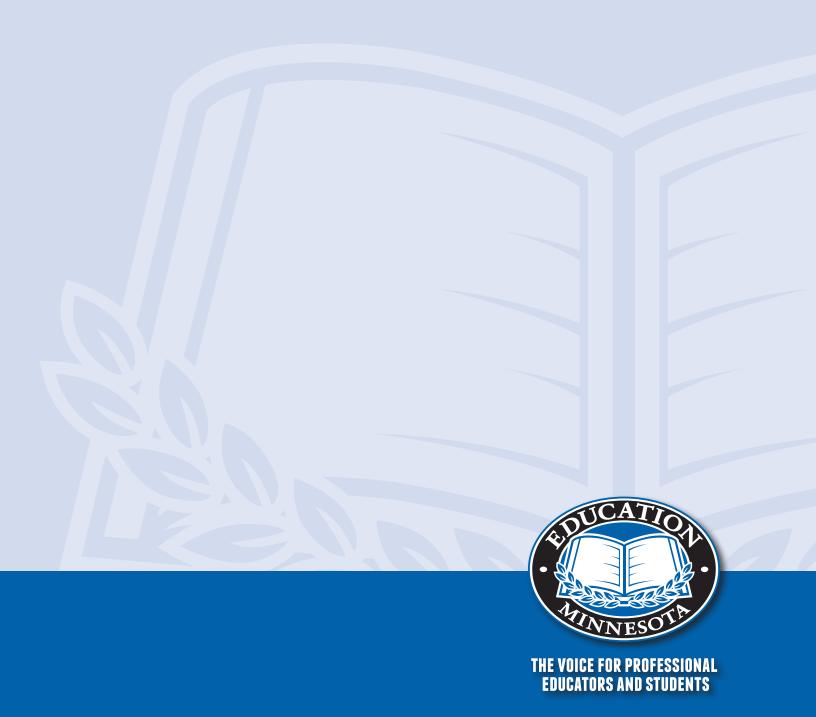
# Organizing for Settlement Fund Assessment Team Report



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:	
Home Phone:	Home Email:
Name of Lead Spokesperson/Lead Negoti	ator:
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 (advanced degrees, percent likely to retire that help to describe the people in the unit	within a few years or other characteristics

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
0	0	0	0	0
Poor				Healthy
Statutory Operating Debt				Sufficient Fund Balance
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.				

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)			

Prepai	rations ;	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 w team?	vill the L	CAT/settlement committee communicate with the negotiations
What i Bylaws		cal ratification process (as defined in your local Constitution/
Memb	er Com	nmunications
Please	indicate	communication strategies used to keep members informed:
□ New	sletter	☐ Email ☐ Personal contacts ☐ Building/local meetings
□ Flye	rs 🗆 S	Social Media □ Website □ Other (please describe):
Comm	unity C	's Labor Support
Have a	ny othe	r employee groups in the district been contacted?   Yes No
Has th	e local c	ontacted any other labor groups or labor councils?   Yes No
Are the	ere any c	common goals?   Yes   No If so, please explain:
		outlined a plan to build relationships and communicate with the key issues? Briefly explain:
Are the	e decisio	n 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.

# **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.			
Local President's signature		Date	

For examples, go to 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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