

OFFICERS' MEETING AGENDA

January 26, 2016, Start Time: 6:00PM

Call to Order – Gwyn Harshaw, President - 6:00PM – Open Forum Meeting starts at 6:00pm. The first 15 minutes may be used for an open forum for members who wish to comment on issues of concern or describe union victories in their workplace (maximum of 2 minutes addressing items not on the agenda except under special circumstances). Meeting will start when all speakers are completed or at 6:15 whichever comes sooner. If members arrive before 6:15 and the general meeting has begun, it will be suspended for the members' comments. If Board action is requested, the Board may place the matter on a future agenda. All statements that require a response will be referred to staff for reply in writing.

Responses to Last Officers' Meeting Open Forum Issues

1. None

Roll Call – 6:15PM quorum determined - (Karen Nakatani)

Announcements:

1. Executive Session at end of meeting – OPEIU Issues; Region 2 Transit Issue.

REPORT CONSENT AGENDA: If there is anything you wish to discuss prior to approval of Motion A, please pull the item from the Agenda for discussion. What is not pulled from the Consent Agenda is considered approved without discussion when Motion A is passed.

Motion A – Report Consent Agenda Approval - (pages 3-4)

1. Approval of Officers' Meeting Minutes – October 27, 2015 - (pages 5-8)
2. Reports on Officers' Email Motion Poll December 23, 2015
3. Budget & Finance Committee Reports – January 20, 2016 – October and November 2015 Financials - (pages 9-34)
4. Good & Welfare Committee Expenditures Report – December 2015 & January 2016 – none

Any Requests for Assistance – please send them to both RoseAnn

Dominguez at ruth.pern@hotmail.com and Karen Summers at karen.summers@seiu521.org

Written Reports & Correspondence Requiring no Action by the Officers – They may be pulled for discussion if desired.

1. Officers' Reports
 - 1st Vice President Report - (none)
2. Election Report – Pam Rodgers - (pages 35-54)
3. PAC/PAC Totals Report - (pages 55-56)
4. Trustee Report - (none)
5. Correspondence
 - Thank you from Working Partners for donation and our continued support - (pg 57)
 - Thank you from Yang Xiong, Executive Director of SouthEast Asian Assistance Center for our donation to their organization - (page 58)

Motion B – Political Consent Agenda B/1 – B/3 - (pages 59-66)

Report From the National SEIU Political Dept.: Plan for the 2016 Presidential Race – Brian O'Neill

Items Pulled from the Consent Agenda or the Report Consent Agenda

1. Pulled Items from the Consent Agenda
2. Pulled Items from the Report Consent Agenda
3. Other Oral Reports

President’s Report: President Gwyn Harshaw

1. Oral Report - (oral)

Chief Elected Officer Report: Luisa Blue

1. Any Updates - (oral)
 1. Friedrichs v CTA Supreme Court Case (a good article capturing the case) - (pages 67-70)
 2. International Executive Board Report - (pages 71-80) and (other documents separate from packet)
 3. UNITE FIGHT WIN Year in Review 2015 - (documents only for your review) - (pages 81-88)
 - 4.

Unfinished Business

- 1.

New Business

1. **Motion C – Approval of Vendor for the Local’s Tele-Town Hall Meetings in 2016** - (pages 89-90)
2. **Motion D – Recording Policy for SEIU Local 521-** (pages 91-92)

Informational Items

1. President Obama’s Statement on the San Bernardino Shooting for the Community Candlelight Vigil on December 7, 2015 in San Bernardino - (pages 93-94)
2. Mary Kay Henry letter to President Obama regarding INS raids and deportation - (pages 95-96)

Adjournment

LB: kns SEIU 521 CTW/CLC

SEIU Local 521 Officers' Meeting Motion

* **Motion Letter: A**

Date: January 26, 2016

Motion Title: Report Consent Agenda

The Following Reports have been placed on the REPORT CONSENT AGENDA for approval/confirmation without discussion. If you wish discussion pull the report from the REPORT CONSENT AGENDA –

NO Motion is required to remove a report from the Report Consent Agenda.

Committee Reports Requiring Approval/Confirmation: (as noted below)

1. **Approval of the Minutes for the Officers' Meeting October 27, 2015** - (pages 5-8)
2. **Notification of Officers' Email Poll Motion Regarding an emergency Staff cash out on 12/23/15. Approved – voting yes: Karen Nakatani, Alysia Bonner, John Gutierrez, RoseAnn Dominguez, Muriel Frederick; Matt Nathanson on vacation, Gwyn and Luisa do not vote.**
3. **Budget & Finance Committee Report** – RoseAnn Dominguez, Local 521 Treasurer
January 20, 2016 Meeting – The Committee reviewed the October and November 2015 Financials and 2015 Budgets. - (pages 9-30)
 - B&F Item 1 – Approved - The October and November 2015 Financial Documents
 - B&F Item 2 – Withdrawn - Vendor for the TeleTown Hall Meeting Events in 2016. Will be heard at the January Officers' Meeting.
 - B&F Item 3 – Withdrawn – Policy Regarding Submission of Motions, Information, and Reports for Budget & Finance, Officers', Executive Board Meeting Agendas..
Signed Motions - (pages 31-34)
4. **Good and Welfare Committee Report** – donations in December 2015 & January 2016: None
 - Please submit all Good & Welfare requests to both RoseAnn Dominguez and Karen Summers.

* **Motion A:** To approve/confirm as presented **ALL Reports** on the Report Consent Agenda **EXCEPT** those pulled and listed below which will be held for discussion:

Follow Up:

Moved by: _____ Second : _____

Pulled: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures



Minutes October 27, 2015 – Officers’ Meeting

Call to Order: by President Gwyn Harshaw at 6:08pm.

Officers Roll Call in Attendance on Video Conference or Teleconference:

Gwyn Harshaw	President	Luisa Blue	CEO
RoseAnn Dominguez	Treasurer	Matt Nathanson	Region 2 VP
Karen Nakatani	Secretary		

Officers Absent:

Muriel Frederick	Region 1 VP
John Gutierrez	First VP Pres
Alysia Bonner	Region 4 VP

Executive Board also in attendance on Video Conference or Teleconference:

Via Cooper-Whigham Fresno

Local 521 Trustees on Video Conference or Teleconference:

Connie Chew	San Jose
Bill Ragland	Salinas

Local 521 Staff on Video Conference or Teleconference:

Pam Rodgers	San Jose
Karen Summers	Salinas

Local 521 Members in Attendance:

None

Guests:

None

Open Forum for Member Presentations:

1. None

Responses to Last Month’s Open Forum Issues:

None.

Roll Call and Quorum Determination: A quorum of Officers was confirmed as present at 6:08pm.

Announcements:

1. This reminder was pointed out and discussed: **REMINDER:** The election of all Executive Board positions will in January of 2016 with requirements beginning the end of November beginning of December. On the ballot will be any Bylaws Amendments that are recommended by a 2/3 vote of the Executive Board or a petition in favor of a proposed amendment with valid signatures of ten percent (10%) of Local members

submitted to the Local President. If you have any proposed Amendments please get your wording to Pam Rodgers ASAP so they can be evaluated by the Localwide Bylaws Committee and presented to the Executive Board at the September Executive Board Meeting.

2. Today started the petition period for Nominations for Executive Board positions. The petition period is October 27 – November 23, 2015. The Nomination Meeting will be November 12, 2015.
3. There will be Executive Session at the end of the meeting.
4. The quarterly audit will be Saturday November 14, 2015 in the Finance Department. If you wish to volunteer please contact Ming.

Report Consent Agenda:

Motion A – Report Consent Agenda Approval/Confirmation.

Motion: To approve as presented without discussion the following items listed on the Report Consent Agenda.

1. Minutes of the August 25, 2015 Officers' Meeting
2. Report of Officers Email Poll Motion Passed September 30, 2015, regarding problem with a decert attempt. Yes votes: RoseAnn Dominguez, John Gutierrez, Matt Nathanson, Karen Nakatani, Alysia Bonner, Muriel Frederick.
3. Report of Officers Email Poll Motions Passed October 23, 2015
 - B/3 – City of San Mateo Measure S - \$1,000
 - B/4 – Endorse and \$1,500 support for James Hackett for FCERA Trustee
 - B/5 – 4 tickets to the 4th Annual Kiwanis Angel Awards Event - \$150
 - B/6 – Endorse and \$1,500 Support for Regina Kane for Board Member of Kern County Employee Retirement Association.Yes votes: RoseAnn Dominguez, Alysia Bonner, John Gutierrez, Muriel Frederick, Matt Nathanson, Karen Nakatani.
4. Budget & Finance Committee Report from the October 21, 2015, Budget and Finance meeting - Treasurer RoseAnn Dominguez. RoseAnn confirmed that below is a true and accurate report of what had happened at the B&F meeting. The Committee reviewed the August, 2015, financials.
 - B&F Item 1 – Approved – the August 2015 Financials as presented.
5. The Good and Welfare Committee Report – donations for September/October 2015.
 - None
 - Note: Any requests for assistance should be emailed to both RoseAnn Dominguez at ruth.pern@hotmail.com and Karen Summers at karen.summers@seiu521.org.

Moved; seconded; passed as presented.

Written Reports & Correspondence Requiring no Action by the Officers

Officers' Reports

1st Vice President Report – none.

Education and Training Report - none

Organizing Report – in packet

Communications Report – none

IT Report – none

Admin/Building Report – none

PAC/PACE Totals Report – in packet

Trustee Report – none

Caucus Reports – none

Industry and Committee Reports – none

Correspondence – none

Political Consent Agenda Approval/Confirmation

All Political Motions were approved as presented without discussion on the Motion B Political Consent Agenda. No motions were pulled.

