



Information Technology Services
ServiceNow:
Change Management Phase I
Project Charter

VERSION: 1.3 REVISION DATE: 9/28/2011

Approval of the Project Charter indicates an understanding of the purpose and content described in this deliverable. By signing this deliverable, each individual agrees work should be initiated on this project and necessary resources should be committed as described herein.

Approver Name	Title	Signature	Date
Opinder Bawa	Chief Technology Officer, ITS		
Joe Bengfort	Chief Information Officer, Medical Center		
James Hong	Deputy Director, Product & Portfolio Management	James Hong	9/15/2011
Rebecca Nguyen	ITSM Product Manager	Rebecca Nguyen	9/14/2011

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Section 1. Project Overview

1.1 Project Description

In accordance with the Chancellor's Operational Excellence (OE) Initiative, "Service Management" is one of the core technologies identified to be implemented across the UCSF Enterprise. The primary goal of this initiative is to reduce costs, improve service, and increase the process efficiency of Information Technology at UCSF.

ServiceNow is the chosen platform; it offers a comprehensive suite of cloud-based services for enterprise IT management. ServiceNow supports all common ITIL processes including incident, problem, change, request fulfillment, service level management and others.

The ServiceNow Change Management Phase I project will focus on rolling out the Change Management Application and Enterprise Change Management Process to a pilot group consisting of Campus ITS, Medical Center IT, and the School of Medicine ISU.

After the pilot group has used the new Change Application and Enterprise Process over a period of one to three months, recommendations can be made for application enhancements and process improvements. The Change Management Phase II project will consist of evaluating and determining which of the pilot group's recommendations to implement, as well as integrating other departments (ex. Apex, Department of Surgery, etc.) into the new application and process. The phase II project will be documented in a separate charter, schedule and timeline.

1.2 Project Goals and Objectives

The Change Management Process aims to improve and maintain service quality by providing a structured approach to managing and implementing changes within the department. To achieve this, the department must conduct standardized methods and procedures that include coordinating, scheduling, reporting and monitoring of departmental changes. The process must review achievements based on customer expectations and take steps to improve or modify changes and the process accordingly.

Today, the Change Management Process is conducted in organizational silos (ex. ITS changes are not coordinated with the MC IT). The implementation of an enterprise Change Management Process would promote collaboration and reduce the impact of change-related incidents and downtime.

The Service Management solution will be designed to meet the needs of the Enterprise. The project will achieve the following goals:

- Develop a variety of models to address the most commonly occurring type of change.
- Institute an efficient approval structure covering the business, technical and financial aspects of the change.
- Set criteria to distinguish a genuine Request for Change (RFC) from a Service Request.

- Incorporate a robust reporting process to provide key performance indicators to help facilitate continuous improvement.
- Identify Roles and Responsibilities (ex. Process Owner, Change Manager, Change Coordinators, etc.)
- Collaboratively implement and configure a single instance of ServiceNow to address the needs of the enterprise Change Management Process.
- Support common practices while accommodating unique operational needs.
- Create a scalable design that supports future enhancements and the specialized needs of Campus and Medical Center.

1.3 Project Scope

- Developing an enterprise change management process that includes Campus ITS, Medical Center IT and School of Medicine ISU.
- Defining an enterprise process for managing changes that involves the following aspects of the department infrastructure:
 - Database
 - Hardware
 - Communications Equipment and Software Database
 - Application Software
 - System Software
 - Data Center Environmental Systems
 - Infrastructure Management
 - Environmental Systems
 - Data/Information Repositories
 - Documentation and procedures associated with the running, support and maintenance of production systems
- Creating reports and change-related dashboards to monitor key performance indicators of the Change Management Process
- Determining change workflow for basic approvals and change tasks
- Defining change categorization and change-related fields related to: Routine, Emergency, and Comprehensive changes
- Identify notifications, including:
 - Change-related filters and modules
 - Change roles and access controls
 - Change reports and scheduled reports
- Identify relationship of Change Management to other applications (ex. Incident Management)
- Migrating Campus ITS SDLC functionally from Remedy to ServiceNow to allow Campus ITS to migrate off Remedy completely.

