



# **M365 COP**

# **TERMS OF REFERENCE**

## **RIMPA GLOBAL**

RECORDS AND INFORMATION MANAGEMENT  
PRACTITIONERS ALLIANCE

Advancing and Connecting the Records and Information  
Management Profession.

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## 1 Document Control

VERSION	DATE	AUTHORS	APPROVAL	COMMENTS
0.1	01 Feb 2026	C Hartman	Ambassadors	
1.0	24 <sup>th</sup> March 2026	A Cornish	Approval	

## 2 Effective Date, Review, and Amendments

The Terms of Reference (**ToR**) is effective from 01 February 2026 and is reviewed every two years.

This ToR may be amended, varied, or modified by the Records and Information Management Practitioners Alliance Global (RIMPA Global) CEO.

## 3 Purpose of Terms of Reference

The purpose of this terms of reference is to document the establishment, objectives responsibilities, authority and operations of the M365 Community of Practice (CoP).

## 4 Purpose of M365 CoP

The M365 CoP will help information managers increase their knowledge, their confidence, and provide practical solutions to today’s M365 problems. The CoP will tackle governance, business and technical problems at a collective industry level, creating resources and efficiencies for practitioners.

Information managers are under-equipped in relation to M365, either as an EDRMS or as an area that stores business information. Many information managers are not confident or capable to govern or design M365 effectively. M365 implementation can be ‘owned’ by ICT departments who have little or no knowledge of how to design a system for records governance and/or compliance.

Information managers can be told to support a new environment or technology and try to maintain the integrity of the information management profession and minimum management requirements, but don't have the experience, knowledge or confidence to advocate for best outcomes. They need help to start the journey or take a next step.

Many people cannot convert training outcomes to business change without business context or further support. At training, they are learning the skills but return to their organisation and don't recognise the environment, don't see the exact functionality, or have limited access. They need help to use their learnings in their environment to progress using M365 as an EDRMS and to enable efficient and effective management of information throughout the organisation.

We need practitioners to consider how historical records management practices need to be adapted or reworked for M365. This includes how records are created and registered, how to achieve the goals of a BCS, how to manage meaningful aggregations, and how to manage retention and disposal.

There are many practitioners who are experimenting with M365 based practice but little industry-level collective action. This means that while there is excellent work being done adapting practice to M365 and solving the inevitable feature and function problems, it is mostly being done in isolation. There is little learning from others' failures, or innovative problem-solving.

Some problems are unsolvable, there are features that Microsoft need to add, or functionality that needs to be added by a Microsoft partner. We can do better at getting gaps reduced using a collective approach – either to Microsoft, or to a partner. We will also contribute to the industry if we have a reference library of problems that have been solved so that practitioners can focus on effective implementations and new problems.

## 5: Objectives

The objectives of the M365 CoP's are to:

- develop participants skills
- Discuss and where practical solve problems
- share knowledge
- build relationships and networks.

## 5 Term of CoP Members

There is no minimum of maximum term for the members of the CoP.

## 6 Objectives

The objectives of the CoP are to:

- build professional capability and expertise in M365
- foster collaboration and networking
- share best practices and lessons learned in M365.

The purpose of the CoP is to create confident IM practitioners who can participate in developing M365 as a compliant and effective information management system.

The scope of the COP for 24 months is to embed effective governance within M365, not create innovations. The COP should build confidence in practitioners, not help build technical solutions that improve an existing environment.

## 7 Authority

The CEO authorises the CoP, within the scope of its objectives, to perform activities to undertake the purpose of the group.

The CoP or the members have no decision-making power.

## 8 Organisation

### 8.1 Participation

The CoP participation number is unlimited, but numbers may be limited without notice by the CoP sponsor or lead.

The CoP audience is anyone who is finding it difficult to embed M365 into their organisation, and those who have been there and done that are welcome to help solve problems or share stories.

Participation in the M365 CoP is open to all persons of interest, including non-RIMPA Global members, where their experience, expertise, or interest aligns with the objectives of the CoP.

### 8.2 General Participation Expectations

All participants, regardless of membership status are expected to:

- Act in good faith and align with RIMPA Global's values and Code of Conduct
- Contribute constructively and collaboratively
- Respect diverse perspectives, organisational contexts, and levels of AI maturity
- Operate within the scope of this Terms of Reference.

### 8.3 Meeting Protocol

- Meetings are to be held as required. Meetings may be held virtually or in person, depending on the nature of the discussion and participant availability
- Meetings will be convened by the Community of Practice Lead, rather than requiring facilitation by the RIMPA Global Team
- The Community of Practice operates on an informal collaboration model and does not require formal agendas or formal meeting minutes
- Participants will be provided with reasonable notice of meeting date, time, and discussion topics to support effective participation
- Subject matter experts or observers may be invited to participate in discussions where they have relevant knowledge or experience.

## 9: Roles and Responsibilities

To achieve its objectives, the CoP is comprised of a mix of skills, expertise, and backgrounds. Participants must be available when needed, and able to commit to sprints of work.

### 9.1 CoP Lead(s)

The CoP lead(s) are an ambassador and another ambassador to provide backup and support. The lead’s length of service is one year or less; can be reinstated. Their responsibilities are to:

- steer the CoP
- report to MEM or Board
- manage resources – human and technical
- deliver the communication plan
- CoP day-to-day operations
- escalation point for Team Supports or teams
- advocate for the CoP and increasing membership.

### 9.2 RIMPA Global Staff

The Membership Engagement Manager is the RIMPA Global representative who has portfolio responsibilities for member engagement who is to undertake the following:

- Secretariat
- support the CoP lead(s)
- approve actions and communications
- escalation point for CoP lead or Team Supports

### 9.3 CoP Participants

A participant can be any industry person who is interested in learning from an M365 expert or hearing about an M365 case-study and the CoP team's progress.

### 9.4 Problem solving teams

The M365 CoP is to solve problems and create resources for the RIMPA Global community through the formation of problem-solving teams. These teams are to be made up of a designated group of M365 CoP members with a Team Lead, a problem owner and supported by an Ambassador known as a Team Support.

The team is responsible for

- solving a problem in relation to M365 and information management
- advocating for the CoP (where appropriate)
- encouraging other team members.

The Team may remain the same until the problem is solved, or for a cycle of three months and hand-over progress to incoming members. The minimum membership for a team is 1 Team support and 5 members, including a Team Lead and problem owner.



