

Checklist

IM Education and Awareness Plan Guideline

Use the below to support your understanding and implementation of the guidance provided in the GuideBook: IM Education and Awareness for Employees.

Understanding an IM Education and Awareness Plan

- Review definitions and concepts
 - Analysis and Development
 - Education
 - Awareness

Define Roles and Responsibilities

- Identify what is driving IM including the business, legal, regulatory and other compliance requirements as well as identify how the IM Program must align.

Identify Education and Awareness Requirements

- Identifying the needs for education and awareness is the first step in developing a plan.

Identify Communication Platforms and Tools

- Education and awareness relies on communication platforms and tools that best support the content that needs to be delivered to employees. A platform is the location or mechanism used for the delivery of education or awareness materials.

Annual Planning

- An IM Education and Awareness Plan will identify and coordinate activities, support the metrics gathering and reporting needed to demonstrate increased IM capacity, and provide the direction needed to focus on specific initiatives. It is likely that one or more planning sessions with identified stakeholders will be required to complete this plan.

Monitor and Verify

- Review and validate education and awareness compliance, performance and capacity.