Motion B – Political Consent Agenda Approval/Confirmation

Motion: To approve/confirm as presented without discussion the following Motions:
Motions B - B/2

Moved; seconded; passed as presented.

Motion B/1 – Endorse Measures O and P in Santa Cruz County.

Motion: To Endorse Measures O and P in Santa Cruz County

Moved; seconded; passed as presented.

Motion B/2 – Contribution from Issues PAC for Yes on Measures O and P.

Motion: To contribute \$500 from the Issues PAC to Yes on O and P.

Moved; seconded; passed as presented.

Items Pulled from the Consent Agendas for Discussion - none and other oral reports:

None

President’s Report:

1. Will be given in Executive Session. It is on OPEIU Bargaining.

Chief Elected Officer’s Report: Luisa Blue

UNITE – FIGHT – WIN – *All in Together 4 Power Blitz:* Luisa reported that this is Day 6 and we are chugging along. It is too soon to tell how successful we will be. Some areas are not meeting their goals. Eileen Kerlin spent a day last week with Luisa. First they went to Social Services where abused kids are reported. It was severely understaffed and it was not possible to have significant conversations. They then went to the Hospital where workers got that “you contribute to COPE to protect your retirement”. Former San Jose Mayor Reed is trying to fight public sector pensions with ballot measures. Luisa also had a discussion with pharmacists with not suck positive results. There are over 100 staff, International staff, and volunteers helping us out with this Blitz.

1115 Waiver Update: This week is do or die. Either California will get full amount for 5 years or won’t. There have been issues and now California is not asking for the bare bones amount to fund the MediCal programs of \$7.5 billion for the full 5 years. Now the issues have to do with comparing California to Florida which is not good. This criticism doesn’t make sense because Florida didn’t even apply for Medicaid funding this time. Mary Kay and others are talking with heads of CMS to try to figure all this out. We will know by November 1st if we have reached a deal. Since now there is a budget it may be easier.

Luisa Honored by the Filipina Women's Network – 12th Annual Global Leadership Summit – 100 Most Influential Filipina Women in the World Award in the Visionary/PolicyMaker category: On Friday she will attend the Summit and receive the global award. The New President of the Asian Caucus received this award last year.

Organizing Plan and Budget: The SEIU Local 521 Organizing Plan and Budget has been submitted to the International for approval. They will review it sometime in November.

Unfinished Business:

None

New Business:

Motion C: Waiver to be a Life Member of the SEIU Local 521 Retiree Chapter:

Motion: To grant a waiver to Judith (Judy) Geer and allow her Life Member status because of her many years as an SEIU member and her desire to actively participate in the Retiree Chapter.

Duly moved; seconded; passed as presented.

Informational Items:

The Updated Lost Timer Policy – in the packet

Adjournment: The meeting was adjourned at 6:27pm. The Officers immediately went into Executive Session regarding several issues with final adjournment at 7:52pm.

LB: kns SEIU 521 CTW/CLC

	A	B	P	W	X
1	version 1.1		2014 - 12 months	2015 - 12 months	NOTES
2			Budget 2.2	Budget 1.1	
3	Headcount	TOTAL DUES RECEIPTS	30,439,600	30,878,626	
4	52,941	OTHER INCOME			
5		Interest & Dividends	3,600	1,515	
6		SMIHSS Administrative Reimbursement	-	-	
7		Sublease Rent	67,000	75,259	
8	B	Misc. Income - SEIU Int'l subsidy	-	-	
9	A	Misc. items spend from saving accounts			
10		Total Misc. Income	70,600	76,773	
11		TOTAL GENERAL FUND INCOME	30,510,200	30,955,399	
12		GENERAL FUND EXPENSES			
13		ORGANIZING OFFSET	4,025,172	4,199,761	
14		SALARIES			
15		5 Administrative	479,480	479,480	all positions filled
16		6 Admin Support	459,143	414,562	all positions filled
17		14 Directors	1,234,802	1,255,641	all positions filled
18		60 Internal Organizers/Research,CED,CESA,Pol	4,363,184	4,452,371	all positions filled
19		20 Clerical	1,090,419	1,053,009	all positions filled
20		2 Facilities	97,057	93,775	all positions filled
21		6 Data Base	301,619	328,091	all positions filled
22	A	Special project - pay by other funding	-		
23		Temp. Internal Organizers/Research	75,000	75,000	
24		Temp. Clerical/Support	20,000	20,000	
25		Vacation Liability Cash Out	400,000	119,756	cash out only
26		Total Salaries	8,520,705	8,291,685	
27		113 PAYROLL RELATED EXPENSES			
28		Pension	1,444,627	1,615,386	increase to 20% for 2015
29		Payroll Taxes Expenses	963,085	969,232	
30		Consultant - Trainer, NEG	30,000		
31		Travel Staff-Admin	50,000	44,761	
32		Travel Staff- Internal Organizers	120,000	189,440	membership drive
33		Mileage/Ins. Reimb.-Admin & Director	13,656	5,549	
34		Mileage/Ins. Reimb.-Internal Organizers	135,641	163,257	membership drive
35		Telephone Reimbursement	90,000	77,057	
36		13 Retiree Health Exp	108,930	112,658	
37		Retire Benefit Trust Fund	12	12	
38		Benefits(Health, Dental, Vision,life,401K,Flex	3,110,943	3,125,759	health benefit at new rate 2015
39		Workers Comp Insurance	280,900	242,308	
40		Recruiting exp	8,000	8,000	
41		Total Payroll Related Expenses	6,355,792	6,553,419	
42		Total Salaries & Payroll Expenses	14,876,497	14,845,104	
43		MISCELLANEOUS			
44		Agency Fee/Assoc. Exp.	504,000	720,000	same as 2014
45		Capital Fund Expense	12,000	12,000	same as 2014
46		Admin exp share w. chapter	12,000	12,000	same as 2014
47		Free Life insurance to members (SCR, MRY &	4,000	4,665	
48		Retired Chapter Fund Reimbursement		14,465	
49		Dodge Scholarship	15,000	15,000	same as 2014
50		Computer Database UnionWare	82,175	73,841	
53		Accounting Software Gp	12,000	12,000	same as 2014
54		MRC - IHSS - 4 months only			
55		Total Miscellaneous	641,175	863,972	
56					
57		ARBITRATIONS & LEGAL			
58	A	Arbitrations Fees & legal fees - representation	150,000	191,814	increase
60		Retainer	258,000	258,000	same as 2014
62	52,941	Automatic Legal Defense Fund (\$0.12 per mem	81,575	76,235	same rate as 2014
63		Total Arbitrations & Legal	489,575	526,049	
64					
65		FACILITIES			

	A	B	P	W	X
1	version 1.1		2014 - 12 months	2015 - 12 months	NOTES
2			Budget 2.2	Budget 1.1	
66		Rent-SJC	450,000	450,000	
67		Rent-RWC	58,000	48,000	new lease at RWC
69		Rent-Santa Cruz, Watsonville & Hollister & pa	47,000	39,900	
70		Rent-Visalia & Hanford	20,400	6,000	
71		Utilities	165,000	186,116	increase
72		Kitchen Sundries	50,000	48,260	same
73		Gen. Liab. Ins. & Property Tax	170,000	163,885	same
74		Building Maintenance/Security/Janitorial	180,000	202,571	increase HVAC & building maint.
75		Total Admin - Facilities	1,140,400	1,138,309	
76					
77		ADMINISTRATIVE - OFFICES			
78		Audit/Acct. Fees	110,000	110,000	
80		Subscriptions	4,000	2,597	
81		Office Sundries	70,000	90,524	
82		Office Equipment Leases	192,000	177,514	
83		Equipment Maintenance & Repair Contracts	70,095	59,220	
84		Contributions	3,000	5,067	
85		Research Material & Data	11,000	27,985	
86		Miscellaneous, off set by ORG		-	
87		Total Admin - Offices	460,095	472,907	
88					
89		COMMUNICATIONS			
90		Printing	42,000	28,729	
91		Paper	20,000	31,108	
92		Website/Station/communication	20,000	20,284	
93		Telephone & Internet & Tele conference	211,473	217,180	
94		Postage	60,000	112,381	rate increase in 2014
95		Professional Fees/Translations	5,000	3,372	
96		Total Communications	358,473	413,055	
97					
98		CONFERENCES/MILEAGE			
99		Staff-Misc. Conf/Seminar	3,500	3,500	
100		Exec. Board-Conferences & Training	30,000	30,000	
101		Misc. Members-Reimbursed	-		
102		Total Conferences/Mileage	33,500	33,500	
103					
104		STAFF MEETING & TRAINING			
105		Staff / Director Training	16,000	32,319	
106		Staff - representation & political & communicat	60,000	67,232	qtrly staff training
107		Clerical Staff	901	1,364	
108		Executive Staff	1,200	1,200	
109		Tuition Reim.-Internal Organizers	1,000	1,000	
110		Tuition Reim.-OPEIU	2,000	2,000	
111		Total Staff Training	81,101	105,115	
112					
113		EDUCATION & TRAINING			
114		Steward & Chief Steward & Leader Training	4,000	4,000	
115		Executive Board	500	500	
116		Education & Training Committee Meeting & Materials		-	
117		Industry Training Events	5,000	5,000	
118		Total Education & Training	9,500	9,500	
119	0				
120		POLITICAL/SOCIAL INVOLVEMENT			
121	43,305	Candidates, Issues, IE Account (\$0.25 per mem	123,657	129,915	
122		Legal & Accounting	40,000	40,000	
123		Committee Meetings	10,922	14,951	
124		Conferences	1,000	1,993	
125		Electoral Staff/ Activity	1,000	1,000	
126		Polls & Surveys	1,000	1,000	

