the deferred date and reason for the deferral. The status is updated to “Deferred.” The CR is referred back to the Project CCB or CI Approver on the documented deferred date by the Change Control Lead.

**Escalate:** If the Project CCB cannot agree on a CR decision or the CR meets or exceeds the governance thresholds to escalate, the Project CCB will vote to escalate the CR to the Project SC for a final decision.

**Rejected:** This decision applies to all CRs. If the Project CCB, Project SC, or CI Approver vote or decide to reject, the Change Control Lead updates the CR and the CR Tracking Log with the reason for rejection and closes the CR by updating the status to “Rejected” and enters the rejected date under the decision date and closed date fields.

**Withdrawn:** The Project CCB, Project SC, CI Approver, or CR Originator may determine the submitted CR is not required, is no longer a priority, or has greater impacts than benefits. Therefore, the Project CCB, Project SC, CI Approver, or CR Originator may request to withdraw the CR. The Change Control Lead withdraws and communicates the decision to withdraw to the involved contributors. The Change Control Lead updates the CR and CR Tracking Log with the reason for withdrawal and updates the status to “Withdrawn.”

**Closed:** This applies to all CRs. After approved changes have been implemented, the Change Control Lead verifies the changes have been approved and updates the CR Tracking Log status to “Closed” and enters the date the changes were approved in the closed date field. The Change Control Lead provides the CR status update to the PMO Configuration Management Lead, who updates the Project’s CI List with the new baselined date and updated status information.

### 6.1 Track Change Requests

The Change Control Lead tracks and monitors all submitted CRs within the CR Tracking Log. The CR Status will be used to track the phase of each submitted CR. The Project uses the following CR statuses to track, monitor, and report all CRs:

Table 3: Change Request Statuses

CR STATUS	DESCRIPTION
Open	Designates the PMO submission and review state for all CRs.
Pending	Indicates the CR has been logged by the PMO and is pending a decision by the designated CR approval level.
Approved for Impact Analysis	Indicates the Project CCB has voted to approved the CR for thorough impact analysis to be conducted by the CET.
Approved for Implementation	Indicates the CR has been approved for implementation by the designated approval level.
Deferred	Indicates the designated approval level has voted to defer the CR.
Escalate	Indicates the CR has been escalated to the Project SC for decision.
Rejected	Indicates the designated approval level has voted to reject the CR.
Withdrawn	Indicates the CR was been withdrawn by the Project CCB, Project SC, CI Approver or CR Originator.
Closed	Indicates the CR has been closed.

## 6.2 Monitor Change Request Effectiveness

The Change Control Lead monitors the quality of the change control approach and processes on a regular basis. CR records tracked within the CR Tracking Log and the Project document repository are reviewed and validated to ensure they are consistent with the CCP and FI\$Cal Change Control DRM.

The Change Control Lead and PMO's Governance, Risk, and Reporting Manager review the requests and processes annually, to ensure all areas of the project are submitting change requests properly. PMO considers the following:

- Is the process being followed?
  - Are proposed CRs being reviewed by leads and managers and validated appropriately before being recorded into the CR Tracking Log?
  - Are the processes documented within the plan accurate or are there other steps or dependencies that were not considered?
- Is the necessary data being captured and is it complete and accurate?
  - Are the process documents (that is, CRs, ECRs, CI CRs) being completed appropriately and in accordance with the instructions?
  - Are status updates being made on schedule, per the required deadline within the CR form, and are the updates clearly described?
- Are the CR reports useful and easy to read?
- Are the assigned resources able to keep up with the workload?
  - Are the CRs taking too long to complete?
  - Are the CRs being reviewed by the CI Approver or Project CCB being approved by the required deadline within the CR form?
  - Are the approved CRs being implemented by the required deadline within the CR form?
- How can the change control process be made more effective or less cumbersome (process improvements)?

The PMO Team reviews the results and discusses how to implement corrections or improvements. The Change Control Lead determines if the updates to the CCP, associated forms, CR Tracking Log, and/or training materials require a CR, ERC, or CI CR to incorporate corrections or improvements. The approved revised versions are stored in the Project's document repository. PMO communicates approved changes to all project team members through CMO.

## 6.3 Report Change Request Statuses and Metrics

Metrics on CRs will be kept by the PMO Change Control Lead and/or staff assigned to Change Control. The goal for collecting CR statuses and metrics is to support the analysis and reporting

of CRs and the change control process itself. The following metrics will be captured and analyzed for potential process improvements, as well as project health:

1. Number of CRs statuses (open, approved for impact analysis, approved for implementation, and the like)
2. Aging of CRs (such as days open and days under CCB review)
3. Number of new and/or closed CRs per month

Metrics will be made available to the CCB, CET, and project team members upon request to PMO, and will be discussed at the biweekly CCB meetings as needed. Biweekly reports are versioned and stored in the Project's document repository.

The PMO Quality Team conducts periodic configuration audits to the change control process to ensure the process is being followed and that metrics are being collected and analyzed in accordance with defined processes.

## Appendix A: Acronyms

The following acronyms are associated with the CCP. The purpose of this list is to provide a clear definition of the acronyms used throughout the body of the plan.

Acronym	Definition
CCB	Change Control Board
CCP	Change Control Plan
CET	Change Evaluation Team
CI	Configuration Item
CIC	Customer Impact Committee
CMO	Change Management Office
CR	Change Request
CTA	California Technology Agency
DED	Deliverable Expectation Document
DEL	Deliverable
DGS	Department of General Services
DOF	Department of Finance
ECR	External Change Request
FISCal	Financial Information System for California
O&M	Operations & Maintenance
PBE	Partner Business Executive
PMO	Project Management Office
SC	Steering Committee
SCO	State Controller's Office
SME	Subject Matter Expert
SI	System Integrator
SPR	Special Project Report
STO	State Treasurer's Office
VMO	Vendor Management Office