



UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

Washington, DC 20415

The Director

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Memorandum for Heads of Executive Departments and Agencies

From: Kiran A. Ahuja
Director

Subject: Guidance on Implementation of Labor-Management Forums: Executive Order on Scaling and Expanding the Use of Registered Apprenticeships in Industries and the Federal Government and Promoting Labor-Management Forums

Section 1 of the [Executive Order \(EO\)](#) on Scaling and Expanding the Use of Registered Apprenticeships in Industries and the Federal Government and Promoting Labor-Management Forums reinforces the policy of the Biden-Harris Administration to encourage union organizing and collective bargaining. It notes that “[l]abor-management forums, as complements to the existing collective bargaining process, allow managers and employees to collaborate in order to continue to deliver the highest quality goods and services to the American people.” It further provides that it is the policy of the Biden-Harris Administration “to establish cooperative and productive labor-management relations throughout the executive branch.”

Section 6 of the [EO](#) requires implementation of labor-management forums throughout the Executive Branch to be consistent with any guidance provided by OPM. OPM is issuing this guidance to help agencies and unions implement the labor-management forum requirements, including allowing employees and their union representatives to have pre-decisional involvement on workplace matters, as set forth in the EO. While this guidance is not designed to be all-inclusive or to be construed as the “only” approach, we believe it will be helpful to agency and union representatives in establishing a cooperative and productive form of labor-management relations throughout the executive branch. This guidance does not cover matters on scaling and expanding the use of registered apprenticeships discussed elsewhere in the [EO](#).

Revocations

Section 6(a) of the [EO](#) revokes [EO 13812](#) of September 29, 2017 (Revocation of Executive Order Creating Labor-Management Forums). EO 13812 was perceived to be an obstacle to the creation of labor-management forums.

Implementation of Labor-Management Forums Through the Executive Branch

In support of the policies of the [EO](#) and consistent with the attached OPM guidance, agencies should work with their union representatives and take the following actions at the earliest opportunity:

- (1) Establish Labor-Management Forums by creating joint labor-management committees or councils at the levels of recognition. Forums may be established at other appropriate levels agreed to by labor and management;
- (2) Allow employees and their union representatives to have pre-decisional involvement in workplace matters, including discussions with management for the development of joint solutions to workplace challenges;
- (3) Evaluate and document, in consultation with union representatives and consistent with the attached OPM guidance, changes in employee satisfaction, manager satisfaction, and organizational performance (including organizational health) resulting from Labor-Management Forums; and
- (4) Prepare and submit, in consultation with union representatives, within 180 days of the date of the order, a written implementation plan to OPM where there exists one or more exclusive representatives, consistent with the attached OPM guidance.

The attachments provide additional guidance for Federal agencies and unions on the above actions which support the Labor-Management Forum policies of the [EO](#).

Additional Information

Agency headquarters-level human resources offices and national unions may contact OPM at awr@opm.gov with additional questions. Agency field offices and local unions should contact their appropriate headquarters-level agency human resources offices.

cc: Chief Human Capital Officers (CHCOs), Deputy CHCOs, and Human Resources Directors

Attachments:

Appendix A: Creating Labor Management Forums

Appendix B: Additional Guidance on Establishment of Labor-Management Forums

Appendix C: Guidance for LMF Metrics

Appendix D: Timeframes and Key Actions for Implementation of LMF Requirements

Appendix A: Creating Labor Management Forums

Labor Management Forum Requirements

Labor-Management Forums (LMFs) allow managers and employees' union representatives to discuss how Federal Government operations can promote satisfactory labor relations and improve the productivity and effectiveness of the Federal Government.¹ Section 6(b) of the [EO](#) provides that each Labor-Management Forum agency², consistent with any guidance provided by OPM, shall:

1. establish LMFs³ by creating joint labor-management committees or councils at the level of recognition and other appropriate levels agreed to by the union and management, to help identify problems and propose solutions to better serve the public and agency mission;⁴
2. allow employees and their union representatives to have pre-decisional involvement in workplace matters, including discussions with management for the development of joint solutions to workplace challenges; and
3. evaluate and document, in consultation with union representatives and consistent with any further guidance provided by the Office of Personnel Management (OPM), changes in employee satisfaction, manager satisfaction, and organizational performance⁵ resulting from the LMFs.