	A	B	P	W	X
1	version 1.1		2014 - 12 months	2015 - 12 months	NOTES
2			Budget 2.2	Budget 1.1	
127		Special Printing	100	1,000	
129		Total Political/Social Involvement	177,879	189,859	
130					
131		SOCIAL & ECONOMIC JUSTICE			
132		Committee Meetings	5,000	5,000	
133		Conferences	350	350	
134		Contributions/Solidarity	4,530	4,530	
135		Caucus Activities	80,670	80,670	
136		Total Social & Economic Justice	90,550	90,550	remain the same as 2014
137					
138		MEMBER INVOLVEMENT			
139		Memorabilia/Give away Member Pride	30,000	30,000	same as 2014
140		Awards/Recognition	1,000	1,000	
141		Ex Board Reimbursement	2,000	2,000	
142		Rally Rental & Bus	20,000	40,000	IHSS, Kern & SCCO NEG Rally
143		Member Reimbursement/Lost time	2,500	5,000	
144		Transportation & Vehicle Expenses	12,000	22,081	membership drive
145		Total Member Involvement	67,500	100,081	
146					
147		NEGOTIATIONS			
148		Printing Contracts - outside vendor	50,000	50,000	SCCO printed contract
149		Meetings & Supplies	50,000	80,000	IHSS State wide, Kern & SCCO
150		Strike Preparations	40,000	60,000	IHSS State wide, Kern & SCCO
151		Automatic Strike Fund Transfer - reduction to \$	12	12	
152		Total Negotiations	140,012	190,012	
153		MEETINGS & EVENTS			
154		Executive Board Meetings	30,000	13,153	
155		Steward/Council meetings	3,002	3,077	
156		521 Party & other events	1,000	1,000	
157		2014-521 Convention/2015 INTL St. Louis	40,000	15,000	2015 INTL St Louis Convnt.-10p
158		Officer Election-2015	-	100,000	officers election
159		Industries & Members conference	25,000	10,000	
160		Miscellaneous	1,000		
161		Total Meetings & Events	100,002	142,231	
162					
163		REPRESENTATIVE DUES			
164	52,941	SEIU \$7.65 ea	5,200,378	4,859,984	no change
165	50,441	SEIU Unity Fund \$5.00ea	3,029,220	3,026,460	no change
166	820	SEIU Retirees & ChildCare \$1.00ea	8,952	9,844	no change
167	52,941	SEIU/ State Council-\$2.53ea	1,719,864	1,607,289	no change
168	600	Nurse Alliance \$1.45ea	12,180	10,440	no change
169	25,462	So Bay CLC Jun/11\$0.63,Jul/12\$0.65	174,166	198,604	no change
170	3,458	SMCO CLC \$0.60ea	24,559	24,898	no change
171	5,780	Fresno CLC \$0.45ea	32,076	31,212	no change
172	8,323	Bakersfield CLC \$0.50ea, est. increase	49,938	49,938	no change
173	6,258	Monterey & Santa Cruz LC \$0.55ea	41,032	41,303	no change
174	110	North Valley CLC	1,320	1,320	no change
175	52,941	CA Labor Fed 25% X .70ea, pd old rate \$0.47	16,452	14,929	no change
176		Building Trades-SMCO	3,600	3,600	no change
177		Total Representative Dues	10,313,738	9,879,820	
178					
179		TOTAL EXPENSES	33,005,168	33,199,825	
180					
181		TOTAL INCOME LESS TOTAL EXPENSE	(2,494,968)	(2,244,426)	
182					
183		VOLUNTARY TRANSFERS			
184		Building Funds	48,000	48,000	
185		Strike Fund	-		
186		Total Transfers	48,000	48,000	

SEIU Local 521 - 2015 General Fund Budget

APPROVED

	A	B	P	W	X
1	version 1.1		2014 - 12 months	2015 - 12 months	NOTES
2			Budget 2.2	Budget 1.1	
187		TOTAL INCOME LESS EXPENSES & TR	(2,542,968)	(2,292,426)	

SEIU Local 521 - External Org. Budget for year 2015

APPROVED

Version 1.1	Year 2015	NOTES
	12 months Budget	
Budget from SEIU Local 521	4,199,761	
Expenses		
Legal - Organizi	28,200	
Arbitration - Organizing	-	
Lost Time - Organizing / Wavers	29,072	
Salaries - Organizing (23+2)	1,819,356	all position filled
Workers Comp. Ins. - Org	63,677	all position filled
Payroll Tax Exp - Organ.	218,323	all position filled
401K Matchering	54,581	3% matching for 12 months
EMPLOYEE BENEFITS - Organizing	827,943	employer pay 100%
Pension Plan Exp - Organi.	363,871	20% for 12 months
Staff Recruiting Exp-Org.	10,000	
Vacation Liability Cash Out - Org	34,988	all position filled=1/2 pay period
Training Exp - Org.	1,379	
Mileage reimb exp - Organizing	12,473	
Vehicle Expenses	33,523	
RENT EXPENSES - Organizing	-	
Telephone Expenses - Organizing	10,001	
Utilities Expenses	-	
Office Supplies & Other Allocation	4,280	
Printing Expenses - Organizing	1,211	
Postage Expenses - Organizing	-	
PT Organizing	-	
Communication Cost Expenses	-	
Referral lead/DATA - Organizing	-	
Professional Fee Expenses	1,043	
Translation Expenses - Organ	-	
Equipment Leasing Exp - Organi	-	
Equip. Maint. & Repair -Organi	-	
Building Maint. & Repair -Organi	-	
Computer Database Services	-	
Subscriptions - Organizing	180	
Travel Expenses - ORGANIZING	231,291	
Conference - Organizing	-	
Rally / Bus Rental-Organizing	133	
Memorabilia / Give Away-Org	4,116	
Meeting - Organizing	10,909	
Donation - Organizing	1,600	
SEIU Int'l share cost	507,324	
Total Expenses	4,269,473	
Net Income	(69,711)	

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Bank Balance on Saving and Investment accounts
as of October 31st , 2015

DISCRETIONARY SAVINGS

ITEMS	GL#	ACCOUNT NAME	Bank	BALANCE as of 9/30/2015	+/- reason	BALANCE as of 10/31/2015
1	1005	CONTINGENCY FUND	Bank of The West #18986	50,088.75		50,088.75
2	1006	STRIKE FUND	Bank of The West #18978	62,508.98		62,508.98
3	1006	STRIKE FUND	Bank of The West - T- Bill Matures 1/11/2016	800,000.00		800,000.00
4	1006	STRIKE FUND	Bank of The West - T- Bill Matures 12/2/2015	700,000.00		700,000.00
5	1016	LEGAL DEFENSE FUND	Bank of The West # 28691	110,282.00	Accrued \$0.12 per month per member	116,635.11
6	1016	LEGAL DEFENSE FUND	Bank of The West - T- Bill Matures 12/2/2015	500,000.00		500,000.00
7	1017	GOOD & WELFARE FUND	Bank of The West #28758	3,382.15		3,382.15
8	1017	GOOD & WELFARE FUND	Bank of The West - T- Bill Matures 12/2/2015	65,000.00		65,000.00
9	1018	CAPITAL FUND	Bank of The West # 28667	44,361.63	Accrued \$1,000 per month	45,361.63
10	1019	BUILDING FUND	Bank of The West # 28733	87,480.33	Acc \$4k per mon,	91,480.33
11	1011	Accrued Vacation from EO to IO	Bank of The West #18820	150,330.32	Vacation bank transfer between EO and IO	150,330.32
Total reserve				\$ 2,573,434.16		\$ 2,584,787.27

POLITICAL - PAC money

12		PAC - Candidates	US Bank - Olson	145,580.00	Olson Statement Reconciled as of 9/30/2015	152,994.21
13		PAC - Issues	US Bank - Olson	70,953.41	Olson Statement Reconciled as of 9/30/2015	76,717.41
14		PAC - Independent Expenditure	US Bank - Olson	202,221.32	Olson Statement Reconciled as of 9/30/2015	202,221.32
				\$ 418,754.73		\$ 431,932.94

MANDATORY SAVINGS

15	1002	ORGANIZING FUND	Bank of The West #18895	460,853.96		451,453.92
16	1002	ORGANIZING FUND	Bank of The West - T- Bill Matures 1/11/16,12/2/15, 2/22/	1,900,000.00		1,900,000.00
17	1002	ORGANIZING FUND	Monterey County Employee Credit Union	203,664.71	CD with credit union, mature 2/28/2016	203,664.71
18	1002	ORGANIZING FUND Acc Vac	Bank of The West #33823	465,361.98	Accrued time off - adjust monthly to actual accrual	472,762.02
19	1003	AGENCY FEE	Bank of The West #18960	69,673.00	\$60,000 accrual monthly	129,673.10
20	1003	AGENCY FEE	Bank of The West - T- Bill Matures 3/30/2016	700,000.00		700,000.00
				\$ 3,799,553.65		\$ 3,857,553.75

