



## CDFG, Marine Region

*Mission Statement: To protect, maintain, enhance and restore California's marine ecosystems for their ecological values and their use and enjoyment by the public*

# E-MAIL GUIDELINES

## PURPOSE

To minimize the number of e-mails sent and received to complete work in a timely manner and keep only appropriate and necessary individuals in the loop.

## IDENTIFY AND AGREE ON THE E-MAIL LIST FOR THAT PROJECT

- Ask yourself and team who should be on the e-mail list, and how they connect [network or remote (DSL or phone modem)]?
- Decide who else needs the info if they are not on the project team (CC:)
- Who wants/needs attachments, who wants to get them from common drive?

**DECIDE IN THE SUBJECT LINE WHAT IS THE KEY INFO NEEDED FOR FILTERING BY THE RECIPIENT?** This field should always be filled in. Use key words:

- **Status** (followed by subject)
- **FYI** (informational),
- **Action by [DATE] needed, Input required, Assignment to [Initials]**
  - **If Input needed – from [initials], by [date]**
  - **RSVP requested to all or sender??**
- **Decision** made
- **"Hot topic"**, (for example emergency closure)
- Warning for **Large file** attached (see below)
- EOM can be used at the end of the subject line when there is no message in the body of the e-mail to indicate the **End Of Message**
- **Be aware of message content:**
  - Put meeting request (date/time), assignment, etc. UP FRONT in case reader does not read to the end.
  - Remember e-mails are considered written communications and are subject to later "public record" requests. Need discretion in what goes in them as written record.
  - XXX project related? Put in first line.
  - When no discussion is needed use one liners and bullets or hyphens.
  - Expectation for response (more details on RSVP) [e.g. Respond by this time or date or it will be scheduled anyway].
- **Consider Attachments:**
  - Are all attachments necessary for everyone? Perhaps you should send two separate e-mails.

- Please consider the size of attachments - particularly large ones.
    - Can they be saved under an alternate (= smaller) format?
    - Send items in most user-friendly formats. Can't assume that everyone is 1) connected to the network, 2) has a direct line; we do have remote users, 3) tied to the same formats.
    - Can/should they be zipped?
    - Should/can they be posted on the common drive?
  - File naming convention – topic, ver(sion), date, initials
    - IF there is rapid reviewing in progress, add the time after date
- **Use signature block and/or other individual identifier at end of e-mail.**

### **Communication Guidelines with Point of Contact –**

- **Overall: Keep all emails transparent and to whole group**
- Do Send CC if:
  - Guidance is needed
  - Prioritization requested
  - Clarification needed
  - Accountability, per her request (this request can be written in the body of the e-mail)
  - FYI (For your information), something is happening
  - Decision made
- Do not send if:
  - It is a discussion (or string together all the discussions into one message before sending)

**Comments** - If you make an assignment or provide an action item via e-mail, – it is a good idea to follow up with a phone call to verify receipt and clarity.

**Future plans** – Identify staff to review the latest GroupWise version for help with some of these items, such as filtering.