Section 6(c) provides that each head of Labor-Management Forum (LMF) agency for which there exists one or more exclusive representatives, as defined in 5 U.S.C. 7103(a)(16), shall, in consultation with union representatives, prepare and submit for approval, within 180 days of the date of the [EO](#), a written implementation plan to OPM. OPM requests each LMF agency plan to:

¹ The EO also requires an interagency working group to convene and issue an initial report to the President with findings and recommendations regarding Registered Apprenticeship programs. This guidance does not address matters related to Registered Apprenticeship programs and is focused on the EO requirements for labor-management forums and use of pre-decisional involvement on workplace matters.

² Section 2(g) of the EO defines "Labor-Management Forum agencies" to mean all agencies subject to chapter 71 of title 5, United States Code.

³ For ease of reading OPM's guidance, all references to labor-management forums, councils, or committees will simply be referred to as LMFs as these terms can be used interchangeably.

⁴ Section 7(a) of the EO states "[t]his order supersedes Executive Order 13522 of December 9, 2009 (Creating Labor-Management Forums to Improve Delivery of Government Services)."

⁵ Organizational performance includes organizational health.

- describe how the agency will work with the exclusive representatives of its employees to conduct a baseline assessment of the current state of labor-management relations within the agency, including assessment of any outstanding issues regarding implementation of [EO 14003 \(Protecting the Federal Workforce\)](#) and [OPM’s guidance related to implementation of EO 14025 \(Worker Organizing and Empowerment\)](#)⁶, in any bargaining units within the agency;
- report the extent to which the agency has already established LMFs at the levels of recognition and, if agreed to by labor and management, at other appropriate levels, or adapting existing councils or committees if such groups exist;
- address how the agency will evaluate and document, in consultation with union representatives and consistent with any further guidance provided by OPM, changes in employee satisfaction, manager satisfaction, and organizational performance (including organizational health) resulting from the Labor-Management Forums; and
- explain the agency plan for devoting sufficient resources to the implementation of the plan, including sufficient resources to create and operate LMFs.

Next Steps for Agencies and Unions – Creation of Implementation Plans

As noted above, Section 6(c) of the [EO](#) requires agencies to prepare and submit, in consultation with union representatives, within 180 days of the date of the [EO](#), a written implementation plan to OPM. The written implementation plan should be a consolidated plan which covers all bargaining units in the Department or agency.⁷ The purpose of the implementation plan is to affirm the creation of the LMF(s) and to create a guide for the evolving relationship. The implementation plan serves as a roadmap for the parties as the relationship moves forward. It is not a contractual document between the participants, and it is not intended to modify any of the existing collective bargaining agreements between the parties or for either party to waive their rights under the law.

⁶ EO 14003 and EO 14025 are critical components of the Administration’s policies supporting collective bargaining, worker organizing and empowerment. To the extent there are outstanding implementation issues, these are ideal issues for labor-management forums to address and should be addressed for successful implementation of LMF requirements.

⁷ Some agencies have multiple bargaining units involving different unions. OPM is not requesting implementation plans for each bargaining unit. Agencies and unions may elect to submit plans that provide a framework for all bargaining units in the agency while allowing local management and local unions to establish more comprehensive plans that meet their needs and which do not need to be submitted to OPM.

