**IM Education and Awareness Plan**

Department or other Public Body of X, Y & Z

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Note:

Forward questions and/or comments related to this document to XXXX@xxxx.xx

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# Overview

Introduction Paragraph and a place to describe the components of your IM Education and Awareness Plan. Ensure to add how the plan will be monitored and verified.

Remember: IM needs to be aligned with the requirements of the department or other public body and with external suppliers and stakeholders in order to best support the organization. This is usually done by aligning and harmonizing the IM Program Plan with the organization’s strategic / business plan, strategic HR plan, Business Continuity Plan and other similar plans and undertakings.

What is included in this document and who is the audience?

Include background information that has an impact on the planned activities for this year. This may include and overview of where IM Education and Awareness is to date. At the outset, findings from the IM Assessments (e.g., IM Capacity Assessment Tool (IMCAT), IM Self-Assessment Tool (IMSAT), IM Check-Up, etc.) may provide a synopsis. Use reports and metrics from previous years as a basis.

# IM Education and Awareness Plan

## Objectives

[Identify the objectives]

What are the objectives of IM education and awareness? These objectives can be used to identify priority areas and to evaluate the effectiveness of the program. Use the IM Program Plan as a base and then identify any other known requirements.

Consider what area of focus you would like to highlight

## Stakeholder Analysis

[Complete a stakeholder analysis]

The stakeholder analysis identifies all parties that can affect or will be impacted by the Education and Awareness Plan. Leverage information from the overall IM Program Plan. The below stakeholder analysis is provided as a sample. Modify the table to meet organizational requirements.

**Stakeholder**

Identify individuals or groups that influence or are impacted by the initiative.

**Description**

Provides detail on the stakeholder including their purpose and how they are engaged in the education and awareness of the initiative.

**Role**

Identifies the role the stakeholder plays in the education and awareness of the initiative.

**Stakeholder Analysis**

| Organization-level Role | Stakeholder Name/Contact | Role in Education/Awareness |
| --- | --- | --- |
| Delete any stakeholders from the list that do not apply.  Add stakeholders as per organizational requirements.  Define additional roles as required. | e.g. Job Title, Jane Doe, 729-XXXX | Identify how this person or group needs to be involved, when, etc. May include:   * Inform * Review/Approve * Develop materials * Validate content for compliance with organizational standards |
| Executive responsible for organization’s IM Program | (Deputy Minister, Chief Executive Officer, Assistant Deputy Minister, Vice President or equivalent) |  |
| Director responsible for IM |  |  |
| Manager responsible for IM |  |  |
| Other staff responsible for IM |  |  |
| Internal Communications Coordinator |  |  |
| Senior Leadership Team |  |  |
| Extended Management Team |  |  |
| The role responsible for Organizational Development |  |  |
| Indivduals (employees and others working on behalf of the organization) |  |  |
| Centre for Learning and Development |  |  |
| Treasury Board Secretariat Representative |  |  |
| OCIO – IM Advisory Services |  |  |

## Standard Approach

[Identify the standard approach]

Identify how different types of education and awareness requirements will be handled. Consider existing organizational protocols, past experiences, geographic restrictions, etc. Defining a standard approach will make it easier to deal with new business as it appears and will ensure consistency in the way information is processed.

* Standard approach to developing education and awareness within the department or other public body; and
* Standard approach (if any) to disseminating new government-wide policies, standards, directives, guidelines, etc.

## Organizational Requirements

[Establish the organizational requirements]

Based on the earlier analysis, provide a prioritized list of the education and awareness needs along with where they are seen as a priority. Focus on IM risks and gaps for the organization, new IM policy instruments and create materials to support key messages.

Consider the below table as an example of a prioritized listing.

|  |  |
| --- | --- |
| Priority | Item |
| 1 | Increase employee understanding of IM principles and overall IM responsibilities |
| 2 | Support employee understanding and implementation of Transitory Records Assessment |
| 3 | Increase the management of government records in approved records repositories (document management software) |
| 4 | Increase employee understanding of cyber security principles and best practices |
| 5 | Increase employee understanding of email management |

## Planned Activities

[Create a list a of planned activities]

Identify the activities planned for this year based on priorities, objectives, etc. Include activities, sequence, resources and target dates, etc. Leverage already coordinately activities such as IM Month and Cyber Security Month campaigns issued by OCIO.

Consider the user experience of individuals working on behalf on the organization when assessing the delivery mechanism for your communication materials. For example:

* Multi-office organization
* Remote work force
* Full time vs contractual
* Employee turnover
* Identified requests
* On-demand, In-Person and/or Online training
* Add additional activities as identified in requirements list.

Consider the below table as an example of a prioritized listing.

**Planned Activities**

| Activity | Lead Resource(s) | Target Date | Comments |
| --- | --- | --- | --- |
| Intranet Updates on priority topics  (Quarterly) | IM Analyst  IM Director  Departmental Communications | January / April / July / October | IM Analyst to draft materials  IM Director to review/approve |
| Distribute IM@Work info via email to all employees | IM Director  Deputy Minister | April  (IM Month) | IM Director to draft memo from DM encouraging employees to complete course  DM to send memo to all employees |
| Online, In-person and On-demand Training:  New IM Orientation Package | IM Analyst | April  (IM Month) | IM Analyst to draft materials  IM Director to review/approve and deliver  ADM to approve |
| Declutter Challenge | IM Analyst | April  (IM Month) | IM Analyst to draft materials  IM Director to review/approve  ADM to approve |
| Online & In-person Training:  Assessing Transitory Records (Management Team) | IM Analyst | May | Request training sessions from OCIO’s IM Advisory Services for Management staff |
| Online Materials  (Intranet and Email Messages) |  | June - August | Create a number of key messages that can be distributed electronically durign the summer. |
| New Information Protection Materials | IM Analyst  Departmental Communications | September | IM Analyst to draft materials  IM Director to review/approve  Departmental communications to review and submit change request |
| OCIO’s Cyber Sercurity Campaign | IP@OCIO | October |  |
| Email Management Tips |  | November |  |
| Online, In-person and On-demand Training:  New IM Orientation Package | IM Analyst | December | IM Analyst to draft materials  IM Director to review/approve and deliver  ADM to approve |
| Records Management Training |  | Ongoing | Coordinate records management training for employees and administrators. |
| Online Training:  How to classify using the new departmental classification plan | IM Analyst | TBD | IM Analyst to draft materials  IM Director to review/approve |

## Reporting and Metrics

[Add reporting requirements and metrics]

In this section, include:

* The department or other public body’s requirements for the tracking of activities.
* Outline how the overall IM Program will gather metrics related to the success of the Education and Awareness Program (e.g. surveys to gage IM awareness, interview with employees, etc.).
* The metrics established before and after the initiation of education and awareness.
* How the information will be reported, when and to whom.