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Integrated Business Statistics Program (IBSP)

Change Management Overview

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IBSP Change Management

Definition

- Change Management is a structured approach to identifying, evaluating, planning and integrating changes.

Background

- **Change Management process existed for the United Enterprise Statistics Program (UES; 1998-2013)**
 - 30 Annual Survey Programs involving multiple partner divisions
 - Regular Meetings
 - Used Paper Forms requiring final sign-off (no electronic tool)
- **Integrated Business Statistics Program (IBSP: 2014-)**
 - Almost 100 Survey Programs
 - Multiple divisions (ESD, CPRD, OID, BSMD, BRD, ADD, Subject Matter Divisions)
 - Continuous collection, processing, release throughout the calendar year.
 - Monitors production activities using Integrated Schedule
 - Use JIRA as Change Management tracking tool.

The IBSP Change Management Process

◎ **Scope**

- All IBSP surveys
- All components of GSBPM to varying degrees.
- Changes and Corrections
- Growing scope as IBSP grows

◎ **Communication**

- Bi-weekly meetings with all Partners and Stakeholders, and clients (SMA divisions, BSMD, BR, TAX, CPRD, OID, QDRC and ESD); Chaired by Change Management Coordinator from ESD
- Use of electronic software tool (JIRA) instead of paper forms

◎ **Structure, Governance, and Membership**

- Change Management unit within separate section in ESD
- All partners and clients are members of Change Management
- Clear Governance and Escalation Process

Responsibilities...