While OPM is not prescribing a specific format for implementation plans, each plan should clearly answer the following questions:

1. How will the agency work with the exclusive representatives of its employees to conduct a baseline assessment of the current state of labor-management relations within the agency? Where appropriate, please report to the extent the agency has already established LMFs for all exclusive representatives which wish to participate in labor-management forums.
2. What are any outstanding issues regarding implementation of EO 14003, Protecting the Federal Workforce? This includes any outstanding issues on compliance with Section 4 of EO 14003 regarding collective bargaining on matters covered by 5 USC § 7106(b)(1). Please identify agency location, name and local or chapter number of union, and bargaining unit status (BUS) code(s) of union(s) involved.
3. What are any outstanding issues regarding implementation of OPM guidance for EO 14025, Worker Organizing and Empowerment? Please identify agency location, name and local or chapter number of union, and any BUS code(s) of union(s) involved. OPM's guidance for EO 14025 includes:

[Highlighting Bargaining Unit Employee Rights in the Hiring and On-boarding Process | CHCOC](#) – October 20, 2021

[Guidance on Implementation of EO 14025: Highlighting Bargaining Unit Employee Rights to Join a Union and Other Rights | CHCOC](#) – October 20, 2021

[Guidance on Implementation of EO 14025: Highlighting Requirements During Union Organizing | CHCOC](#) – April 12, 2022

[Guidance on Implementation of EO 14025: Highlighting Union Rights to Access and Communicate with Bargaining Unit Employees | CHCOC](#) – April 12, 2022

[Guidance on Implementation of EO 14025: Highlighting Requirement to Timely Process Requests for Payroll Deductions for Labor Organization Dues | CHCOC](#) – April 12, 2022

[Guidance on Implementation of EO 14025: Addressing Whether Non-Bargaining Unit Positions are Correctly Excluded from Bargaining Unit Coverage | CHCOC](#) – January 26, 2023

4. How will the agency work with the exclusive representatives through its LMFs to develop agency or bargaining unit specific metrics to monitor changes in employee satisfaction, manager satisfaction, and organizational performance (including organizational health) resulting from the LMFs?
5. How will the agency devote sufficient resources to the implementation of the plan, including sufficient resources to create and operate LMFs?

Written implementation plans must be submitted to OPM within 180 days of the date of the [EO](#). The EO was issued on March 6, 2024. Since 180 days falls on a federal holiday, agencies should submit their plans to OPM by close of business, Tuesday, September 3, 2024. Plans may be sent to AWR@opm.gov.

Section 6(c) of the [EO](#) provides that OPM shall review each implementation plan within 60 days of receipt to determine whether to certify that the plan satisfies all requirements of the EO. Plans that are determined by OPM to be insufficient will be returned to the agency with guidance for improvement and resubmission within 30 days and after consultation with union representatives, unless OPM authorizes an extension of the deadline.

Extension requests may be sent to AWR@opm.gov.

Appendix B: Additional Guidance on Establishment of Labor-Management Forums⁸

General Considerations

No two federal agencies are alike, and the same is true of the relationships between agencies and their unions. Each LMF will develop its own goals and adopt its own implementation plan for success. While one size does not fit all when it comes to creating an LMF, the following strategies may assist in successful labor-management cooperative efforts:

Meetings

The participants' first endeavor will be to jointly design the LMF for sustainable success. This will require the development of a shared vision for the future of their relationship and how the LMF will enable them to achieve that desired future state. All participants are best served by refraining from "win-lose" positioning. Instead, they should look for "win-win" opportunities that balance common interests and mutual goals capable of driving agency success.

Provide Top-Down Support Driven by Agency Head and Union Leadership

The success of any LMF depends largely on the visible commitment, endorsement, and involvement of leaders within the agency and the union. Top agency and union leaders should be actively involved and model the behaviors they expect from others. Their participation has to be genuine. Both parties must realize that LMFs are a tool of cultural transformation and results may take some time. But real change may never happen unless top agency and union leaders are visibly and actively leading the way. The support of top leaders sets the stage to change behavior and drive results through the entire organization.

Recognize Labor-Management Forums Are Not Co-Management Arrangements

In creating LMFs, department and agencies must recognize that some managers, union leadership, and employees may disapprove of and resist this effort. Previous attempts at Labor-Management partnerships sometimes have been criticized as "co-management arrangements," typically by individuals who firmly believe that management and unions

⁸ This information is based on OPM's prior experiences on supporting agencies and unions in establishing LMFs or equivalents under EO 12871 and EO 13522.

are adversaries. It is critical for the LMF to address these concerns early, with firm resolve and with a clearly articulated value proposition that answers the question, “What’s in it for me?,” for all stakeholders. In this process, management still manages, and unions still represent the interests of bargaining unit employees; however, both parties make a cooperative effort to address mutual interests in solving workplace problems and improving the organization.

