✓ ChecklistGuro

Energy Project Change Management Checklist Template

Initiation & Scope Definition

Assess the initial need for a change and define its scope.

Change Request Description

Write something...

Change Urgency

☐ High

☐ Medium

☐ Low

Estimated Impact Score (1-10)

Enter a number...

Date of Change Request

Enter date...

Initiating Department

☐ Engineering

☐ Operations

☐ Project Management

☐ Commercial

Reason for Change

Write something...

Impact Assessment

Evaluate the potential impact of the change on project timelines, budget, resources, and stakeholders.

Estimated Cost Increase

Enter a number...

Estimated Schedule Delay (Days)

Enter a number...

Impact on Project Scope

☐ No Impact

☐ Minor Expansion

☐ Moderate Expansion

☐ Significant Expansion

☐ Scope Reduction

Description of Potential Risks

Write something...

Impact on Quality

- [ ] No Impact
- [ ] Slightly Negative
- [ ] Moderate Negative
- [ ] Significant Negative

Affected Project Areas

- [ ] Engineering
- [ ] Procurement
- [ ] Construction
- [ ] Commissioning
- [ ] Regulatory

Risk Identification & Mitigation

Identify potential risks associated with the change and outline mitigation strategies.

Describe Potential Risks Associated with the Change

Write something...

Estimated Probability of Risk Occurrence (0-10)

Enter a number...

Estimated Impact of Risk (1-10)

Enter a number...

Detailed Mitigation Strategy

Write something...

Risk Owner

☐ Project Manager

☐ Engineering Lead

☐ Operations Lead

☐ Safety Manager

Mitigation Completion Date

Enter date...

Risk Category

☐ Technical

☐ Financial

☐ Schedule

☐ Safety

☐ Environmental

Related Project Documents

☐ Risk Register

☐ Change Request

☐ Project Plan

☐ Safety Data Sheet

Approval & Authorization

Document approval levels and signatures required for change implementation.

Change Approval Level Required

☐ Level 1

☐ Level 2

☐ Level 3

Requester Name

Write something...

Request Date

Enter date...

Requester Signature

Approver Name (Level 1)

Write something...

Approval Date (Level 1)

Enter date...

Approver Signature (Level 1)

Approver Name (Level 2 - if applicable)

Write something...

Approval Date (Level 2 - if applicable)

Enter date...

Implementation Planning

Develop a detailed plan for implementing the change, including tasks, responsibilities, and timelines.

Planned Start Date

Enter date...

Planned Completion Date

Enter date...

Estimated Duration

Estimated Effort (Hours)

Enter a number...

Tasks Involved (Select All)

- ☐ Design Modification
- ☐ Procurement
- ☐ Fabrication
- ☐ Installation
- ☐ Testing
- ☐ Commissioning

Implementation Approach

- ☐ Phased Implementation
- ☐ Big Bang Implementation
- ☐ Parallel Implementation

Detailed Implementation Steps

Write something...

Resource Allocation

Confirm availability of required resources (personnel, equipment, materials).

Estimated Labor Hours

Enter a number...

Required Equipment Units

Enter a number...

Specialized Personnel Needed?

☐ Yes

☐ No

Required Skills/Expertise

☐ Electrical Engineering

☐ Mechanical Engineering

☐ Project Management

☐ Environmental Compliance

Resource Availability Start Date

Enter date...

Communication & Stakeholder Management

Outline communication plan to keep stakeholders informed about the change.

Communication Plan Summary

Write something...

Primary Communication Method

☐ Email

☐ Meeting

☐ Report

☐ Dashboard

Stakeholders to Inform

☐ Project Team

☐ Management

☐ Clients

☐ Regulatory Bodies

Next Communication Date

Enter date...

Communication Owner

Write something...

Supporting Communication Documents

⬆ Upload File

Implementation & Execution

Monitor progress against the implementation plan and address any deviations.

Planned Start Date

Enter date...

Planned Start Time

Estimated Completion % (Initial)

Enter a number...

Brief Execution Notes (Initial)

Write something...

Current Status

- [ ] Not Started
- [ ] In Progress
- [ ] On Hold
- [ ] Completed

Supporting Documentation (e.g., Photos)

⬆ Upload File

Verification & Testing

Verify the change has been implemented correctly and meets requirements.

Verification Method

- ☐ Functional Testing
- ☐ Regression Testing
- ☐ User Acceptance Testing (UAT)
- ☐ Performance Testing

Number of Test Cases Passed

Enter a number...

Total Number of Test Cases Executed

Enter a number...

Test Results Summary

Write something...

Verification Date

Enter date...

Verification Time

Verification Signature

Documentation & Closure

Update project documentation to reflect the change and formally close the change management process.

Summary of Changes Implemented

Write something...

Date of Change Implementation

Enter date...

Time of Change Implementation

Project Manager Signature

Change Request Status

- [ ] Closed
- [ ] Verified
- [ ] Completed

Total Hours Spent on Change

Enter a number...

Supporting Documentation (e.g., revised drawings)

⬆ Upload File