

Items to Include in Your Collaborative Planning Charter

The charter guides the planning process by laying out the guidelines and expectations for participation, defining norms and operating protocols, and presenting options for addressing challenges.

Items to Include in Your Collaborative Planning Charter	
Basics	<ul style="list-style-type: none"> • Collaborative planning group purpose, authority, and duration • Operational structures within the planning group
Membership	<ul style="list-style-type: none"> • Core principles of membership in the planning group • List of planning group members and their affiliations • Member roles and responsibilities, including qualifications, expectations, and commitments
Roles	<ul style="list-style-type: none"> • The roles of state health department staff in providing technical assistance and support to the collaborative planning process, including managing logistics for meetings • The roles of consultants such as external facilitators in the planning process
Processes	<ul style="list-style-type: none"> • Collaborative processes to be followed, including: <ul style="list-style-type: none"> ○ Methods to assure equity in dividing workload and acknowledgement of contributions, ○ Consensus building and conflict resolution techniques; ○ Approaches to obtain feedback from key stakeholders and affected populations; ○ Group decision-making techniques. • Communication systems
Guidance	<ul style="list-style-type: none"> • Guiding documents (if they exist) • Inter-Organization Agreements such as Memorandums of Understanding that support the collaborative planning process and its outputs, including: <ul style="list-style-type: none"> ○ Dissemination of the state plan ○ Resources to be contributed to support the collaborative planning process, including in-kind resources such as the use of meeting rooms and technology, the release of staff to attend in meetings and complete assignments, travel expenses and other costs.