Unfunded Reserve and Liabilities

21	2150-10	RETIREE BENEFIT TRUST	Unfunded Reserve	557.00	+ \$1 / month	558.00
22	2150-11	CLARENCE DODGE SCHOLARS	Unfunded Reserve	16,381.04	+ \$1250 / mon, scholarship sent for 2015	17,631.04
23	2400-00	Accrued Vacation for General Fund	Liabilities	2,237,524.29	adjust monthly to actual accrual	2,255,478.88
				\$ 2,254,462.33		\$ 2,273,667.92

Bank Balance on Saving and Investment accounts
as of November 30th , 2015

DISCRETIONARY SAVINGS

ITEMS	GL#	ACCOUNT NAME	Bank	BALANCE as of 10/31/2015	+/- reason	BALANCE as of 11/30/2015
1	1005	CONTINGENCY FUND	Bank of The West #18986	50,088.75		50,088.75
2	1006	STRIKE FUND	Bank of The West #18978	62,508.98		62,508.98
3	1006	STRIKE FUND	Bank of The West - T- Bill Matures 1/11/2016	800,000.00		800,000.00
4	1006	STRIKE FUND	Bank of The West - T- Bill Matures 12/2/2015	700,000.00		700,000.00
5	1016	LEGAL DEFENSE FUND	Bank of The West # 28691	116,635.11	Accrued \$0.12 per month per member	128,988.11
6	1016	LEGAL DEFENSE FUND	Bank of The West - T- Bill Matures 12/2/2015	500,000.00		500,000.00
7	1017	GOOD & WELFARE FUND	Bank of The West #28758	3,382.15		2,882.15
8	1017	GOOD & WELFARE FUND	Bank of The West - T- Bill Matures 12/2/2015	65,000.00		65,000.00
9	1018	CAPITAL FUND	Bank of The West # 28667	45,361.63	Accrued \$1,000 per month	46,361.63
10	1019	BUILDING FUND	Bank of The West # 28733	91,480.33	Acc \$4k per mon,	95,480.33
11	1011	Accrued Vacation from EO to IO	Bank of The West #18820	150,330.32	Vacation bank transfer between EO and IO	150,330.32
Total reserve				\$ 2,584,787.27		\$ 2,601,640.27

POLITICAL - PAC money

12		PAC - Candidates	US Bank - Olson	152,994.21	Olson Statement Reconciled as of 10/31/2015	160,754.46
13		PAC - Issues	US Bank - Olson	76,717.41	Olson Statement Reconciled as of 10/31/2015	39,477.66
14		PAC - Independent Expenditure	US Bank - Olson	202,221.32	Olson Statement Reconciled as of 10/31/2015	202,221.32
				\$ 431,932.94		\$ 402,453.44

MANDATORY SAVINGS

15	1002	ORGANIZING FUND	Bank of The West #18895	451,453.92		444,729.28
16	1002	ORGANIZING FUND	Bank of The West - T- Bill Matures 1/11/16,12/2/15, 2/22/	1,900,000.00		1,900,000.00
17	1002	ORGANIZING FUND	Monterey County Employee Credit Union	203,664.71	CD with credit union, mature 2/28/2016	203,767.39
18	1002	ORGANIZING FUND Acc Vac	Bank of The West #33823	472,762.02	Accrued time off - adjust monthly to actual accrual	479,486.66
19	1003	AGENCY FEE	Bank of The West #18960	129,673.10	\$60,000 accrual monthly	189,882.10
20	1003	AGENCY FEE	Bank of The West - T- Bill Matures 3/30/2016	700,000.00		700,000.00
				\$ 3,857,553.75		\$ 3,917,865.43

Unfunded Reserve and Liabilities

21	2150-10	RETIREE BENEFIT TRUST	Unfunded Reserve	558.00	+ \$1 / month	559.00
22	2150-11	CLARENCE DODGE SCHOLARS	Unfunded Reserve	17,631.04	+ \$1250 / mon, scholarship sent for 2015	18,881.04
23	2400-00	Accrued Vacation for General Fund	Liabilities	2,255,478.88	adjust monthly to actual accrual	2,246,852.15
				\$ 2,273,667.92		\$ 2,266,292.19

SEIU LOCAL 521																		
Income Statement - Current and YTD																		
For the Eleven Months Ending Monday, November 30, 2015																		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov			Budget	Y-T-D Actual	Better/(Worse)	Notes	
	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual		
8	TOTAL DUES RECEIPTS	2,793,332	2,412,592	2,661,814	2,519,862	2,697,112	2,623,927	2,855,227	2,476,923	2,395,680	2,551,187	2,573,219	2,366,139	(207,080)	28,305,407	28,353,795	48,387	
10	OTHER INCOME																	
11	Interest & Dividends	-	182	116	2,750	484	686	1,902	525	125	103	126	209	83	1,389	7,082	5,693	
12	Sublease Rent	5,806	5,479	5,479	5,479	5,479	5,479	5,179	5,179	5,299	5,299	6,272	5,299	(973)	68,987	59,456	(9,531)	
13	Misc. Income - SEIU Int'l Subsidy	19,600	-	111	7,202	15,147	40,176	1,483	(1,524)	58,203	850	-	(503)	(503)	-	140,745	140,745	
14	TOTAL OTHER INCOME	25,406	5,661	5,706	15,431	21,110	46,341	8,564	4,180	63,627	6,252	6,398	5,005	(1,393)	70,376	207,283	136,907	
16	TOTAL GENERAL FUND INCOME	2,818,738	2,418,253	2,667,520	2,535,293	2,718,222	2,670,268	2,863,791	2,481,103	2,459,307	2,557,439	2,579,617	2,371,144	(208,473)	28,375,783	28,561,078	185,294	
18	GENERAL FUND EXPENSES																	
19	ORGANIZING OFFSET	349,980	349,980	349,980	349,980	349,980	349,980	349,980	349,980	349,980	349,980	349,980	349,980	-	3,849,780	3,849,780		
21	SALARIES																	
22	Administrative	29,774	29,454	32,992	36,529	54,794	36,529	36,529	37,841	55,890	36,883	37,260	(377)	442,597	424,121	18,476	1 COS started 3/2015	
23	Admin Support	32,069	31,845	31,845	31,829	47,719	31,829	31,860	31,829	33,846	49,688	31,889	33,596	(1,707)	382,673	387,955	(5,282)	Beth position fund by ext org & Robert Li SCCO position VAC
24	Directors	83,187	82,627	79,139	75,778	120,102	82,308	82,308	82,308	86,371	126,963	96,588	84,964	11,624	1,159,053	986,055	172,998	1 vacant at temp position - partial yr
25	Internal Organizers/Research	320,083	326,751	324,382	322,130	476,142	323,511	331,768	320,077	327,585	465,627	342,490	314,041	28,449	4,109,880	3,852,097	257,783	GOW position funded by Ext Org
26	Clerical	75,834	76,217	77,200	77,557	118,795	80,586	74,821	72,989	73,747	115,263	81,001	79,406	1,595	972,008	922,415	49,593	
27	Facilities	7,441	7,314	7,281	7,281	10,854	7,516	7,432	7,213	7,213	10,891	7,213	7,504	(291)	86,562	87,940	(1,378)	
28	Data Base Services	22,667	22,401	22,419	22,393	33,496	22,383	23,980	22,866	22,777	34,185	25,238	23,160	2,078	302,853	272,727	30,126	
29	Temp. Internal Organizers/Research	4,156	15,803	2,245	3,183	911	334	690	150	654	777	6,250	140	6,110	68,750	29,043	39,707	
30	Temp. Clerical/Support	2,385	4,381	3,958	4,119	1,195	(398)	-	-	-	-	1,667	-	1,667	18,333	15,640	2,693	temp on 1 vacant position
31	Vacation & Comp Time	4,410	24,030	10,001	10,602	3,463	1,061	9,606	12,510	5,917	11,076	9,980	6,882	3,098	109,776	99,558	10,218	actual cash out
32	TOTAL SALARIES	582,006	620,823	591,462	591,401	867,471	585,659	598,994	586,471	595,951	870,360	639,199	586,953	52,246	7,652,485	7,077,551	574,934	
34	PAYROLL RELATED																	
35	Pension	110,964	112,584	113,117	111,937	171,768	114,969	114,762	113,533	114,719	169,181	124,260	113,434	10,826	1,491,126	1,360,968	130,158	unfilled positions
36	Payroll Taxes	88,673	60,056	57,832	45,895	67,922	45,819	48,618	45,794	46,611	67,162	74,556	49,456	25,100	894,676	623,838	270,838	
37	Travel Staff - Admin	1,813	1,087	7,494	5,087	1,651	3,720	8,330	4,517	4,233	8,060	4,022	5,565	(1,543)	44,239	51,557	(7,318)	
38	Travel Staff - Internal Organizers	6,524	12,376	16,333	17,737	13,380	12,859	14,863	14,953	7,692	15,349	15,787	24,037	(8,250)	173,653	156,103	17,550	
39	Mileage/Ins. Reimb.-Admin & Director	352	352	493	506	661	949	395	729	343	285	462	556	(94)	5,087	5,621	(534)	
40	Mileage/Ins. Reimb.-Internal Organizers	10,720	14,318	13,996	18,546	17,086	11,796	15,492	11,234	11,511	17,067	13,605	17,713	(4,108)	149,652	159,479	(9,827)	
41	Telephone Reimbursement	8,044	7,041	6,426	8,635	5,475	5,749	7,637	5,563	8,706	12,415	6,421	7,432	(1,011)	70,636	83,123	(12,487)	
42	Retiree Health	9,177	9,081	8,863	9,023	8,232	9,171	11,823	11,731	11,960	9,966	8,666	327	8,339	103,992	99,354	4,638	
43	Retire Benefit Trust Fund	1	1	1	1	1	1	1	1	1	1	-	1	(1)	-	11	(11)	unfilled positions, BC sent inv 12/15
44	Benefits (Health,Dental,Vision,Life,401K,Flex Plan)	234,431	234,052	244,240	237,911	242,826	247,715	256,323	243,827	238,564	247,843	240,443	87,149	153,294	2,885,316	2,514,881	370,435	
45	Workers Comp Insurance	20,028	20,028	19,629	13,544	13,544	13,544	13,544	13,544	17,723	13,544	18,639	13,544	5,095	223,669	172,216	51,453	
46	Recruiting	768	668	226	108	154	36	36	115	-	-	667	244	423	7,333	2,355	4,978	
47	TOTAL PAYROLL RELATED	491,495	471,644	488,650	468,930	542,700	466,328	491,824	465,541	462,063	560,873	507,528	319,458	188,070	6,049,379	5,229,506	819,873	
49	TOTAL SALARIES & PAYROLL RELATED	1,073,501	1,092,467	1,080,112	1,060,331	1,410,171	1,051,987	1,090,818	1,052,012	1,058,014	1,431,233	1,146,727	906,411	240,316	13,701,864	12,307,057	1,394,807	
51	MISCELLANEOUS																	
52	Agency Fee	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	-	660,000	660,000	-	
53	Capital Fund	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	-	11,000	11,000	-	
54	Admin Exp Share w/Chapters	365	728	514	417	573	522	506	455	484	574	1,000	576	424	11,000	5,714	5,286	
55	Free Life Insurance to Members (SCR, MRY & BFL)	300	303	295	291	291	301	300	299	307	312	389	317	72	4,276	3,316	960	
56	Chapter Fund Reimbursement	1,288	968	847	844	866	882	940	904	863	874	1,205	1,194	11	13,260	10,470	2,790	
57	Dodge Scholarship	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	-	13,750	13,750	-	
58	Computer Database Unionware	5,583	6,060	5,583	5,583	4,877	5,233	5,482	4,983	12,425	8,674	6,153	4,983	1,170	67,688	69,466	(1,778)	
59	TOTAL MISCELLANEOUS	69,786	70,309	69,489	69,385	68,857	69,188	69,478	68,891	76,329	72,684	70,997	69,320	1,677	780,974	773,716	7,258	
61	ARBITRATIONS & LEGAL																	
62	Arbitrations Fees & Legal Admin	6,174	26,915	4,818	11,261	25,651	6,656	12,627	35,795	3,818	37,624	15,985	12,493	3,492	175,830	183,832	(8,002)	

