

## CONFIDENTIAL EMPLOYEE CHECKLIST



1. What is the employee's job title?
2. Describe the employee's duties.
3. Describe the employee's work location.
4. For whom (name and title) does the employee work? Describe the supervisor's job duties. Is the employee the only subordinate of his/her supervisor?
5. Does the employee receive fringe benefits and salary different from bargaining unit employees? Is s/he on a salary schedule?
6. What is the size (total number of employees) of the District? How many of the employer's employees are undisputedly confidential? What percentage of the work force?
7. Does the employee handle personnel functions? Explain and give examples.
8. Are the personnel matters to which the employee has access related to employee relations? How? Does s/he have access to such material in the normal course of his/her job?
9. What, specifically, is the role of his/her supervisor in negotiations and/or contract administration? What is the frequency of the supervisor's involvement? What is the supervisor's role vis-a-vis other management/supervisory employees involved in negotiations and/or contract administration?
10. Does the employee have regular access to confidential information concerning the effects of bargaining proposals? Explain.
11. Is the employee involved in the preparation of materials for negotiations? Explain and give examples.
12. Is the employee involved in the stream of communications (including handling of correspondence) among employer representatives regarding negotiations issues? Explain and give examples.
13. Does the employee gather salary and benefits data of other employers? Is the employee involved in, or have knowledge of, the determination regarding how the data will be used in negotiations by the employer?
14. Does the employee have access to information relating to employee grievances and/or the employer's position on those grievances?

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15. Is the alleged confidential information to which the employee has access available to the public?
16. Does the employee type and/or file proposals, counter-proposals, or notes used in negotiations?
  - a. Does s/he type grievance-related matters?
17. Is the employee involved in actual negotiations or grievance processing? In what capacity? Does s/he attend negotiations sessions? Caucus? If so, does s/he take notes? What percentage of his/her time is spent performing these duties?
18. Is his/her participation in bargaining or grievance processing more than "incidental" to his/her regular job responsibilities? Explain.
19. Are the negotiations matters to which the employee has access merely reflections on what occurred at previous negotiations sessions between the parties?
20. Does the employee assist in drafting contract language for negotiations? Explain.
21. Does the employee attend management meetings? Are employee relations matters discussed at those meetings? Describe.
22. Does the employee perform cost evaluations or project future costs on any proposals made in bargaining by employee organizations? Is his/her involvement in costing negotiations proposals more than simple mechanical cost calculations?