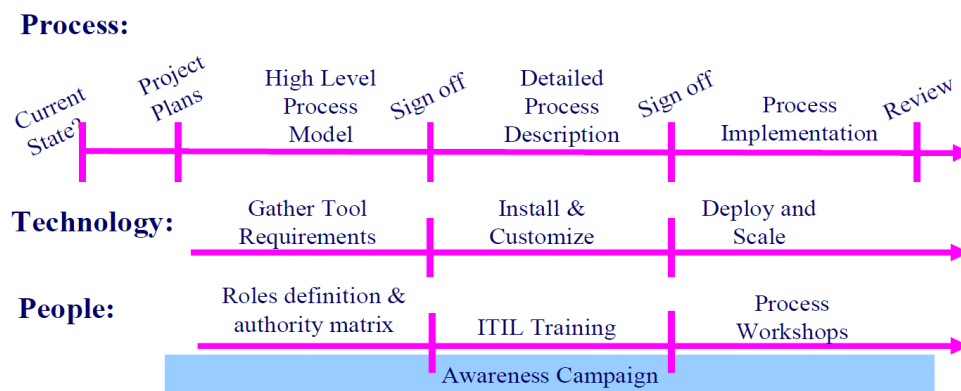
Out of Scope for this project includes:

- Rolling out Change Management to other departments in the Enterprise will be part of Change Management Phase II.
- Developing an Enterprise Release and SDLC process. This will be part of the Release and SDLC project, scheduled to begin in February 2012.
- Developing a complete Configuration Management Database. Currently, this project only covers configuration items (CI) from the Service or Application Layer. The CIs are not defined within the System, Logical Host or Physical Host layers. This will be part of the Configuration Management Project, scheduled to begin in January 2012.

1.5 Project Approach

The project teams will follow a standardized and scalable approach for implementing ITIL processes. This model is focused on the creation of a core process design team and the identification of a larger group of stakeholders involved in review, feedback and signoff activities. A typical project plan includes staged milestones and project activities, which consider the requirements and dependence of process, people, and technology.

The diagram below provides a high level project model which demonstrates the integration and sequence of activities for a typical process implementation project.



1.6 Critical Success Factors

CSF 1

Change owners are identifiable. Roles and responsibilities are clearly defined.

CSF 2

Planned changes are visible across the enterprise. Affected stakeholders are aware of upcoming changes and service impacts.

CSF 3

Key performance indicators are measurable. Reports and dashboards are available for monitoring the change process.

CSF 4

The Change Management Process can be easily adopted by any Campus or Medical Center department.

CSF 5

The ServiceNow Change Management Application enforces the Enterprise Change Management process, but is scalable and agile to allow for on-going process improvements and application enhancements that support the specialized needs of Campus and Medical Center.

1.7 Assumptions

In order to identify and estimate the required tasks and timing for the projects, certain assumptions and premises need to be made. Based on the current knowledge today, the project assumptions are listed below. If an assumption is invalidated at a later date, then the activities and estimates in the project plan will be adjusted accordingly.

- Campus OE budgeted funds and Medical Center will cover the costs incurred to achieve project scope
- Stakeholders will continue to provide a high level of project support
- All IT departments will utilize an enterprise Change Management process, focused on IT best practices.
- Terminology is clearly defined and understood (Incident, Problem, Change)
- ITIL v3 framework will be used for developing our processes
- All affected work units understand and enforce the policy and procedures of the new system
- Data migration will not be done (Remedy and other Change Control systems will be used in parallel with ServiceNow to close out existing open tickets.)
- Project Managers and Subject Matter Experts who are involved in developing the Enterprise Change Management Process are expected to have, at the minimum, ITIL Foundation training.
- Process Owners are expected to have Practitioner level training in the ITIL processes they are assigned to.
- Staff will be provided ITIL Overview training.