Use of Pre-Decisional Involvement in LMFs

Pre-decisional involvement, or PDI, is a key component of the EO. The EO envisions employees and their union representatives as stakeholders whose viewpoints and input should be obtained in a collaborative labor-management engagement process before agency leaders make decisions which impact conditions of employment and which would normally be subject to collective bargaining. PDI topics may include the full range of management initiatives which impact employees in the workplace. While PDI should not be limited to the LMF, the forums may be a way for parties to engage and discuss those topics.

PDI can provide benefits to all parties involved: bargaining unit employees, unions, and management. Bargaining unit employees and their union representatives are provided an opportunity to participate in and have meaningful input into agency decisions concerning a broad spectrum of workplace issues and topics before decisions are made. Past experiences show that a successful PDI can foster employee engagement and reduce the likelihood of disputes between unions and their agency counterparts regarding employment issues, with the goal of reaching better solutions that impact the workplace.

PDI also provides agency decision-makers with an invaluable source of information from employees on the agency’s front line and their union representatives. Agency decision-makers who incorporate this rich set of information into their decision-making model can make better, customer-centric decisions about the delivery of government services to the American people.

PDI complements the collective bargaining process but does not replace it. However, if both parties are pleased with a resolution reached through PDI, further bargaining may not be necessary. This depends on several factors, including the type of issue addressed through PDI and especially the parties’ shared understanding of the relationship between PDI and collective bargaining.

It is imperative that before engaging in PDI, the parties discuss and reach a common understanding of the relationship between PDI and collective bargaining. PDI through an LMF is intended to be a collaborative, interest-based decision-making process, but PDI may also satisfy the obligation to bargain, depending on the circumstances. Determining whether the obligation to bargain has been satisfied is within the jurisdiction of the Federal Labor Relations Authority.

If either party requests, the Statute requires that the parties execute a written document embodying the agreed terms. Use of PDI does not mean an agency must sign a collective bargaining agreement with nonnegotiable provisions.⁹ Likewise, use of PDI does not mean that a union waives its collective bargaining rights under 5 USC Chapter 71.

PDI works best when the agency and union use collaborative approaches, such as interest-based problem-solving, including a thorough and detailed discussion of each party's interests. If either union or management representatives have not had experience with collaborative or consensus-based decision-making processes, it is recommended that they engage in joint training. It may also be helpful to obtain the services of a facilitator to guide them through the PDI process.

Ensure the Right People Are Included in the Labor-Management Forum

An LMF is only as good as the mix of its members and the quality of their participation. Its composition sends clear messages about the commitment of the agency and union leadership to the process. LMFs should be developed at the level of recognition within the organization. Both the union and management have common interests and needs that will have to be accommodated in creating effective forums.

LMF members should be willing participants who are energized about working together to achieve results that matter to the agency and its employees. Participants should bring a positive attitude and a willingness to engage in honest, open communication that involves speaking freely and listening actively. In most cases, this process takes time and will require commitment and patience on the part of all LMF members.

⁹ PDI is an opportunity for a union to influence a management decision on policy impacting the bargaining unit. Even with matters covered by management rights under 5 U.S.C. 7106, management can still engage unions in substantive discussions about the policy and consider the union's input before making any management decision that involves exercising a management right. Management still retains the right to make the decision but should do so with input from the union. However, collective bargaining agreements are still limited to negotiable matters.

Create a Shared Vision for the LMF

All LMFs should be built around a shared vision for the future of the parties' labor-management relationship and a common understanding of how the LMF will help them achieve results for the Agency and its employees. While the initial catalyst for change is the issuance of the EO, acting simply because the approach has been ordered is not enough.