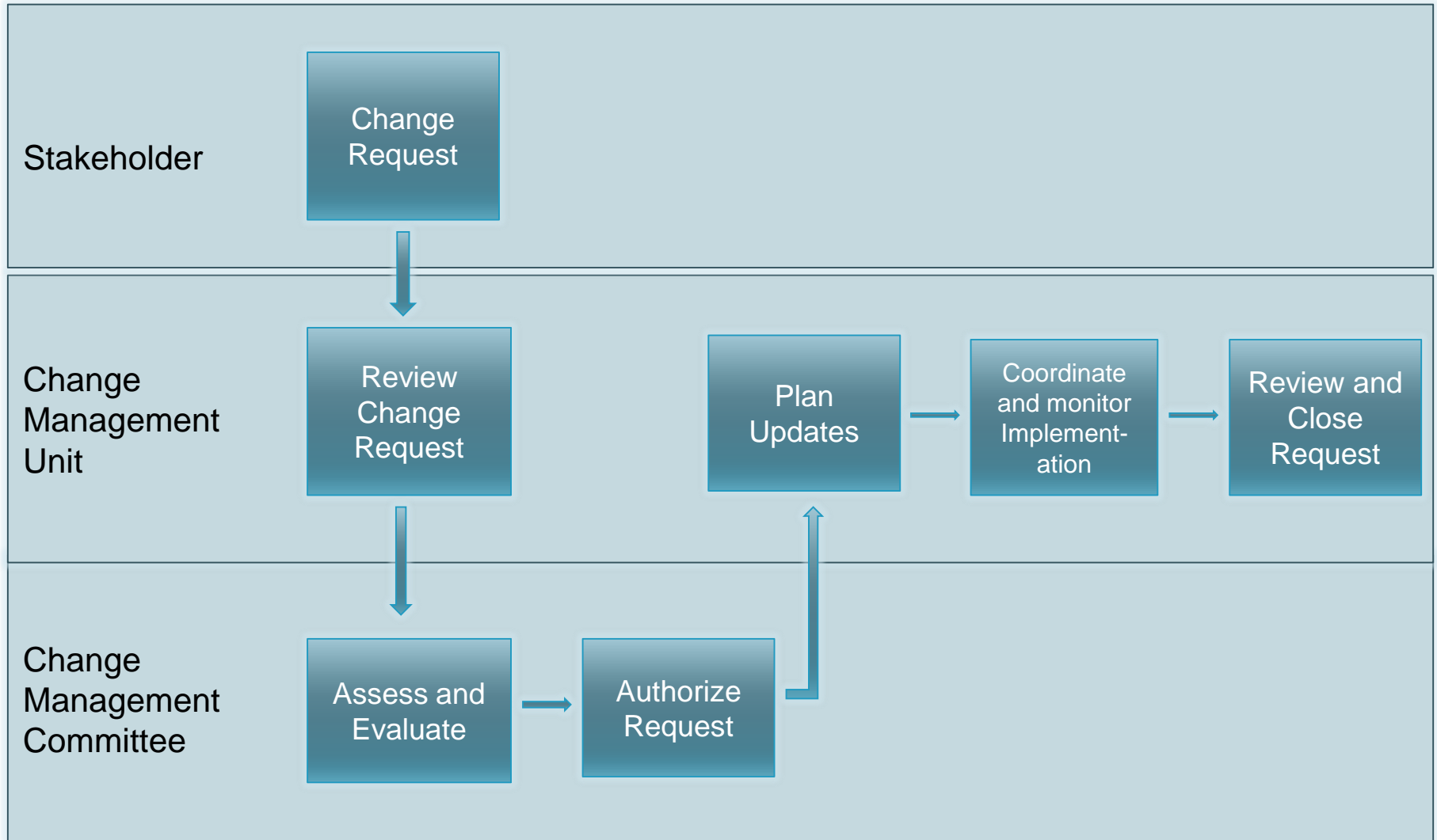
Change Management Unit

- Manage and monitor the Change Management Process by reviewing and expediting Change Requests.
- Ensure the right level of discussion, decision and arbitration on a Change Requests affecting the IBSP.
- Ensure that communication is transparent and all relevant parties have signed-off a change and an agreed timeline for implementation.
- Coordinate and monitor the implementation of a change request.
- Close a change request

Change Management Committee

- Chaired by the Change Management Unit and includes partners, stakeholders and clients
- Assess and evaluate the impact if any, of a change request on their area of service or subject matter domain.
- Quantify this impact in terms of effort, time and resources.
- Communicate the requested changes and their impact back to their respective programs and divisions.
- Provide an update of any changes from their programs that could impact the IBSP.
- Authorize change requests and implement by consensus

IBSP Change Management Process



Life Cycle of a Change Request

All change requests must be documented formally through the JIRA tool although discussions can be initiated and decisions taken at any level.

1. Submission of a Change Request

Discussions can be initiated at any level but all Change Requests must be submitted in a JIRA ticket.

2. Evaluation of a Change Request

All stakeholders have an opportunity to evaluate a request; thorough evaluation of impacts and implications are discussed at Change Management meetings, additional meetings, or through comments in JIRA; progress is always recorded in the JIRA ticket; consensus is sought and a request is recommended for approval or rejected.

3. Decision on a Change Request

A change request can be accepted, rejected or deferred until a later cycle; all stakeholders and impacted parties must be in agreement of the decision. If consensus cannot be reached, it will be escalated up through the governance structure.

4. Implementation of a Change Request

The time frame and plan of action to implement a change request must be agreed upon by all stakeholders and impacted parties.

5. Close Out of a Change Request

All changes will be followed though and monitored before the JIRA ticket can be closed.

JIRA Tool

JIRA is a corporate project management tool for managing change.

Project Structure – based on Reference Time Period (eg. DPMO-IBSP RY2014)

Component Structure – based on Survey Programs and Business Process

Roles and Responsibility – Administrator, Component Leads, Stakeholders, Assignees, Watchers

Routing Process – JIRA ticket created, assigned, routed for comments and discussion, resolved or deferred, closed (can be reopened at a later date.)

Key Information

1. Details Tab : Summary, Description, Justification, Impact, Due Date
2. Analysis Tab: Attach Document (as required)
3. Stakeholders Tab: Assign Stakeholders (as required)
4. Priorities: Blocker, Critical, Major, Minor, Trivial

- **JIRA Demo**

Benefits and Keys for Success

Benefits

- ⦿ Overall improvement in the management of planning and priorities
- ⦿ Higher transparency, communication and documentation of changes
- ⦿ Develops a proactive versus reactive environment
- ⦿ Improved quality assurance and promotes general best practice
- ⦿ Improved communication and broadening of knowledge across divisions and at all levels
- ⦿ Shared decision making with partners and stakeholders based on thorough evaluation and understanding of issues
- ⦿ Changes are implemented with minimal or acceptable levels of risk

Keys for Success

- ⦿ Clear governance and escalation structure
- ⦿ Continuous support of senior management
- ⦿ Immediate and efficient communication process and tools
- ⦿ Designated resource unit for change management

Opportunities and Challenges – the IBSP Experience

- ⦿ There is generally good will to investigate and resolve issues and implement proposed changes.
- ⦿ In the first few production cycles of IBSP, most issues were content, prescription issues, now we are moving into a wider variety of changes.
- ⦿ Issues are resolved fairly quickly and changes for upcoming cycles discussed well in advance.
- ⦿ Issues unresolved are monitored regularly and/or deferred to the next cycle.
- ⦿ The transition to JIRA as a change management tool has significantly improved the efficiency of communication; individuals are now more comfortable using this forum for discussion.
- ⦿ Regular Post-Mortems ensures feedback for improvement as IBSP progresses with new clients (size of meeting, representation at meetings, decision making authority, roles and responsibility).