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	SEIU LOCAL 521																
2	Organizing																
3	Income Statement																
4	For the Eleven Months Ending Monday, November 30, 2015																
5																	
6		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov			Budget	Y-T-D Actual	Better/(Worse)
7		Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Budget	Actual	Better/(Worse)			
8																	
9	BUDGET FROM GENERAL FUND	349,980	349,980	349,980	349,980	349,980	349,980	349,980	349,980	349,980	349,980	349,980	349,980	-	3,849,780	3,849,780	-
10																	
11	EXPENSES																
12	Legal - Org	2,350	2,350	2,350	2,350	2,350	2,350	2,350	2,350	2,350	2,350	2,350	2,350	-	25,850	25,850	-
13	Salaries - Organizing	80,924	84,723	91,187	92,277	138,656	92,019	90,422	91,908	94,846	140,373	139,950	94,020	45,930	1,679,406	1,091,355	588,051
14	Salaries - Org / Intern / Lost Timer	-	-	-	-	-	-	-	-	-	-	2,423	-	2,423	26,649	-	26,649
15	Part Time Exp - Org	-	2,546	1,074	-	1,537	6,325	50,128	7,132	6,874	8,148	-	7,156	(7,156)	-	90,920	(90,920)
16	Workers Comp. Insurance Exp - Org	2,817	2,817	1,905	1,905	1,905	1,905	1,905	1,905	1,905	1,905	4,898	1,905	2,993	58,779	22,779	36,000
17	Payroll Tax Exp - Org	5,805	6,454	7,190	7,046	10,580	7,832	6,906	7,019	7,244	10,711	16,794	7,181	9,613	201,529	83,968	117,561
18	Employee Benefits Exp - Org	31,462	37,832	33,157	35,858	34,580	34,501	30,908	33,392	32,150	32,154	63,688	13,552	50,136	764,255	349,546	414,709
19	Pension Plan Exp - Org	15,753	16,704	17,950	18,193	27,372	17,580	17,633	18,055	18,606	27,587	27,990	18,454	9,536	335,881	213,887	121,994
20	401k Matching Exp - Org	1,760	1,953	2,044	1,968	2,963	2,188	1,905	1,946	2,013	2,981	4,199	2,293	1,906	50,382	24,014	26,368
21	Staff Recruiting Exp - Org	-	-	-	201	-	-	36	-	-	-	833	-	833	9,167	237	8,930
22	Vacation / Comp Time Exp - Org	-	-	2,971	-	-	-	-	-	-	-	2,691	-	2,691	32,297	2,971	29,326
23	Training Exp - Org	-	-	317	-	-	-	-	57	-	-	115	110	5	1,264	1,866	(602)
24	Mileage Reimbursement Exp - Org	50	1,781	1,421	1,795	3,258	50	1,395	1,822	2,519	2,228	1,039	1,176	(137)	11,434	17,495	(6,061)
25	Vehicle Exp - Org	800	2,549	2,767	4,207	4,129	9,617	7,080	3,127	2,352	3,271	2,794	2,377	417	30,729	42,276	(11,547)
26	Telephone Exp - Org	1,275	3,816	2,982	2,797	6,268	839	2,885	3,122	2,533	3,056	833	3,028	(2,195)	9,168	32,601	(23,433)
27	Utilities Exp - Org	452	310	314	322	352	544	677	18	1,094	511	-	255	(255)	-	4,849	(4,849)
28	Equipment Leasing Exp - Org	434	486	486	486	152	486	919	589	534	434	-	486	(486)	-	5,492	(5,492)
29	Equipment Maintenance & Repair Exp - Org	646	-	113	-	-	-	-	-	-	101	-	3	(3)	-	863	(863)
30	Building Maintenance & Repair Exp - Org	1,381	1,455	1,657	1,445	1,293	1,352	2,330	1,300	5,356	1,500	-	1,371	(1,371)	-	20,440	(20,440)
31	Office Supplies Exp - Org	354	496	1,033	288	786	643	977	125	692	1,142	357	1,467	(1,110)	3,923	8,003	(4,080)
32	Lunchroom Supplies Exp - Org	171	87	54	791	833	665	656	67	35	727	-	694	(694)	-	4,780	(4,780)
33	Paper Exp - Org	-	-	702	-	-	-	324	-	604	-	-	235	(235)	-	1,865	(1,865)
34	Printing Exp - Org	-	-	360	-	448	75	41	-	-	717	101	-	101	1,110	1,641	(531)
35	Postage Exp - Org	16,513	-	12	-	-	-	-	-	-	-	-	-	-	-	16,525	(16,525)
36	Communication Cost Exp - Org	5,000	-	-	3,000	-	-	-	-	-	-	-	-	-	-	8,000	(8,000)
37	Professional Fee Exp - Org	-	-	-	-	-	1,649	-	-	-	-	87	-	87	956	1,649	(693)
38	Subscriptions Exp - Org	21	21	21	156	21	23	19	23	23	23	15	23	(8)	165	374	(209)
39	Travel Exp - Org	28,504	19,540	24,237	33,145	29,399	25,213	30,842	46,767	34,712	33,945	19,274	30,912	(11,638)	212,017	337,216	(125,199)
40	Conference Exp - Org	-	-	-	-	-	-	-	1,274	150	-	-	-	-	-	1,424	(1,424)
41	Rally / Bus Rental Exp - Org	-	-	-	1,389	675	-	1,522	-	-	-	11	3,878	(3,867)	122	7,464	(7,342)
42	Memorabilia / Give Away Exp - Org	907	3,622	-	-	-	-	-	15,895	-	6,640	343	-	343	3,773	27,064	(23,291)
43	Meeting Exp - Org	68	242	711	1,680	556	1,449	418	1,483	524	569	909	2,226	(1,317)	10,000	9,926	74
44	Donation Exp - Org	-	-	5,000	-	-	-	-	-	-	-	133	5,000	(4,867)	1,467	10,000	(8,533)
45	SEIU Int'l Share Cost	-	-	1,507,324	-	-	-	-	-	-	-	42,277	-	42,277	465,047	1,507,324	(1,042,277)
46	TOTAL ORGANIZING EXPENSES	197,447	189,784	1,709,339	211,299	269,495	207,305	252,278	239,376	217,116	281,073	334,104	200,152	133,952	3,935,370	3,974,664	(39,294)
48	NET INCOME	152,533	160,196	(1,359,359)	138,681	80,485	142,675	97,702	110,604	132,864	68,907	15,876	149,828	133,952	(85,590)	(124,884)	(39,294)

