

# Organizing for Settlement Fund Assessment Team Report



**THE VOICE FOR PROFESSIONAL  
EDUCATORS AND STUDENTS**

Complete this form before your Organizing for Settlement Fund Assessment meeting. Please bring two copies for Education Minnesota as well as enough copies for anyone attending the meeting.

For assistance completing the form, please contact your staff representative.

### *Union Contact Information*

Name of Local Requesting Assistance: \_\_\_\_\_

Name of Local President(s): \_\_\_\_\_

Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Home Email: \_\_\_\_\_

Name of Lead Spokesperson/Lead Negotiator: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Home Email: \_\_\_\_\_

Name of LCAT Team Lead or Organizing Chair: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Home Email: \_\_\_\_\_

Name of Local Communications Contact: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Home Email: \_\_\_\_\_

### *Description of the Unit*

Number of bargaining unit members: \_\_\_\_\_

Number of probationary employees: \_\_\_\_\_

Number of full-time employees: \_\_\_\_\_

Number of part-time employees: \_\_\_\_\_

Number of potential members: \_\_\_\_\_

Number of worksites: \_\_\_\_\_

Other relevant characteristics of the unit (new vs. experienced staff, percent with advanced degrees, percent likely to retire within a few years or other characteristics that help to describe the people in the unit):

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### *Financial Status of Employer*

Have you examined a financial audit of the employer? ☐ Yes ☐ No

If so, what is the financial condition of the employer:

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Poor</b>				<b>Healthy</b>
<i>Statutory</i>				<i>Sufficient</i>
<i>Operating</i>				<i>Fund Balance</i>
<i>Debt</i>				

What is the Employer's Fund Balance as a Percent of Total Expenditures for previous 5 years?

				Year
\$	\$	\$	\$	\$

Describe general situation, referencing state payment delays, administration compensation and other factors.

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Briefly describe the major unresolved bargaining issues, describing the district and union positions:

Issue	Union position	Employer position	Connection to students and EM bargaining goals

Are there any unusual circumstances within the employer? (i.e. superintendent administration is leaving)

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### *Preparations for Negotiations*

- ☐ Yes ☐ No Has the local/state affiliate formally surveyed the membership regarding their desires and attitudes?
- ☐ Yes ☐ No Has the local/state affiliate consulted with the Education Minnesota field staff person assigned to the local regarding negotiations strategies?
- ☐ Yes ☐ No Is there a local and community action team (LCAT) or settlement committee in place?

When will the committee meet? \_\_\_\_\_

How will the LCAT/settlement committee communicate with the negotiations team?

\_\_\_\_\_

\_\_\_\_\_

What is the local ratification process (as defined in your local Constitution/ Bylaws)?

\_\_\_\_\_

\_\_\_\_\_

### *Member Communications*

Please indicate communication strategies used to keep members informed:

- ☐ Newsletter ☐ Email ☐ Personal contacts ☐ Building/local meetings
- ☐ Flyers ☐ Social Media ☐ Website ☐ Other (please describe): \_\_\_\_\_

### *Community & Labor Support*

Have any other employee groups in the district been contacted? ☐ Yes ☐ No

Has the local contacted any other labor groups or labor councils? ☐ Yes ☐ No

Are there any common goals? ☐ Yes ☐ No If so, please explain:

\_\_\_\_\_

\_\_\_\_\_

Has the local outlined a plan to build relationships and communicate with the community on key issues? Briefly explain:

\_\_\_\_\_

\_\_\_\_\_

Are the decision makers for the school district present at the table? ☐ Yes ☐ No

## *Organizing Activities and Planning*

What is your goal date for settling your contract?

### **Internal assessment:**

- What are members willing to do in support of the contract?
- How will you increase member participation?

### **Internal activities:**

What will you do?	When?	Who is responsible?	Notes
1.			
2.			
3.			
4.			
5.			

*For examples, go to [www.flickr.com/photos/educationminnesota/sets](http://www.flickr.com/photos/educationminnesota/sets).*

**External assessment:**

- Who do we need to pressure to ensure our contract is settled?
- How do we apply that pressure?
- How can we work with members of the community and other labor unions?
- What positive public relations and media opportunities exist?

**External activities:**

What will you do?	When?	Who is responsible?	Notes
1.			
2.			
3.			
4.			
5.			

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*Local President's signature*

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*Date*

*For examples, go to [www.flickr.com/photos/educationminnesota/sets](http://www.flickr.com/photos/educationminnesota/sets).*



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*Education Minnesota is an affiliate of the American Federation of Teachers,  
the National Education Association and AFL-CIO.*

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