

Labor-Management Standards and Practices For Deciding Health Benefits

Review your practices on the following activities and behaviors by circling the letter that is closest to your perception of what exists now.

Please note: This tool is intended to provide a means to assess and reflect on your current practices. The objective is to review what your team is doing compared to standards, and to discuss what it would like to learn more about or change.

- 1) The parties meet jointly to discuss health benefits issues:
 - a) on an as-needed basis
 - b) occasionally
 - c) at regularly scheduled intervals
 - d) more than once a month at regular meetings and on other occasions

- 2) Our joint meetings are chaired by:
 - a) union staff
 - b) district representatives
 - c) broker/consultant
 - d) the labor or management co-chair, according to established ground rules

- 3) The parties publish joint newsletters or regular communication pieces:
 - a) never
 - b) once or twice a year
 - c) irregularly
 - d) each month or more on a regular basis

- 4) Informational meetings are conducted at the site level:
 - a) never
 - b) only when there are changes in benefits
 - c) two or three times a year
 - d) at least once a month

- 5) The parties attend national, state, regional, area meetings and training:
 - a) never attended training
 - b) not within the last 18 months
 - c) trained by consultant/broker
 - d) the same people attend over and over
 - e) different people attended numerous events in the last 12 months and reported back to the group

- 6) The parties assess the interests of plan participants:
 - a) never
 - b) perhaps once a year, generally about contract bargaining and usually a written survey
 - c) two or three times as issues arise, generally on a personal basis
 - d) more than three times a year as part of organizing and program delivery

- 7) The parties have joint access to the consultants/brokers and any information they provide:
 - a) yes, at regular meetings
 - b) yes, through the district representatives
 - c) yes, through the union representatives
 - d) no

- 8) The parties jointly review consultants' and/or brokers' agreements, including fee structures and scope of services:
 - a) On an annual basis
 - b) When the agreements are open for renewal
 - c) Never

- 9) The parties have joint goals and a plan to achieve them:
 - a) We only react.
 - b) We have only activities.
 - c) We've talked about goals and a plan. We may have goals but we have no real plan to achieve them.
 - d) We have an annual goal planning meeting and regularly evaluate our progress.
 - e) We have short and long-term goals and a plan to achieve them.

- 10) The parties have reviewed their respective fiduciary duties:
 - a) yes
 - b) somewhat
 - c) no