

* Please note this checklist is just an example. Labor and Agency representatives are encouraged to change and adapt this list in a way that suits your needs.

Pre-Decisional Involvement Expectations Agreement Checklist

When engaging in Pre Decisional Involvement (PDI), there are critical pieces to remember:

- By participating in PDI, the parties do not waive their statutory rights.
- It is important to check the applicable collective bargaining agreement and any other agreements or established practices for information about the PDI process and/or about the subject to be discussed in PDI.
- Even if bargaining unit employees are included in the PDI process, the union remains the exclusive representative for the bargaining unit.

For the PDI process to be successful the parties should identify and clarify the expectations up front before discussions begin. The designated representatives for both parties should discuss and capture in writing what the expectations will be for this PDI engagement BEFORE the PDI discussions begin. It is strongly suggested that the first meeting be used to determine, at a minimum, the following items:

- Type of PDI engagement.
 - What types of activities will comprise the PDI engagement. (Please note that some PDI engagements may have phases or multiple activities.)
 - What level of union representation will be involved (e.g., National or Intermediate or Local?, President or Steward?, subject matter expert?) for each activity of the PDI engagement?
- PDI team membership.
- Meeting support personnel.
 - Will the meetings require support personnel, such as a facilitator, note-taker, and/or any subject matter experts (SMEs)? (Please note that the participation of a labor relations specialist or other representative may be required.)
 - How will these support personnel be utilized and what are their respective roles?

- Equipment/Technology needed. Does everyone have access to the same tools?
- What is the group's expectation for the PDI process?
 - Will the parties use interest-based problem-solving techniques?
 - Will there be a facilitator?
 - Is the PDI process governed by the collective bargaining agreement or a Labor-Management Forum charter or other agreement?
- What is the group's expectation for an outcome? Expected outcomes might be
 - Information sharing
 - Development of proposals
 - Memorandum of Understanding
 - Some combination of the above.
- Future meeting methods (face-to-face, video conference and/or teleconference,). Give consideration to the cost efficiency of travel relative to the complexity of the subject matter.
- Identify how the logistics for the follow-up meetings will be completed. Will the group rotate it?
- Confidentiality and communications.
 - Is there any information that is considered confidential?
 - How is it "normally" protected?
 - What methods can the parties offer to monitor the release of information during the process?
 - How will the group's efforts be communicated to the organization, e.g., periodic status reports, etc.?
- Timelines for the group to complete the PDI session(s).
- How the group's final product will be captured depends on the type of PDI that was initiated, the expected outcome and the actual outcome. One or more of the following may be the final product:
 - MOU
 - statement of facts
 - meeting notes