

Negotiations Preparation and Planning Stage

1. **SMART(ER)** planning (Specific, Measurable, Attainable, Realistic, (Evaluate, Review))
 - Get calendar out set deadlines and plan backwards to give time you need
2. Read your contract
 - Alone and in group discussions
 - Make sure to read key clauses and check dates
 - Recognition
 - Reopeners if applicable
 - Negotiating unit & exceptions
 - Grievance/Discipline/Time and Steps
 - Management rights
 - Pay/Benefits
 - Dues deductions
 - Types of Time off
 - Duration clause and dates
 - Seniority
 - Layoff/Recall
3. Compare with other contracts (older and different unions-go on line to PERB if needed)
 - See what was won or lost or if language is tighter or looser
 - Shall, may, regular, reasonable – What do these terms mean, do negotiating notes back up your understanding
4. Mapping coworkers
 - Titles, Work locations, Shifts (how many and start/end times), Full timers/Part timers/Seasonal

Negotiations Preparation and Planning Stage

5. Survey members

- Mailer, flyer, email, worksite, phone calls

6. Contract Action Team vs Negotiating Table

- Define roles for team and table-

- Team

- Communications
- Phone tree assignment
- Flyers-
meeting/informational
- Collector/Organizer
of information

- Table

- Lead Negotiator
- Note taker
- Historian
- Researcher
- Numbers person

7. NOTICE to bargain

8. FMCS notice (private sector)

9. Information requests

10. Proposals

11. Mapping management

12. Leverage points