

Negotiations Preparation Checklist



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Purpose

Below is a list of process questions that can assist prepare for negotiations. The list focuses on a comprehensive understanding of the goals and opportunities from the community’s perspective, aggregation of information, and consideration of potential situations during the negotiations and implementation. The negotiation team will be better prepared to respond effectively by running through different scenarios before engagement.

Directions

Use this worksheet to assess your preparations.

Readiness: Use the stars to show how ready you are. 1 star ☆ = you have not yet begun to address this item. 5 stars ☆☆☆☆☆ = you have completely prepared this item. If completing the worksheet on paper, colour in the stars. If completing it digitally, delete stars until the remaining number reflects the level of importance.

Notes: Use this space to capture ideas, concerns, tasks, accountable people, or questions related to each topic.

Topic Area	Status	Notes
<p>Decision-making</p> <p>Do you have a clear, step-by-step process in place that outlines how decisions will be made? Has this process been communicated to the team?</p>	<p>☆☆☆☆☆</p>	<p>-</p>

Topic Area	Status	Notes
<p>Commitments</p> <p>Do you have an itemized list of commitments made to community members, funders, and other partners?</p>	☆☆☆☆☆	-
<p>Benefits</p> <p>Do you have a prioritized list of potential community benefits? Is the list sufficiently detailed to identify the optimal and minimum requirements for those benefits? Back-ups to the initial proposals?</p>	☆☆☆☆☆	-
<p>Non-Negotiable</p> <p>Do you have a list of “no-go” items? Are certain impacts unmitigable?</p>	☆☆☆☆☆	-

Topic Area	Status	Notes
<p>Details at your Fingertips</p> <p>Is your project background organized in a way that supports the discussion of the project in different phases and at key inflection points?</p> <p>Is the community engagement and supplemental research organized to support rapid searches and retrieval?</p>	<p>☆☆☆☆☆</p>	<p>-</p>
<p>Tracking and Enforcement Provisions</p> <p>Do you have a list of monitoring and enforcement approaches that align with the priority community benefits and the project design?</p>	<p>☆☆☆☆☆</p>	<p>-</p>
<p>Negotiation Strategy</p> <p>Do you have background and a strategy for engaging each party that will be part of the CBA? Your Power Map can fill this need.</p>	<p>☆☆☆☆☆</p>	<p>-</p>

Topic Area	Status	Notes
<p>Professional Support</p> <p>Do you have access to Independent Legal Services? Do you have paralegal and other professional support?</p>	☆☆☆☆☆	-
<p>Paid Professional Help</p> <p>How will the Legal, Research, and Technical Advisory Teams be funded? Does funding impact the timeframe of the negotiations?</p>	☆☆☆☆☆	-
<p>Communication Plan</p> <p>Has your internal and external Communication Strategy been adjusted to meet your needs during the negotiation period?</p>	☆☆☆☆☆	-
<p>Clarity on Roles</p> <p>Has the Negotiation Team met and discussed how different tasks during the negotiation process will be undertaken, including note-taking, identifying key issue areas, and negotiating styles?</p>	☆☆☆☆☆	-