Agency and union leadership must understand the purpose of the LMF and have confidence that it will yield tangible results. Answering the following questions can help the parties develop that common understanding:

- What is the current state of the agency's labor-management relationship?
- How can the LMF help the agency meet its mission?
- How can the LMF harness the great ideas, creativity, technical expertise, and engagement of the workforce?
- How can the parties create mutual commitment to build a relationship that resolves disputes more constructively?

Available Resources and Training

OPM encourages unions and management to collaborate and utilize the expertise of the Federal Mediation and Conciliation Service (FMCS) and the Federal Labor Relations Authority (FLRA) in establishing labor management forums, committees, or for skills training.

The FLRA's Collaboration and Alternative Dispute Resolution Office (CADRO) is available to provide consultation, guidance, and joint-training for management and union representatives who want interactive assistance with their labor-management forum and PDI initiatives. CADRO also can link parties to other appropriate resources if necessary. FLRA's Office of General Counsel can offer training on parties' rights and obligations under the Federal Service-Labor Management Relations Statute and has released video training on many subjects, including training on labor-management forums found here: [Video Training | FLRA](#).

FMCS is a key provider of training, both basic training on labor-management forums (including at conferences and with the FLRA), as well as training based on a needs assessment of specific parties. FMCS's LMF training can be tailored for new labor-

management forums, inactive labor-management forums, and those who want a more productive labor-management forum.

FMCS is available to provide training and facilitation for all aspects of the collective bargaining relationship, including:

- Bargaining training (including collaborative bargaining training);
- Relationship development training (including effective contract administration, effective communications, and repairing broken relationships);
- Collective bargaining mediation; and
- Facilitating a bargaining debrief to improve bargaining for the next round of bargaining, as well as the overall labor-management relationship.

Parties may contact FMCS through its Office of Client Services at clientservices@fmcs.gov. Additional information on FMCS resources can be found here:

- [LMC-LMF Partnerships - Federal Mediation and Conciliation Service](#)
- [FMCS Partnerships Brochure](#)

OPM's Accountability and Workforce Relations office is available to provide policy and technical guidance to parties as they take steps to implement the Executive Order requirements. Parties may send an email to awr@opm.gov.

Appendix C – Guidance for LMF Metrics

Section 6(b)(iii) of the EO directs agencies to evaluate and document, in consultation with union representatives and consistent with any further guidance provided by OPM, changes in employee satisfaction, manager satisfaction, and organizational performance¹⁰ resulting from the LMFs. LMFs can develop metrics to meet these requirements. OPM recommends that metrics be practical and easily understood. If they require a lot of explanation and definition, then turning data into action becomes more difficult. Examples of possible metrics¹¹ include, but are not limited to:

1. labor-management satisfaction;
2. productivity gains;
3. cost savings; and
4. other areas as identified by the relevant labor-management forum’s participants.

Goal and Metrics Development, Data Collection, and Reporting Mechanisms

LMFs should begin by identifying an issue (or issues) to focus on for improvement and for which it will jointly develop actions or steps to be taken to make these improvements.¹² Once identified, the next steps and actions to be taken on each issue should be to identify the metrics to use, monitor the progress for implementing suggested actions, and assess the impact of those actions.

LMFs should report identified issues, goals, and metrics to their agencies and update their agencies on the data collected at least annually thereafter. Agencies should report annually on the metrics they receive from their LMFs to OPM. Within 60 days of receiving approval of their implementation plan, agencies should report to OPM on the measures that will be included in their baselines. Each year, OPM will request agencies provide agency progress against their metrics.

Labor-Management Satisfaction Suggested Metric

The EO aims to promote satisfactory labor relations. The goal of this suggested metric is to chart changes in labor-management relations resulting from the LMF.

¹⁰ Organizational performance includes organizational health.

¹¹ These categories are suggested metrics which have been used by parties over the years.

¹² To the extent agencies are already working with unions regarding any goals and strategies which support the [President’s Management Agenda](#) (PMA), LMFs may wish to consider focusing on any metrics identified for the PMA.

