

# Checklist

## IM Policy Instruments Guideline

Use the below to support your understanding and implementation of the guidance provided in the GuideBook: IM Policy Instruments Guideline.

### Review Existing Policy Instruments

- Review materials within organization
- Review materials published by OCIO
- Consult with IM Advisory Services (OCIO)
- Consult with other stakeholders

### Identify or Define Policy Instruments

- Identify internal policy templates and the business owner; create new ones only if they do not already exist
- Adopt a consistent terminology that includes the organization's common language
- Create materials that provide utility

### Identify or Define the Review and Approval Process

- Identify the review and approval processes; create new ones only if they do not already exist
- Communicate stakeholder roles and responsibilities
- Document the governance process

### Create an IM Policy Instrument Inventory

- Create an inventory that will support monitoring and verifying activities
- Leverage the OCIO provided template and example

### Identify or Create Templates

- Identify templates for all policy instrument types; create new ones only if they do not already exist
- Consult internally to verify if there are existing requirements
- Leverage the OCIO provided template and example

### Identify and Prioritize Requirements

- Identify policy instruments that require updating
- Identify policy instruments that require development
- Leverage the OCIO provided template and example
- Prioritize the requirements
- Incorporate requirements into the IM Program Plan

### Develop New and Update Existing Instruments

- Review related types of work and consult with OCIO
- Using the approved templates draft new or update existing materials and follow an approval process
- Publish and Communicate

### Review Cycle, Monitor and Verify

- assign responsibility for lifecycle management of the IM policy instruments
- review and validate compliance, performance and capacity