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	R
2	County	Office	B	C		Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	AVERAGE
184	KER	BFL	26	A	Public Cemetery District #1 - Agency	-	-	-	-	-	-	-	-	1	-	1	0
185	KER	BFL	12	M	Standard School District	43	43	41	41	41	41	-	-	43	42	49	35
186	SBA	VIS	12	M	Student Transportation of America	31	31	-	31	-	29	13	24	-	25	25	19
187	KER	BFL	12	M	Taft Union High School District	25	24	24	24	24	23	23	12	23	23	23	23
188	REGION 6																
189	SMC	RWC	12	M	Homebridge	23	22	35	38	42	49	47	46	-	-	-	38
190	SMC	RWC	12	A	Homebridge - Agency	13	17	10	7	9	7	7	8	-	-	-	10
191	SMC	RWC	12	M	IHSS San Mateo	2,390	2,342	2,310	2,312	2,262	2,260	2,247	2,243	-	-	-	2,296
192	SCC	SJC	12	M	IHSS Santa Clara	10,832	10,688	10,406	10,725	10,600	10,643	10,668	10,614	-	-	-	10,647
193	SCC	SJC	26	M	Institute on Aging/Older Adults Care Management	151	161	151	165	171	169	177	-	-	-	-	143
194	SCC	RWC	12	M	Pathways Continuous Care	62	56	58	55	-	68	-	61	-	-	-	45
195	SCC	RWC	12	A	Pathways Continuous Care - Agency	71	60	58	51	-	57	-	54	-	-	-	44
196	REGION OTHER																
197	SCC	SJC	12	M	Child Care Providers United California	485	438	484	464	437	523	450	526	472	502	481	478
198	SCC	SJC	26	M	Local 521 Staff & Officers	33	32	31	30	30	29	28	27	26	32	32	30
199	SCC	SJC	12	M	Retired Members Chapter (521)	660	354	310	309	316	323	341	330	316	320	436	365
200																	
201					Total Members	44,023	42,551	43,444	43,938	43,892	44,104	44,162	43,004	30,535	31,402	32,015	40,279
202					Total Agency Fee Payers	9,687	9,175	9,728	9,580	9,469	9,550	9,502	9,051	9,055	9,454	9,076	9,393
204					Total Count	53,710	51,726	53,172	53,518	53,361	53,654	53,664	52,055	39,590	40,856	41,091	49,672

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SEIU Local 521 Budget and Finance Committee Motion

Item Number: 01

Date: January 20, 2016

Motion Title: Consent Agenda for Financial Statements

Recommended By: RoseAnn Dominguez, SEIU Local 521 Treasurer

The Following Reports have been placed on the CONSENT AGENDA for approval/confirmation without discussion. If you wish discussion, pull the report from the CONSENT AGENDA:

NO Motion is required to remove a report from the Report Consent Agenda.

October and November 2015 Financials

- 2015 Approved General Fund and Organizing Budgets - (page - 7-12)
- Bank Balances - (DOCUMENTS 1) - (page - 13-14)
- Income Statement - (DOCUMENT 2) - (pages - 15-18)
- Organizing Income Statement - (DOCUMENT 3) - (pages - 19-20)
- Dues Receipts - (DOCUMENT 4) - (pages - 21-22)
- Per Capita Report - (DOCUMENT 5) - (pages - 23-28)

***Motion:** To approve/confirm as presented **ALL Reports** on the Consent Agenda **EXCEPT** those pulled and listed below which will be held **for discussion**:

Follow Up:

Moved by: Moved Second: Second

Amendment: _____

Amended By: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

Connie Chen

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SEIU Local 521 Budget and Finance Committee Motion

Item Number: 02

Date: January 20, 2016

Motion Title: Approval of the Vendor for the Local's TeleTown Hall Meetings for 2016

Recommended By: Khanh Weinberg, Communications Director

Background:

We have found that TeleTown Hall Meetings are a very positive means for distributing and receiving information to and from our members as well as other labor and progressive supporters regarding not only political issues but other crucial and time sensitive forums. As this will be a Presidential Election year there may be the need for more TeleTown Hall Meetings than has been typical.

We have received three bids for the TeleTown Hall Meetings we anticipate:

- 1) CHISM STRATEGIES – the bid is \$4,750 per event – if purchased individually and \$4,275 per event – if purchased as a bundle of 5 events.
- 2) BRUSHFIRE STRATEGIES – the bid is \$4,500 per event – if purchased individually and \$4,050 per event – if purchased as a bundle.
- 3) STONES PHONES – the bid is \$5,750 per event – if purchased individually and \$4,650 per event – if purchased as a bundle of 5 events.

Last year we chose STONES PHONES. This year we would recommend CHISM STRATEGIES mainly because of the difference in cost.

Motion: To approve contracting with CHISM STRATEGIES for the Local's TeleTown Hall Meetings in 2016.

Follow Up:

Moved by: Moved Second: Seconded

Amendment: withdrawn forward to officers

Amended By: for further discussion

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

Connie Chen

SEIU Local 521 Budget and Finance Committee Motion

Item Number: 03

Date: January 20, 2016

Motion Title: Policy Regarding Submission of Motions, Information, and Reports for Budget & Finance, Officers', and Executive Board Meeting Agendas

Recommended By: Luisa Blue, Chief Elected Officer

Background:

There has been no written Policy for submitting Motions, Information, and Reports for Budget & Finance, Officers', and Executive Board Meeting Agendas. Although the Admin to the Executive Board has stated on reminders to all persons and groups typically submitting motions, information, and reports for the various agendas that these items should be received at least 10 days prior to the various meetings, these reminders have been for the most part ignored.

Therefore, it is requested that a Policy be put into place that except for late month COPE Meeting motions (which may be received 5 days before the meeting where they will be heard) and emergency situations, all motions, information, and reports for Budget & Finance, Officers', and Executive Board Meeting Agendas are to be received by the Admin to the Executive Board at least 12 days prior to the meeting where they will be heard. Bringing up a Motion from the floor or distributing information or reports at the meeting to bypass the deadline will not be allowed. 12 rather than 10 days takes away any weekend issue.

Motion: To approve and forward to the Officers for approval a Policy that: except for late month COPE Meeting motions (which may be received 5 days before the meeting where they will be heard) and emergency situations, all motions, information, and reports for Budget & Finance, Officers', and Executive Board Meeting Agendas are to be received by the Admin to the Executive Board at least 12 days prior to the meeting where they will be heard. Bringing up a Motion from the floor or distributing information or reports at the meeting to bypass the deadline will not be allowed.

Follow Up:

Moved by: Moved Second: Seconded

Amendment: motion withdrawn

Amended By: rework as guidelines

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

Connie Chen

SEIU LOCAL 521
ALL REGION TOTALS

CHIEF ELECTED OFFICER (CEO)		
Luisa Blue		820
PRESIDENT		
wRen Bradley		372
Gwyndolyn Harshaw		622
David Parker		86
FIRST VICE PRESIDENT		
Alysia Bonner		828
SECRETARY		
Catherine McCoy		832
TREASURER		
RoseAnn Dominguez		827
TRUSTEES AT-LARGE		
Paul Klunder		772
AFRICAN-AMERICAN CAUCUS EXECUTIVE BOARD DELEGATE		
Arvelia Via Cooper-Whigham		788
ASIAN PACIFIC AMERICAN LABOR ALLIANCE CAUCUS EXECUTIVE BOARD DELEGATE		
Karen Nakatani		797
LATINO CAUCUS EXECUTIVE BOARD DELEGATE		
Rachel Subega		787
REGION 1 VICE PRESIDENT		
Hector San Roman		355
REGION 1 TRUSTEE		
Lesbia Reclosado		321
REGION 2 VICE PRESIDENT		
Matt Nathanson		187
REGION 2 TRUSTEE		
<i>No nominees for this position.</i>		
REGION 3 VICE PRESIDENT		
<i>No nominees for this position</i>		
REGION 3 TRUSTEE		
<i>No nominees for this position</i>		
REGION 4 VICE PRESIDENT		
Jennifer Jensen		94
REGION 4 TRUSTEE		
Darlynn Qualls		93
REGION 5 VICE PRESIDENT		
Sonja Bennett		202
REGION 5 TRUSTEE		
<i>No Nominee For This Position</i>		

SEIU LOCAL 521
ALL REGION TOTALS

EXECUTIVE BOARD DELEGATE -Santa Clara County Chapter		
Connie Chew		221
Carmella DiSopa		195
Trina Moehring		183
EXECUTIVE BOARD DELEGATE -Valley Transportation Authority Chapter		
Tammy Dhanota		1
Ethan Winston		0
EXECUTIVE BOARD DELEGATE - Monterey County Chapter		
Yvette Carreaon		96
Ana Mendoza		74
Javier Sanchez		88
EXECUTIVE BOARD DELEGATE - Santa Cruz County Chapter		
Jane Christmann		40
Jim Heaney		44
EXECUTIVE BOARD DELEGATE - Salinas Office Composite Chapter		
Luis A. Aguilar		2
EXECUTIVE BOARD DELEGATE - Santa Cruz Office Composite Chapter		
<i>No nominees for this position.</i>		
EXECUTIVE BOARD DELEGATE - Fresno Unified School District / FASTA Chapter		
Sergio Garcia		5
EXECUTIVE BOARD DELEGATE - Fresno County Chapter		
Laura Basua		49
EXECUTIVE BOARD DELEGATE - City of Bakersfield Chapter		
Rodolfo Sanchez Plaza		0
EXECUTIVE BOARD DELEGATE - Kern County Chapter		
Rosie Kidwell		86
Alicia Rizo		118
EXECUTIVE BOARD DELEGATE - Tulare County Chapter		
Ryan Wilson		11
EXECUTIVE BOARD DELEGATES - Region 7		
Myrna Bravo		16
Carol Garvey		22
Gary Linsner		20

