

Local President's Settlement Assessment Checklist

Pre-Assessment

Complete the Organizing for Settlement Team Report.

Begin formation of a settlement committee, if not already in place.

Invite members to the assessment (local governance, negotiators, settlement committee, and local treasurer).

Assessment

The local president must attend the assessment.

Bring a copy of the team report and a copy of the local's constitution and bylaws.

Refreshments or meal expenses for the assessment will be paid by the Education Minnesota Officer or field staff in attendance at the assessment.

Education Minnesota Vice President or Secretary-Treasurer and Education Minnesota field staff will attend the assessment. The Education Minnesota officer in attendance will chair the assessment.

Post-Assessment

Finalize a settlement action plan and budget. If you have accessed the fund previously, you will need to identify which budget items are new and which are being enhanced. If items are being enhanced you must list **how** the items are being enhanced.

Collect and document all items used with Organizing for Settlement funds on the expense form including (but not limited to) itemized receipts for all purchases and sign-in sheets for food and beverage events.

Within 90 days of the assessment, complete the loan application, along with the necessary documentation, and email it to Janel Engesser at OFS@edmn.org or mail it to:

Education Minnesota
Attn: Organizing for Settlement Fund
41 Sherburne Avenue
St. Paul, MN 55103

Post-Settlement

Return unused portion of loan to Education Minnesota within 60 days.

Costs incurred more than 60 days after the ratification of the contract will ordinarily not be considered for reimbursement from Organizing for Settlement Fund Committee. An extension may be granted by the Education Minnesota Secretary- Treasurer if circumstances make compliance difficult.

Complete the Organizing for Settlement Expense Report (or Excel spreadsheet with similar columns). Mail the report, **copies** of the original receipts and sign in sheets to Education Minnesota.

The Organizing for Settlement Fund Committee will recommend the loan be converted to a grant. Eighty percent of the eligible loan expenses will be paid by the Organizing for Settlement Fund. Twenty percent will be paid by the local.