

* 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 Invitation Checklist

When initiating pre-decisional involvement (PDI), a representative from either labor or management may choose to provide a written invitation to the receiving party. A written PDI invitation that includes the items listed below will assist in the PDI process:

- The name and title of the designated representative to whom the invitation is addressed.
- The phrase “PDI Invitation” in addition to the issue or topic in the subject header of the letter (and of an e-mail message, if that is the method of delivery).
- Summary background and rationale for the initiative or the proposed change (may outline specific initiative or indicate that it is contained in the information package). Please note that the amount of information provided may be limited if PDI is being initiated at a very early stage.
- The type of PDI model or outcome that the initiating party is seeking. If there are multiple phases of the initiative which will include different types of PDI engagement, clearly break these out for the receiving party.
- Identification of the potential impact to the organization and/or to affected bargaining unit employees.
- Timelines and any proposed implementation date(s), if known.
- To whom to respond and his or her contact information.

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- The desired “reply-due” date(s).
- The PDI information package (as an attachment).
- Any confidentiality requirements or concerns related to the topic.
- Proposed available dates for discussions to begin as well as the type of meeting (video conference, teleconference, face to face, etc.).
- A description of expectations upon completion of PDI.(See e.g., FAQ section B.; Checklist #5 – Expectations; Outcomes Module)
- If the topic requires a strong background in a particular subject area, a request for a designated representative who has a background in that subject area; also, identify the notifying party’s Subject Matter Expert (SME) contact information.
- Signature or transmission by the appropriate designated representative.