

## Checklist for ensuring our NSO affiliate is ready<sup>1</sup>

This checklist is should be used as both a reminder of what needs to be done and a reflection sheet on how you're going about your business and whether of not there might be a more effective way to work.

### *Establish an Action/Organizing Committee<sup>2</sup>*

#### *Planning and data gathering*

Yes	No	To Do
		Is this crisis real?
		Has the Action/Organizing (A/O) Committee been named?
		Are there other employee unions organized under the same employer?
		Do they have an A/O Committee?
		Have you contacted them?
		Have you set up a liaison with, or a joint session with, the other unions?
		Do you have a separate organizing location from which to operate <sup>3</sup> ?
		Has your Union's leadership clearly defined and stated the issue(s)?
		Has your Union's leadership clearly determined specific goal(s)?
		Has your Union's leadership, in conjunction with the A/O committee, clearly outlined a plan with strategies and tactics?
		Does this plan have deadlines for all tasks that need to be completed?
		Do you have a timeline for completion of tasks and eventually for a calendar of events?
		Is there a budget for the A/O committee and subsequent actions?
		Is there a communications drop system in place?
		Is there a phone chain for our NSO members in your affiliate?
		Do you have all of the email contacts for all members and key players?
		Is there a site map for each location in which we have members?
		Have you begun the data collection?
		Do you have contact information for your NSO Affiliate's officers?
		Do you have contact information for your NSO Affiliate's board and or rep council members?
		Do you have your NSO Affiliate Members' contact information? <sup>4</sup>
		Do you have NSO Affiliate Retired member contact information <sup>5</sup>

<sup>1</sup> Please read the accompanying document to see a more detail explanation of what we should be doing to get ready to face a crisis.

<sup>2</sup> Remember, this is not intended work for a handful of NSO members in your affiliate. There should be outreach made by the Action/Organizing committee to members that have some specific talents and abilities that will be useful for your organization's success.

<sup>3</sup> It is always preferable that these locations are external to any location owned, leased or occupied by the employer or any of its local affiliates.

<sup>4</sup> **Include Name, address, telephone #'s (home & cell), non-work email, Position and worksite, Relevant talents, Community or other contacts member has, Member's Union history** (Remember, if our members have summer addresses that information should be collected in addition to the regular contact info).

<sup>5</sup> Collect all relevant data as you did with active members.

	<b>No</b>	<b>To Do</b>
		Have you collected information on special skills, abilities, contacts, etc. of your members and their willingness to help? <sup>6</sup>
		Have you determined power brokers within the Employer's structure
		Do you have the contact information for the officers of your employer?
		Do you have the contact information for the employer's Board Members?
		Do you have the contact information for the non-union headquarters staff of your employer?
		Do you have contact information for the local leaders?
		Have you prepared media contact information for state, regional and local media, including: Wire Services, Newspapers, Radio, Television, Internet services? ...
		Do you have a complete list of any and all unions whose membership works for the Employer whether affiliated with NSO or not?
		Do you have contact information for the leadership of those organizations?
		Do you have a list of names and contact information of those unions that are external to your employer within your state?
		Have you established means of regular communication with your members?
		Do you have an organized Association Rep system for 1-1 contact?
		Do you have a Newsletter? <sup>7</sup>
		Regular email communication? <sup>8</sup>
		Small group meetings?
		Website? <sup>9</sup>
		Do you keep and maintain a list of all key contact people who are on NSO committees, elected as regional board members, officers, etc. that may be called upon for assistance during the crisis?

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<sup>6</sup> Doing one-to-one (1-1) member interview The data from these interviews, and building a stronger core of the organization should be an on going internal organizing activity. Access the data from these interviews because if you have been organizing internally in this manner then the information you have gathered and the relationships developed will be invaluable at this time. 1-1's can begin at any time. Contact NSO for training if needed.

<sup>7</sup> Hand delivered is better than electronically delivered

<sup>8</sup> Other social media may be more acceptable. Remember, don't spam when there are other alternatives. Electronic communications should reinforce organizing conversation and literature themes of the week. Exercise discipline on what will be posted.

<sup>9</sup> Websites should feature the names, faces and words of member activists.

## Finances

Yes	No	To Do
		Have you scrutinized the employer's finances?
		Do you know what the shortfall is the employer claims is causing the layoff or contract reopener?
		Have you audited the employer's books?
		Do you know if the income aligns with the employer's claims?
		Are there areas of expenditure of which you were unaware?
		Are there unnecessary expenditures? <sup>10</sup>
		Are there reserves/surpluses in the employer's budget?
		Does the history of budgets show whether budgeted income and actual income is consistent?
		Is there a gap between projected expenditures and actual?
		What is the projection between income and expenditures?
		Is management using Association assets to generate alternative resources of income?
		Are there any subcontracted services?
		Do you know the employer's policies regarding budgets, required reserves, expenditures, etc.?
		Does the NSO affiliate attend all budget preparation and budget hearing meetings?
		Is the employer completely transparent with their finances?

## Contract talks, etc

Yes	No	To Do
		Have you involved all of your membership in the preparation of these crisis negotiations?
		Do you use personal 1-1 meetings to gather information?
		Do you use small group meetings to gather information?
		Do you only use paper and/or electronic surveys to gather input from members? If you answer "yes" here you might want to rethink your approach to member input.
		Do you use "in person" meetings to brainstorm ideas?
		Do you use 'web meetings' to brainstorm ideas?
		Have you assessed who is being hit with cutbacks? Just our members? Other staff? Employing organization's officers, executive director, managers/directors, members...?
		Do you monitor what locals are doing?