Change Management Policy

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Classification	PUBLIC

Overview

This change management policy intends to ensure that changes made to application code and relevant systems are subject to necessary and appropriate controls. Its purpose is threefold: it attempts to mitigate unexpected side-effects, the introduction of defects, and other negative effects of changes through due review; it increases awareness of changes across relevant teams; and it provides a record of changes made to systems and repositories in its scope, where possible.

Applicability

The applicability of this statement falls under purview of the Security Documentation Overview.

Purpose

The purpose of the Change Management Policy is to ensure that a standard set of minimum requirements are established for changes that are made to production systems and supporting infrastructure across the organization.

Scope

Changes, in the context of this policy, are defined as modifications to the production environment and include supporting infrastructure and key corporate systems.

This policy applies to:

- any application code or code used in the administration of the applicable environments
- any changes that will impact applicable code or environments

Roles & Responsibilities

Role	Responsibility
Change Requestor	Responsible for following change management procedures in a way that aligns with this policy, including: providing all required information and preliminary assessment of risk, impact and testing requirements.
Change Reviewer / SME	Responsible for reviewing the requested change, ensuring it is well formed, complete and accurate. Responsible for Approving / Rejecting changes.
Change Advisory Board / Change Authority	Responsible for managing exceptions, emergency changes and escalations Responsible for advising on the effectiveness of the change process and continuous improvement

Separation of Duties

No employee can be both the Requestor and Reviewer of a singular Change Request.

Types of Changes

Change Request

A Change Request is the standard method of requesting any change to a system or environment.

Change Requests must go through a review and approval process to ensure risk and impact is appropriately assessed, all applicable protocols are followed and a roll-back plan is in place, if applicable

Change Notification

A Change Notification is a pre-approved Change Request that is considered low risk and repeatable.

Implementations of this policy must define and document specific criteria and procedures for classifying changes as notifications vs change requests

Emergency Change

An Emergency Change is a change that bypasses standard Change Request process in order to address an imminent system failure or incident.

Emergency Changes may be only be authorized by the Production Change Authority. The Change Request process must be completed retroactively for all Emergency Changes promptly upon resolution of the emergency circumstances.

Change Lifecycle

Request Change

Implementations of this policy must define specific criteria for well formed and complete.

Minimum requirements include:

- Reason for change
- Description / scope of change
- Impacted assets
- Stakeholders
- Risk level
- Test requirements
- Roll-back plan
- Schedule

Review & Approve Change

Change Reviewers must ensure that all the required elements of the Change Request are complete, accurate and appropriate. Change Reviewers may request additional information or request modifications until the Change Request meets their approval specifications.

Implement Change

Change implementations and post-deployment outcomes must be documented and linked to the approved change request.

Post-implementation Review

Post-implementations reviews are required whenever changes result in deviations from expected outcomes and must be documented.

Continual Improvement

Periodically, this policy shall be reviewed to assess its effectiveness and to consider optimizations.

Additional Information

Additional information related to *Disciplinary Actions*, *Exceptions* and *Questions* can be found in the Security Documentation Overview.

Supporting Procedures

PeopleFluent Hosting Change Management (PHCM) Process

Document control

This policy is only controlled in its live, digital format. Any other format or export of this policy is an uncontrolled version of this document

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Version History

Date	Author(s)	Version	Changes

Feb 25, 2025	@Art Machado @Paul Gordon @angelina.kilmer	2.0	Annual review
Nov 01, 2024	@angelina.kilmer	1.4	Changed Policy classification from Confidential to Public
Mar 12, 2024	@Art Machado , @Sarah Zwicker (Unlicensed) , @Paul Gordon	1.3	Annual review and updated links
Jan 11, 2024	@Sarah Zwicker (Unlicensed)	1.2	Added “SME” to description for Change Reviewer.
Nov 2, 2023	@Art Machado @Sarah Zwicker (Unlicensed)	1.1	Updated links
Oct 31, 2023	@Art Machado @Sarah Zwicker (Unlicensed)	1.0	Original policy