Guidelines

It is noted that both purely statistical information as well as anecdotal evidence concerning the state of labor-management relations is relevant in assessing whether relationships have improved. Accordingly, information reported to OPM may include such anecdotal evidence where the LMF participants agree that it is instructive, and the parties elect to use this metric category.

Descriptive Information

This data may be collected at the forum levels where specific labor-management relations issues are identified and resolved. Such resolution can include collective bargaining agreements and should also include general policy determinations that are developed through the collaborative efforts of labor and management at a forum. Accordingly, this data could be collected for each LMF at all levels where LMFs exist within an agency.

Data could be tracked with respect to each issue on which pre-decisional involvement was provided by or through the LMF, only select issues, or any other issues deemed appropriate. For example, the data could include the following:

1. The issue or issues identified, including the significance of the issue -- i.e., costs, number of employees impacted, impact on mission performance or delivery of services.
2. The date the issue is identified.
3. The date the issue is resolved (if at all).
4. If the issue is resolved, describe the nature of the resolution (i.e., collective bargaining agreement, a resolution, or plan).
5. At what level was the issue resolved (i.e., LMF, bargaining teams, before a third party such as an arbitrator, FLRA, EEOC, or MSPB).
6. If the issue was not resolved, provide an explanation of why the issue was not resolved.
7. If the issue was not resolved, describe the way the issue was addressed (i.e., whether through traditional bargaining, or was third-party assistance necessary).
8. Resources associated with addressing issue (i.e., timeline, money, staff).

Subjective Information

This data may also be collected from a survey provided to both union and management representatives. If the parties elect to do a survey, participants should include those with a role in Employee/ Labor Relations, such as supervisors/managers, HR specialists and attorneys who handle labor and employee relations matters for the agency, and union officials/representatives. Ideal measurements could evaluate:

1. Whether pre-decisional involvement has occurred.
2. Whether labor and management have a productive relationship.
3. Whether information is shared and available to both parties.
4. Whether there is organizational support for labor-management relations.
5. Whether bargaining/negotiations are effective.

In formatting survey questions, areas may include the following: (1) general labor-management interactions; (2) nature of dispute resolution -- i.e., the grievance process; (3) negotiations; and (4) general suggestions for improving labor-management relations. Sample questions in each area are included later in this guidance.

Productivity Gains Suggested Metric

The focus of metrics in this suggested category is evaluating and documenting changes in results achieved, specifically whether the forum is contributing to improved mission achievement, service quality, or cost-effectiveness. In many cases, agencies may have already developed metrics for evaluating mission achievement, service quality, or cost-effectiveness through their strategic plans. The LMF may decide to use existing metrics, as appropriate, or may develop new metrics that are more relevant to the issues being addressed.

Varied Missions, Varied Measures

Selections could be made from the following categories:

1. General or Specific Outcomes
2. Process / Cycle time
3. Error Rate / Quality
4. Public Responsiveness / Problem resolution / Customer Satisfaction
5. Internal Resource Management
6. Revenue Collected
7. Agility
8. Other

Definitions and examples of these metrics include, but are not limited to:

1. **General or specific outcomes** – These metrics include broad deliverables to outside stakeholders that employees and management may collaborate to achieve. Labor and management may find it useful to specify a subset of people or businesses that will be the focus of the forum’s attention.
2. **Process / Cycle Time** - These metrics gauge progress streamlining or otherwise improving internal processes to achieve better cycle times.
3. **Error Rate / Quality** – Attention to error rates and other aspects of quality when focusing on improving processes and efficiency, ensures that acceptable quality is not sacrificed for speed or cost reductions.
4. **Public Responsiveness / Problem resolution / Customer Satisfaction** – Every Federal government organizational unit deals with individuals and groups of people outside the organization and addressing their needs can be paramount to organizational success. Establishing public responsiveness metrics to gauge whether government is meeting the needs of outside stakeholders is particularly important for dealing with issues where there is direct contact with customers.

