



CHECKLIST: Bargaining, Grievance, Membership and Organizing Team Coordination

Organizing a Power Base for Bargaining

- | | | | |
|------------------------------|-----------------------------|---|---|
| <input type="checkbox"/> Yes | <input type="checkbox"/> 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? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | 2 | Have Chapter leaders planned to ensure constant coordination between the Chapter's contract proposal development, negotiations and related support activities? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | 3 | Has the Chapter adequately budgeted for team expenses (training sessions, resource materials, meals, refreshments, meeting facilities and printing services, etc.)? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | 4 | Do you and all other leaders understand and accept the active role you must play in coordinating support for the bargaining process? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> 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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|------------------------------|-----------------------------|---|---|
| <input type="checkbox"/> Yes | <input type="checkbox"/> 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? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> 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? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | 3 | Does the Chapter regularly publish an effective newsletter? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | 4 | Has the Chapter appointed a small group to publish special bargaining bulletins immediately after each negotiation session? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | 5 | Has the Chapter organized a drop system, capable of delivering printed material to all work locations quickly, without using district mail? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> 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? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> 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		
<input type="checkbox"/> Yes	<input type="checkbox"/> 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?
<input type="checkbox"/> Yes	<input type="checkbox"/> 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?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	3. Has a committee identified changes to the current contract, as well as all other current district policies affecting unit members?
<input type="checkbox"/> Yes	<input type="checkbox"/> 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?
<input type="checkbox"/> Yes	<input type="checkbox"/> 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.
<input type="checkbox"/> Yes	<input type="checkbox"/> 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?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	7. Has your Primary Contact Staff been consulted and kept informed as your Chapter develops its bargaining objectives?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	8. Has the writing team developed supporting proposal language to incorporate all bargaining objectives that have been adopted?
<input type="checkbox"/> Yes	<input type="checkbox"/> 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

- 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

- 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

- 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