SEIU LOCAL 521
ALL REGION TOTALS

2016 VOTE ON BYLAWS AMENDMENTS

1. Group of amendments that provide clarification of current practices.	
YES	728
NO	103
2. Rules Regarding Elections and Replacement of Executive Board Officers and Delegates	
YES	739
NO	98
3. Deletes the Associate Member Category Of "Laid-Off" Members	
YES	593
NO	218
4. Allows Minor Clerical Changes To Be Made To The Bylaws Without A Vote Of The Membership	
YES	580
NO	262
Total Number of Ballots	

**SEIU LOCAL 521
REGION 1 TOTAL: SANTA CLARA, SAN MATEO**

CHIEF ELECTED OFFICER (CEO)	
Luisa Blue	323
PRESIDENT	
wRen Bradley	242
Gwyndolyn Harshaw	212
David Parker	31
FIRST VICE PRESIDENT	
Alysia Bonner	324
SECRETARY	
Catherine McCoy	332
TREASURER	
RoseAnn Dominguez	330
TRUSTEES AT-LARGE	
Paul Klunder	321
AFRICAN-AMERICAN CAUCUS EXECUTIVE BOARD DELEGATE	
Arvelia Via Cooper-Whigham	310
ASIAN PACIFIC AMERICAN LABOR ALLIANCE CAUCUS EXECUTIVE BOARD DELEGATE	
Karen Nakatani	315
LATINO CAUCUS EXECUTIVE BOARD DELEGATE	
Rachel Subega	323
REGION 1 VICE PRESIDENT	
Hector San Roman	334
REGION 1 TRUSTEE	
Lesbia Reclosado	299
EXECUTIVE BOARD DELEGATE -Santa Clara County Chapter	
Connie Chew	221
Carmella DiSopa	195
Trina Moehring	183
EXECUTIVE BOARD DELEGATE -Valley Transportation Authority Chapter	
Tammy Dhanota	1
Ethan Winston	0

SEIU LOCAL 521
REGION 1 TOTAL: SANTA CLARA, SAN MATEO

2013 VOTE ON BYLAWS AMENDMENTS

1. Group of amendments that provide clarification of current practices.		
YES		294
NO		52
2. Rules Regarding Elections and Replacement of Executive Board Officers and Delegates		
YES		289
NO		55
3. Deletes the Associate Member Category Of "Laid-Off" Members		
YES		235
NO		96
4. Allows Minor Clerical Changes To Be Made To The Bylaws Without A Vote Of The Membership		
YES		223
NO		125

Total Number of Ballots

**SEIU LOCAL 521
REGION 2 TOTAL: SANTA CRUZ, MONTEREY, SAN BENITO**

CHIEF ELECTED OFFICER (CEO)	
Luisa Blue	170
PRESIDENT	
wRen Bradley	96
Gwyndolyn Harshaw	115
David Parker	14
FIRST VICE PRESIDENT	
Alysia Bonner	164
SECRETARY	
Catherine McCoy	166
TREASURER	
RoseAnn Dominguez	165
TRUSTEES AT-LARGE	
Paul Klunder	159
AFRICAN-AMERICAN CAUCUS EXECUTIVE BOARD DELEGATE	
Arvelia Via Cooper-Whigham	158
ASIAN PACIFIC AMERICAN LABOR ALLIANCE CAUCUS EXECUTIVE BOARD DELEGATE	
Karen Nakatani	155
LATINO CAUCUS EXECUTIVE BOARD DELEGATE	
Rachel Subega	161
REGION 2 VICE PRESIDENT	
Matt Nathanson	179
REGION 2 TRUSTEE	
<i>No nominees for this position.</i>	
EXECUTIVE BOARD DELEGATE - Monterey County Chapter	
Yvette Carreaon	96
Ana Mendoza	74
Javier Sanchez	88
EXECUTIVE BOARD DELEGATE - Santa Cruz County Chapter	
Jane Christmann	40
Jim Heaney	44
EXECUTIVE BOARD DELEGATE - Salinas Office Composite Chapter	
Luis A. Aguilar	2
EXECUTIVE BOARD DELEGATE - Santa Cruz Office Composite Chapter	
<i>No nominees for this position.</i>	

SEIU LOCAL 521
REGION 2 TOTAL: SANTA CRUZ, MONTEREY, SAN BENITO

2016 VOTE ON BYLAWS AMENDMENTS

1. Group of amendments that provide clarification of current practices.	
YES	169
NO	22
2. Rules Regarding Elections and Replacement of Executive Board Officers and Delegates	
YES	179
NO	18
3. Deletes the Associate Member Category Of "Laid-Off" Members	
YES	132
NO	59
4. Allows Minor Clerical Changes To Be Made To The Bylaws Without A Vote Of The Membership	
YES	135
NO	62

Total Number of Ballots

SEIU LOCAL 521
REGION 3 TOTAL: SANTA CRUZ, MONTEREY, SAN BENITO

CHIEF ELECTED OFFICER (CEO)	
Luisa Blue	4
PRESIDENT	
wRen Bradley	2
Gwyndolyn Harshaw	0
David Parker	4
FIRST VICE PRESIDENT	
Alysia Bonner	6
SECRETARY	
Catherine McCoy	6
TREASURER	
RoseAnn Dominguez	6
TRUSTEES AT-LARGE	
Paul Klunder	6
AFRICAN-AMERICAN CAUCUS EXECUTIVE BOARD DELEGATE	
Arvelia Via Cooper-Whigham	5
ASIAN PACIFIC AMERICAN LABOR ALLIANCE CAUCUS EXECUTIVE BOARD DELEGATE	
Karen Nakatani	6
LATINO CAUCUS EXECUTIVE BOARD DELEGATE	
Rachel Subega	5
REGION 3 VICE PRESIDENT	
<i>No nominees for this position</i>	
REGION 3 TRUSTEE	
<i>No nominees for this position</i>	

SEIU LOCAL 521
REGION 3 TOTAL: SANTA CRUZ, MONTEREY, SAN BENITO

2016 VOTE ON BYLAWS AMENDMENTS

1. Group of amendments that provide clarification of current practices.

YES	4
NO	1

2. Rules Regarding Elections and Replacement of Executive Board Officers and Delegates

YES	5
NO	0

3. Deletes the Associate Member Category Of "Laid-Off" Members

YES	3
NO	1

4. Allows Minor Clerical Changes To Be Made To The Bylaws Without A Vote Of The Membership

YES	5
NO	0

Total Number of Ballots

**SEIU LOCAL 521
REGION 4 TOTAL: MADERA, FRESNO**

CHIEF ELECTED OFFICER (CEO)	
Luisa Blue	82
PRESIDENT	
wRen Bradley	10
Gwyndolyn Harshaw	80
David Parker	8
FIRST VICE PRESIDENT	
Alysia Bonner	86
SECRETARY	
Catherine McCoy	81
TREASURER	
RoseAnn Dominguez	83
TRUSTEES AT-LARGE	
Paul Klunder	72
AFRICAN-AMERICAN CAUCUS EXECUTIVE BOARD DELEGATE	
Arvelia Via Cooper-Whigham	85
ASIAN PACIFIC AMERICAN LABOR ALLIANCE CAUCUS EXECUTIVE BOARD DELEGATE	
Karen Nakatani	83
LATINO CAUCUS EXECUTIVE BOARD DELEGATE	
Rachel Subega	74
REGION 4 VICE PRESIDENT	
Alysia L. Bonner	86
REGION 4 TRUSTEE	
Darlynn Qualls	84
EXECUTIVE BOARD DELEGATE - Fresno Unified School District / FASTA Chapter	
Sergio Garcia	5
EXECUTIVE BOARD DELEGATE - Fresno County Chapter	
Laura Basua	49

SEIU LOCAL 521
REGION 4 TOTAL: MADERA, FRESNO

2016 VOTE ON BYLAWS AMENDMENTS

1. Group of amendments that provide clarification of current practices.	
YES	71
NO	8
2. Rules Regarding Elections and Replacement of Executive Board Officers and Delegates	
YES	76
NO	4
3. Deletes the Associate Member Category Of "Laid-Off" Members	
YES	63
NO	17
4. Allows Minor Clerical Changes To Be Made To The Bylaws Without A Vote Of The Membership	
YES	63
NO	19

Total Number of Ballots

SEIU LOCAL 521
REGION 5 TOTAL: TULARE, KINGS, KERN, INYO

CHIEF ELECTED OFFICER (CEO)	
Luisa Blue	177
PRESIDENT	
wRen Bradley	8
Gwyndolyn Harshaw	168
David Parker	20
FIRST VICE PRESIDENT	
Alysia Bonner	186
SECRETARY	
Catherine McCoy	186
TREASURER	
RoseAnn Dominguez	182
TRUSTEES AT-LARGE	
Paul Klunder	155
AFRICAN-AMERICAN CAUCUS EXECUTIVE BOARD DELEGATE	
Arvelia Via Cooper-Whigham	172
ASIAN PACIFIC AMERICAN LABOR ALLIANCE CAUCUS EXECUTIVE BOARD DELEGATE	
Karen Nakatani	178
LATINO CAUCUS EXECUTIVE BOARD DELEGATE	
Rachel Subega	163
REGION 5 VICE PRESIDENT	
Sonja Bennett	189
REGION 5 TRUSTEE	
<i>No Nominee For This Position</i>	
EXECUTIVE BOARD DELEGATE - City of Bakersfield Chapter	
Rodolfo Sanchez Plaza	0
EXECUTIVE BOARD DELEGATE - Kern County Chapter	
Rosie Kidwell	86
Alicia Rizo	118
EXECUTIVE BOARD DELEGATE - Tulare County Chapter	
Ryan Wilson	11

