



CHECKLIST: Bargaining, Grievance, Membership and Organizing Team Coordination

Organizing a Power Base for Bargaining

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| ☐ Yes | ☐ No | 1. Has the Chapter developed a negotiations calendar or timetable? Does it estimate a target date for settlement or the start of a crisis operation? |
| ☐ Yes | ☐ No | 2. Have Chapter leaders planned to ensure constant coordination between the Chapter's contract proposal development, negotiations and related support activities? |
| ☐ Yes | ☐ No | 3. Has the Chapter adequately budgeted for team expenses (training sessions, resource materials, meals, refreshments, meeting facilities and printing services, etc.)? |
| ☐ Yes | ☐ No | 4. Do you and all other leaders understand and accept the active role you must play in coordinating support for the bargaining process? |
| ☐ Yes | ☐ No | 5. Has the Chapter's policy-making body fully discussed the bargaining objectives, made additional changes as needed, and adopted them as the Association's bargaining position? |
| _____ | _____ | Total of each response |

Developing and Implementing Effective Communications

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| ☐ Yes | ☐ No | 1. Does the Chapter have an accurate listing of the name; home address and phone number; work site and phone number; personal e-mail address; and membership status of every unit member? |
| ☐ Yes | ☐ No | 2. Has the Chapter developed and regularly tested a telephone tree or other rapid response method so that a message can quickly be sent to all Association representatives and thus to all unit members? |
| ☐ Yes | ☐ No | 3. Does the Chapter regularly publish an effective newsletter? |
| ☐ Yes | ☐ No | 4. Has the Chapter appointed a small group to publish special bargaining bulletins immediately after each negotiation session? |
| ☐ Yes | ☐ No | 5. Has the Chapter organized a drop system, capable of delivering printed material to all work locations quickly, without using district mail? |
| ☐ Yes | ☐ No | 6. Has the Chapter developed a system for getting its leaders to visit sites regularly, to answer members' questions about the bargaining effort, and to recruit their continued support? |
| ☐ Yes | ☐ No | 7. Has the membership had an opportunity to review the tentative bargaining objectives, discuss them in building meetings, and suggest modifications? |
| _____ | _____ | Total of each response |



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Negotiating Effectively at the Table

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|------------------------------|-----------------------------|---|
| ☐ Yes | ☐ No | 1. Are Chapter leaders aware of the following dates, and their significance: expiration of the current contract; decertification window period; deadline for submission of the Chapter proposal for successor agreement and any reopeners, as required by the current contract? |
| ☐ Yes | ☐ No | 2. Has the Chapter identified, asked for input from, and kept contact with all special interest groups within the bargaining unit, so that all employees' interests will be represented properly? |
| ☐ Yes | ☐ No | 3. Has a committee identified changes to the current contract, as well as all other current district policies affecting unit members? |
| ☐ Yes | ☐ No | 4. Has the Grievance Committee reviewed records of recent grievances, and records of problems that arose but were not grievable, and developed suggestions for new bargaining objectives? |
| ☐ Yes | ☐ No | 5. Have available CTA/NEA resource materials been used in identifying objectives, and drafting proposals? See especially the CTA Contract Reference Manual, available through your Primary Contact Staff and on CTASearch.org. |
| ☐ Yes | ☐ No | 6. Does the Bargaining Team have copies of all district financial documents? Has the Team determined the cost of its proposals? Have they evaluated the comparability of the proposal to determine the strength of your position? Have they examined the proposal with potential impasse in mind? Have they proposed changes to Chapter leadership after this analysis? |
| ☐ Yes | ☐ No | 7. Has your Primary Contact Staff been consulted and kept informed as your Chapter develops its bargaining objectives? |
| ☐ Yes | ☐ No | 8. Has the writing team developed supporting proposal language to incorporate all bargaining objectives that have been adopted? |
| ☐ Yes | ☐ No | 9. Has your Primary Contact Staff reviewed the draft of the contract proposal to make sure there are no technical weaknesses or inadvertent omissions? |
| _____ | _____ | Total of each response |



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Establishing Goals and Setting Priorities

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|------------------------------|-----------------------------|--|
| ☐ Yes | ☐ No | 1. Has the Chapter developed a comprehensive contract proposal that follows a sequential outline for bargaining? |
| ☐ Yes | ☐ No | 2. Has the Chapter solicited input into the development of the contract proposal from all unit members of the bargaining unit, as required by the duty of fair representation? |
| ☐ Yes | ☐ No | 3. Has the contract writing committee solicited input from all job groupings within the bargaining unit? |
| ☐ Yes | ☐ No | 4. Have identified unit member and organizational needs been used as the basis for writing the first draft of the comprehensive contract proposal in conceptual form? |
| _____ | _____ | Total of each response |

Developing Community Support

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|------------------------------|-----------------------------|---|
| ☐ Yes | ☐ No | 1. Does the Chapter have a community action program to identify and gain support from community opinion leaders, as well as from organizations with allied interests? |
| ☐ Yes | ☐ No | 2. Has the contract writing team written the initial proposal in conceptual form for public presentation? |
| _____ | _____ | Total of each response |

Coordinated Bargaining

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|------------------------------|-----------------------------|--|
| ☐ Yes | ☐ No | 1. Is the Chapter actively participating in a coordinated bargaining cluster with nearby Chapters? |
| ☐ Yes | ☐ No | 2. Has your Chapter compared bargaining objectives with those in your coordinated bargaining cluster, to assure unity and cooperative efforts? |
| _____ | _____ | Total of each response |