

The DWK Difference: Collaborative & Student-Centric, consistent with DWK's proven approach to labor and negotiations, this preparation is not about "winning"—it is about empowering the district team to engage in thoughtful, collaborative bargaining. We help you address real issues while keeping students' best interests at the center of every decision.

Successful and effective negotiations begin before you walk in the room.

To secure the best outcomes for your district, preparation is non-negotiable. Use this best-practices framework to support your team, establish clear economic parameters, and keep students at the center of the conversation. This checklist will also ensure the district team is ready to respond to the usual requests for information (RFIs) likely to be made in the course of bargaining.

- ☐ Cost of 1% salary increase for each unit/management/confidential and aggregate for all employees.
- ☐ Breakdown of percentages for statutory benefit add-ons (e.g. STRS, PERS, UI, Medicare, Workers' Comp etc.) when computing cost of 1% salary increase.
- ☐ Budgeted current and projected cost of step and column movement in dollars and as a salary percentage increase equivalent for each unit.
- ☐ Number of FTE in certificated bargaining unit based on up to date scattergram (and comparison to most recent J-90).
- ☐ Multiyear budget assumptions (MYP) for current and next two years' revenue increases (primarily increases in assessed property value for community funded; statutory COLA for LCFF).
- ☐ Dollar amount of a 1% salary increase for all employees compared to dollar amount of a 1% increase in assessed property value or COLA.

- ☐ Budget Expenditures:
 - ☐ Percentage of unrestricted general fund expended on salaries and benefits for certificated unit.
 - ☐ Percentage of unrestricted general fund expended on salaries and benefits for all employees.
 - ☐ Data in above two items for prior 3-5 years.
 - ☐ Budget assumption for hiring a certificated employee (e.g., average salary or designated step and column amount, or flat amount?).
 - ☐ Budgeted personnel costs: how many FTE actually filled compared to budgeted vacancies (current and historically, e.g. past 2-3 years).
 - ☐ Budget MYP assumptions for Health and Welfare increases.
- ☐ Salary Schedule(s) Scattergrams (as recent as possible).
- ☐ Health and Welfare (HW) Benefits:
 - ☐ District contractual maximum premium contributions.
 - ☐ Cost of all plans, plan year(s) and projected increases when known.
 - ☐ HW scattergram/information re which members take which plan and levels of coverage employee only etc.
 - ☐ Actual cost per FTE of providing HW benefits (divide total annual cost of benefits by number of participants in plan – primarily medical).

For additional resources, guidance, and training on collective bargaining and negotiations, contact DWK's Labor, Employment and Personnel team at **DWKesq.com/contact** to learn how we can support your district. Reach us at **ClientServices@DWKesq.com**.