**CHL Guidelines/Operating Procedures**

**Drafted 11/13/2012**

At the CHL Leadership Conference held October 11-12, 2012, conference attendees worked on developing a set of CHL Guidelines and Operating Procedures. These guidelines were developed to help the CHL Team to be more collaborative, communicative, efficient and effective team members. An email was then sent to the CHL Listserv on October 17, 2012 to ask for input from other members of the CHL team who were not present at the CHL Leadership Conference. The CHL PSC then discussed and refined these guidelines on November 7, 2012. Presented below are the proposed CHL Guidelines and Operating Procedures.

If any issues are noted on these guidelines please contact the CHL Program Director and Assistant Program Director. If no issues are noted we will assume that the team is able to “live with and support” these guidelines and will move forward with incorporating into CHL. These guidelines will be re-visited periodically (e.g., at the CHL Annual Meeting) to evaluate tolerance, usefulness, and applicability.

**Teams: While these guidelines focus primarily on “internal” interaction among CHL team members, we expect these general principles to apply to our interactions with CHL partners.**

**Management Guidelines:**

Role Clarity

* Allocate specific roles to team members and articulate clearly (e.g., in writing) what their responsibilities are. Revisit document as needed and make appropriate changes.
	+ Create an organizational chart of team members
	+ Create a textual list of roles and responsibilities (including jurisdictional and coordinating center point people)

Time Management

* Whenever possible, work with team to determine clear deadlines for assigned objectives. If the objective is big, create a timetable that identifies smaller actions that will result in the achievement of the objective.
* Be ready to adapt to emergencies when necessary, by creating a contingency plan.
* Have a system of regular reminders for high priority deadlines.
* Inform team members when deadlines cannot be met, so that they can make the appropriate accommodations.
* When you have many actions that compete for your attention, prioritize the list and generate deadlines for each action.
* Use a posted or electronic calendar that includes everyone on your team.

**Communication Guidelines:**

Email

* We acknowledge that e-mail is CHL's primary communication system, and our success depends on its appropriate use.
* Minimize the number of attachments, especially if review or feedback is desired.
* Mark the subject with “CHL” in every e-mail that relates to CHL.
* Mark time-sensitive e-mails as “URGENT” with deadline in the subject line. Don't overuse.
* Call if extremely urgent.
* Don't put confidential or private information in e-mails.
* Update subject line as needed.
* Make e-mails concise.
* When e-mailing, be clear at the beginning of an e-mail if a response or action is expected and when.
* For e-mails requesting a response with a deadline, respond to email by deadline, or acknowledge your inability to do so
* If a person is not responding to e-mail, use alternative contact methods (e.g., phone, in-person visit, contact Lead Site Co-I)
* Make alternative contact methods easily available, for example, in your e-mail signature or on the CHL Contact List on Google Docs (ensure it is up-to-date).
* For lengthy times away from e-mail, be sure to activate an “out-of-office” notification.

Conference Call/Meeting

Before the call:

* Plan the agenda.
* Distribute agenda and information in advance.
* Lead Site Co-I or Site Project Manager should ensure jurisdiction representative is on the call where appropriate.
* Clarify meeting responsibilities in advance.
* Arrange for required equipment, information, and people.
* Do your homework before the call.
* Log-in a few minutes before the call, if not possible inform meeting moderator in advance

During the call:

* Say your name slowly when you call in.
* Roll call at the beginning of the call/meeting.
* State identity when commenting/speaking if the group is large or new team members are involved.
* Call/meeting convener maintains the schedule by making sure the discussion stays on track and on schedule. Items needing further discussion should be pursued offline.
* Mute when you are not speaking, especially if you are typing. (Unmute when you are!)
* Acknowledge/involve all participants.
* Call convener sets (Site) order for feedback at the beginning of the call.
* Callers should be active participants.

After the call:

* Make sure meeting minutes are typed up, reviewed by workgroup leaders, and distributed with decisions, follow up actions, timelines and person responsible clearly indicated within a timely manner.

**Organization Guidelines:**

Living a Healthy Lifestyle

* As CHL team members, we will walk our talk by living the six CHL behaviors (increasing fruit/vegetable and water intake while decreasing sugar-sweetened beverage intake; increasing physical activity and sleep while decreasing screen time).
* Have healthy food at meetings.
* Promote physical activity.
* Have water available at all CHL activities.

Enhancing Team Cohesiveness

* Give constant encouragement and always say “please” and “thank you”.
* Stress group effort rather than individual effort
* Set in place a rewards/commendation system possibly once a quarter to spotlight the work of highly effective team members.
* Create a visual (e.g., poster) that shows team accomplishments and post in a prominent place.
* Hold regular team meetings and regularly/occasionally have a staff get together (e.g., potluck), when/if appropriate.
* Model CHL Values