1.8 Constraints

- Limited to Campus OE and Medical Center budgets.
- Limited resources since ServiceNow Phase I project is concurrently running and internal resources must be shared.
- Aggressive timeline for the project. ITS go-live is November 15, 2011 and Medical Center and SOM, ISU go live is January 31, 2012.

Section 2. Project Authority and Milestones

2.1 Funding Authority

This project will be funded by the Campus Information Technology Services (ITS) and Medical Center Information Technology (IT). The budget is managed by the ITSM Product Manager with oversight and authorization from the Executive Sponsors.

2.2 Estimated Cost

Description	Estimated Cost
Navigis Business Analyst Services (40 hours)	\$7,000.00
Navigis ServiceNow Development Support (120 hours)	\$21,000.00
Project Manager / Business Analyst (50% for five months)	\$31,000
ITIL Foundation Training for Process Owner and SMEs (5)	\$7,500
ITIL Practitioner: Release, Control & Validation (3)	\$9,000
ITIL Awareness Overview Self-Paced Online (100)	\$10,000

2.3 Project Oversight Authority

The ServiceNow Change Management Project supports the Chancellor's Operational Excellence program. The project is supported by Executive sponsorship from Campus ITS department and Medical Center IT. The Project Manager reports weekly statuses to the Executive Sponsors, Key Stakeholders, and ITSM Product Manager. The project's business analysts, project manager, development team, and test team report to the ITSM Product Manager.

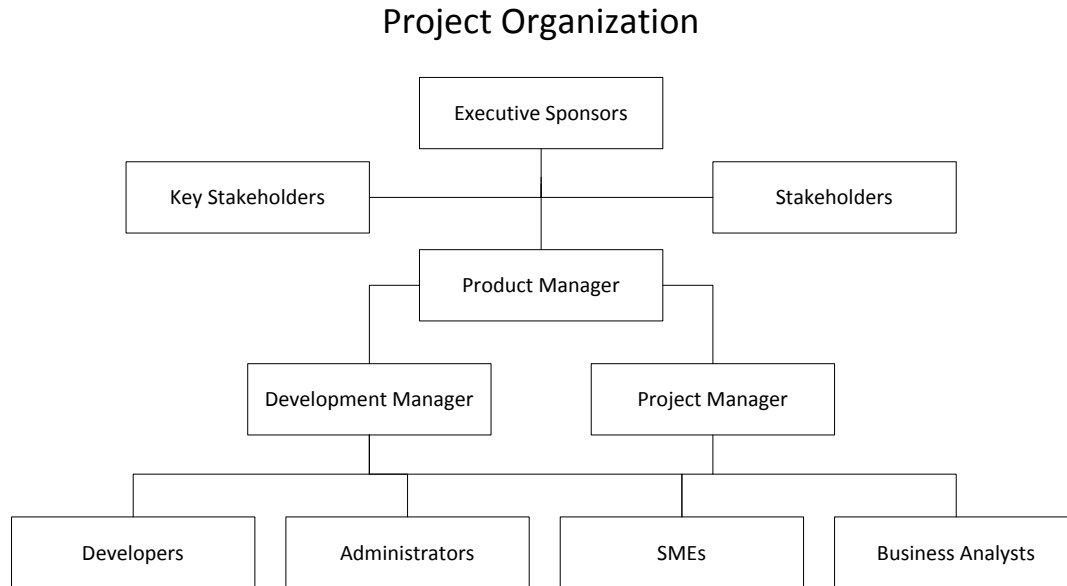
2.4 Major Project Milestones

Below is a list of significant milestones for the Change Management project.