5. **Internal Resource Management** – These measures improve internal agency resource management to serve the needs of internal stakeholders and to improve transactions with suppliers or delivery partners.
6. **Revenue Collected** – These metrics are only applicable where participants are involved in collecting revenue but can be important indicators supporting mission success.
7. **Agility** – These metrics are focused on the ability to make decisions and execute plans and strategies requiring short turn-around collaboration, to quickly implement the agreed-to solution. For example:
 - The number of days it takes to decide on a new telework policy.
 - The number of meetings required to change the procedure for approving annual leave.

While the above categories have common attributes across organizations, some metrics may be specific to the mission of an individual organization. LMFs are encouraged to create relevant specific metrics even if they don't fall into any other categories but are reflective of accomplishing the mission of many participants.

Cost Savings Metric

Finding ways to cut costs while keeping outcomes and service quality high is always important. Each LMF is encouraged to quantify costs to find ways to reduce the cost of effective program and mission delivery practices and increase the return on government investment.

Sample Questions for Assessing the Labor-Management Relationship

In formatting survey questions, we recommend exploring areas that include five areas included below. Sample questions in each area have also been provided and are not meant to be an all-inclusive list of questions or areas to cover.

Possible Work Unit Discussions Questions

Work Unit is defined as your immediate work unit headed by an immediate supervisor. These can be questions about workplace issues between union and management, in a work unit.

In my work unit, within the last six months, union representatives and management have met to discuss workplace matters:

- 0 times
- 1-2 times
- 3-4 times
- 5-6 times
- 7 or more times
- I do not know how often meetings have occurred

The subjects discussed during formal meetings are important to my work unit:

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
- I Don't Know

Agendas are typically sent out in advance for each formal meeting.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
- I Don't Know

I am comfortable voicing opinions or asking questions during the meetings.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
- I Don't Know

Possible General Discussions Questions

General: Possible questions about union and management relations, covering several different areas.

Together labor and management address issues relevant to the organization's business and mission.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
- I Don't Know

Labor-Management Forums or Committees can positively impact mission accomplishment.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
- I Don't Know

I have been provided formal training on collaborative labor-management relations.

- Yes (please provide an approximate date)
- No

Management keeps union representatives aware of potential changes to employees' working conditions.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
- I Don't Know

Open communication between union representatives and management officials exists in my organization.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
- I Don't Know

A sense of fairness is associated with labor-management dealings.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
- I Don't Know

Possible Grievance Process Discussions Questions

The Grievance Process: Possible questions about the negotiated grievance process.

In the last year, how many grievances have

- Been filed in your work unit: ___ (number) -or- I don't know
- Reached the last step in the grievance process: ___ (number) -or- I don't know
- Gone to arbitration: ___ (number) -or- I don't know

In general, both parties work cooperatively during the grievance process.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
- I Don't Know

The grievance process is an efficient way to resolve conflicts.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
- I Don't Know

Possible Negotiations Discussions Questions

Negotiations: Questions about perceptions regarding negotiations between labor and management.

Management and union representatives regularly engage in “good faith” negotiations.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
- I Don't Know

The process for negotiating a collective bargaining agreement is effective.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
- I Don't Know

Appendix D – Timeframes and Key Actions for Implementation of LMF Requirements

When	Who	What	Reference
Within 180 days of the date of the EO.	Agency, in consultation with union representatives	Prepare and submit a written implementation plan that addresses the requirements in subsection (b) of Section 6 of the EO.	Section 6(c) of the EO.
Within 60 days of receipt of agency implementation plan	OPM	Review each Labor-Management Forum agency implementation plan and determine whether to certify that the plan satisfies all requirements of the EO and any further guidance provided by OPM.	Section 6(c) of the EO.
Within 30 days of OPM notifying an agency that an implementation plan is insufficient (unless OPM authorizes an extension of the deadline)	Agency, in consultation with union representatives	Considering OPM's guidance for improvement, resubmit revised implementation plan.	OPM's guidance issued pursuant to Sections 6(b) and (c) of the EO.