Milestone/Deliverable	Planned Completion Date
Functional Requirements Completed & Approved	September 14, 2011
Project Charter Approved	September 16, 2011
Enterprise Change Management Process & Procedures Approved	September 23, 2011
Development Completed	October 7, 2011
UAT Completed	October 28, 2011
ITS Training Completed	November 14, 2011
Change Management Go-live for ITS	November 15, 2011
Medical Center and SOM Training Completed	January 30, 2012
Change Management Go-live for Medical Center and SOM	January 31, 2012

Section 3. Project Organization

3.1 Project Structure



3.2 Roles and Responsibilities

Role	Name	Responsibility
Executive Sponsors	Joe Bengfort Opinder Bawa	The Sponsor will provide the Executive Leadership, priority and commitment to the project, its goals and objectives. The Sponsor assures appropriate resources, funding and the final decision on issues that may need resolution by the project team.
Key Stakeholders	Julie Cox Darlena Torres Jane Wong	The Key Stakeholder will work with the Product Manager in providing Department priorities and domain knowledge. The Key Stakeholders will review, concur and participate in milestone review briefings and work with the Product Manager in voicing concerns or issues impacting the success of the projects.
Stakeholders	IT Directors	The Stakeholders will work with the Product Manager in voicing concerns or issues impacting the success of the projects.
Product Manager	Rebecca Nguyen	The Product Manager is the liaison to the Project Sponsor and Project Stakeholders, and is responsible for facilitating and organizing the project roadmap, managing the team work activities, and resolving issues raised by the Project Manager.
Project Manager	Francine Sneddon	The Project Manager develops and maintains the project plan (resourcing, implementation, work plans, etc.), monitor project progress, and ensures projects are completed on time and within budget.

Role	Name	Responsibility
Development Manager	Ed Martin	The Development Manager oversees the Developers, ensures optimal, accurate, and timely technical solutions to requirements and requests. In addition, is a technical liaison with other departments, coordinating information systems across the Enterprise.
Developers	Jason Lin Navigis	The Developers will ensure technical quality of the systems and products, control system development and operation during implementation, provide input into the project plans for work completed status, produce all technical project deliverables, documentation and design specifications, and ensure technical issues are resolved.
Administrators	Shawn Hall Peter Stampfer	Administrators maintain knowledge of how the system operates and are responsible for establishing processes and enforcing policies such as user access (accounts). In addition to monitoring and supporting the system, they contribute to user training, communication, troubleshooting, and enhancing the overall user experience.
SMEs	Laura Biachini Lynn Bosworth Chris Orsine Mimi Sosa Sean Schluntz Peter Stampfer Additional SMEs will be identified	Subject Matter Experts (SMEs) have expertise in a particular area of the product for their business unit. The SME is a resource often involved in reviewing and validating changes to the system and guiding/teaching users.
Business Analysts	David Hosea Rebecca Nguyen Francine Sneddon Navigis	Business Analysts analyze, interpret, and document business rules and requirements for technical systems. In addition, they assist in integration and user acceptance testing, support the development of training material, participate in the implementation of systems, and provide post-implementation support.

Section 4. Points of Contact

Primary Contact	Name/Title/Organization	Phone	Email
Francine Sneddon	Project Manager, IT PMO	415-476-2967	Francine.Sneddon@ucsf.edu
Secondary Contact	Name/Title/Organization	Phone	Email
Rebecca Nguyen	ITSM Product Manager	415-476-6748	Rebecca.Nguyen@ucsf.edu
James Hong	Deputy Director, IT PMO	415-476-2938	James.Hong2@ucsf.edu

Section 5. Glossary

ITIL – Information Technology Infrastructure Library

ITS – Information Technology Services

ITSM – Information Technology Service Management

MC IT – Medical Center Information Technology

OE – Operational Excellence

SOM ISU – School of Medicine Information Services Unit

Section 6. Revision History

Version	Date	Name	Description
1.0	9/8/2011	Rebecca Nguyen	Draft of Charter for review and approval
1.1	9/12/2011	Francine Sneddon	Revisions
1.2	9/19/2011	Francine Sneddon	Added J. Bengfort addition to the Goal and CSF 5.
1.3	9/28/2011	Rebecca Nguyen	Broke out Change Management into two phases. Added assumptions regarding ITIL training. Added additional items to estimated cost to capture ITIL training costs.

Section 7. Appendices (Available Upon Request)

- ITS Application Change Management Process
- ITS Change Management CAB Process
- Technical Services Change Management and Service Delivery Process