SEIU LOCAL 521
REGION 5 TOTAL: TULARE, KINGS, KERN, INYO

2016 VOTE ON BYLAWS AMENDMENTS

1. Group of amendments that provide clarification of current practices.	
YES	138
NO	17
2. Rules Regarding Elections and Replacement of Executive Board Officers and Delegates	
YES	139
NO	16
3. Deletes the Associate Member Category Of "Laid-Off" Members	
YES	115
NO	35
4. Allows Minor Clerical Changes To Be Made To The Bylaws Without A Vote Of The Membership	
YES	108
NO	47

Total Number of Ballots

SEIU LOCAL 521
REGION 7 TOTAL

CHIEF ELECTED OFFICER (CEO)	
Luisa Blue	34
PRESIDENT	
wRen Bradley	11
Gwyndolyn Harshaw	20
David Parker	4
FIRST VICE PRESIDENT	
Alysia Bonner	33
SECRETARY	
Catherine McCoy	33
TREASURER	
RoseAnn Dominguez	33
TRUSTEES AT-LARGE	
Paul Klunder	33
AFRICAN-AMERICAN CAUCUS EXECUTIVE BOARD DELEGATE	
Arvelia Via Cooper-Whigham	31
ASIAN PACIFIC AMERICAN LABOR ALLIANCE CAUCUS EXECUTIVE BOARD DELEGATE	
Karen Nakatani	32
LATINO CAUCUS EXECUTIVE BOARD DELEGATE	
Rachel Subega	33

SEIU LOCAL 521
REGION 7 TOTAL

REGION 1 VICE PRESIDENT	
Hector San Roman	12
REGION 1 TRUSTEE	
Lesbia Reclosado	13
REGION 2 VICE PRESIDENT	
Matt Nathanson	3
REGION 2 TRUSTEE	
<i>No nominees for this position.</i>	
REGION 3 VICE PRESIDENT	
<i>No nominees for this position</i>	
REGION 3 TRUSTEE	
<i>No nominees for this position</i>	
REGION 4 VICE PRESIDENT	
Jennifer Jensen	5
REGION 4 TRUSTEE	
Darlynn Qualls	5
REGION 5 VICE PRESIDENT	
Sonja Bennett	3
REGION 5 TRUSTEE	
<i>No Nominee For This Position</i>	
EXECUTIVE BOARD DELEGATES - Region 7	
Myrna Bravo	16
Carol Garvey	22
Gary Linsner	20

SEIU LOCAL 521
REGION 7 TOTAL

2016 VOTE ON BYLAWS AMENDMENTS

1. Group of amendments that provide clarification of current practices.	
YES	26
NO	3
2. Rules Regarding Elections and Replacement of Executive Board Officers and Delegates	
YES	25
NO	4
3. Deletes the Associate Member Category Of "Laid-Off" Members	
YES	21
NO	8
4. Allows Minor Clerical Changes To Be Made To The Bylaws Without A Vote Of The Membership	
YES	23
NO	6

Total Number of Ballots

SEIU LOCAL 521
REGION 8 TOTAL

CHIEF ELECTED OFFICER (CEO)	
Luisa Blue	30
PRESIDENT	
wRen Bradley	3
Gwyndolyn Harshaw	27
David Parker	5
FIRST VICE PRESIDENT	
Alysia Bonner	29
SECRETARY	
Catherine McCoy	28
TREASURER	
RoseAnn Dominguez	28
TRUSTEES AT-LARGE	
Paul Klunder	26
AFRICAN-AMERICAN CAUCUS EXECUTIVE BOARD DELEGATE	
Arvelia Via Cooper-Whigham	27
ASIAN PACIFIC AMERICAN LABOR ALLIANCE CAUCUS EXECUTIVE BOARD DELEGATE	
Karen Nakatani	28
LATINO CAUCUS EXECUTIVE BOARD DELEGATE	
Rachel Subega	28
REGION 1 VICE PRESIDENT	
Hector San Roman	9
REGION 1 TRUSTEE	
Lesbia Reclosado	9
REGION 2 VICE PRESIDENT	
Matt Nathanson	5
REGION 2 TRUSTEE	
<i>No nominees for this position.</i>	
REGION 3 VICE PRESIDENT	
<i>No nominees for this position</i>	
REGION 3 TRUSTEE	
<i>No nominees for this position</i>	
REGION 4 VICE PRESIDENT	
Jennifer Jensen	3
REGION 4 TRUSTEE	
Darlynn Qualls	4
REGION 5 VICE PRESIDENT	
Sonja Bennett	10

REGION 5 TRUSTEE

No Nominee For This Position

2016 VOTE ON BYLAWS AMENDMENTS

1. Group of amendments that provide clarification of current practices.	
YES	26
NO	0
2. Rules Regarding Elections and Replacement of Executive Board Officers and Delegates	
YES	26
NO	1
3. Deletes the Associate Member Category Of "Laid-Off" Members	
YES	24
NO	2
4. Allows Minor Clerical Changes To Be Made To The Bylaws Without A Vote Of The Membership	
YES	23
NO	3
Total Number of Ballots	

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**SEIU Local 521
PACE and PAC
as of December 31, 2015**

Independent Expenditures		
Bank Balance as of 11/30/15		\$ 217,203.36
<i>Outstanding Deposits: None</i>		-
<i>Outstanding Motions:</i>		
Ed Mitchell for Supervisor	3.22.14-B6	603.90
Polling for Monterey County BOS District 2	3.22.14-B8	10,000.00
Committee fo Elect Ed Mitchell for Supervisor 2014	8.26.14-B8	4,203.14
<i>Available Funds - PACE</i>		175.00
<i>Available Funds - PAC</i>		202,221.32
		0.00

Candidates		
Bank Balance as of 11/30/15		\$ 173,566.07
<i>Outstanding Deposits: Nov, Dec</i>		16,158.75
<i>Outstanding Motions:</i>		
Toni Atkins for State Assembly 2014	7.22.14-B2	
DAWN Event	8.25.15-B1	300.00
Evan Low for Assembly 2016	9.26.15-B2	
Jerry Hill for Senate 2016	12.7.13-B2	1,000.00
Kansen Chu for State Assembly 2016	10.28.14-B5	1,000.00
Re-Elect Senator Wieckowski for Senate 2018	12.7.13-B2	1,500.00
Stone for Assembly 2016, Friends of Mark	12.7.13-B2	2,500.00
Rick Bonilla for City Council 2015	9.26.15-B4	250.00
Freschet for City Council 2015	9.26.15-B4	250.00
Diane Papan for Council 2015	9.26.15-B4	250.00
Ian Bain for City Council 2015	9.26.15-B4	250.00
Friends to Re-Elect Alicia Aguirre 2015	9.26.15-B4	250.00
Jeff Ira	9.26.15-B4	250.00
Shelly Masur for RWC Council 2015	9.26.15-B4	250.00
Monterey Bay CLC Labor Day Picnic	8.25.15-B3	300.00
<i>Available Funds - PACE</i>		240.86
<i>Available Funds - PAC</i>		171,013.96
<i>Available Funds - RETIREE</i>		10,120.00
		0.00

Issues		
Bank Balance as of 11/30/15		\$ 82,502.86
<i>Outstanding Deposits: Nov, Dec</i>		15,519.75
<i>Outstanding Motions:</i>		
Membership at Kern Medical Center	12.7.13-B3	5,158.39
Kern, Inyo and Mono Counties CLC Labor Day Bfast	8.25.15-B2	175.00
Kern County Contract Campaign	11.30.15-Poll	45,000.00
<i>Available Funds - PACE</i>		452.06
<i>Available Funds - PAC</i>		47,237.16
		0.00

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Karen Summers
cc: Officers for
officer mtg packet
in
Jan
2016

WORKING PARTNERSHIPS USA

Dear Luisa and the 521 leadership,

On behalf of Working Partnership USA's
staff and board - THANK YOU! Both for your
support of our 20th Anniversary but most importantly
for your partnership and leadership in this
county. Here's to another 20+ years!

With love, Derecka





SOUTHEAST ASIAN ASSISTANCE CENTER

2015 DEC -7 11:53

*cc: Karen Summers
For officers' mtg.
packet in
Jan 2016*

December 2, 2015

SEIU Local 521,

Thank you for your donation of \$350 to support the work of Southeast Asian Assistance Center (SAAC). In these challenging times for community organizations, your donation is a significant show of support for SAAC to maintain the vital programs and services we have available for the community.

SAAC often times provide programs and services that are not funded through any major grant funders. For example, we support the Asian Law Caucus' free immigration clinic once a month through hosting the clinic in our office, schedule appointments for community members needed legal advice on immigration issues and provide interpreting for community members who do not speak or have limited English language skills. SAAC continues to provide all the interpreting services for the Sacramento County Division of Mental Health and we assist refugees from many countries to access health care, legal, housing, immigration and other services.

If you should have any questions, please do not hesitate to contact me at (916) 421-1036. Again, thank you.

Sincerely,

Yang Xiong
Executive Director

SEIU Local 521 Officers' Meeting Motion

*** Motion Letter: B**

Date: January 26, 2016

Motion Title: Political Consent Agenda - (pages 59-60)

The Following Items have been placed on the CONSENT AGENDA for approval without discussion. If you wish discussion pull the item from the CONSENT AGENDA –

NO Motion is required to remove an item from the Consent Agenda.

Political Motions:

- **B/1 – Contribute to Cindy Chavez for Supervisor 2013 Santa Clara County – from the SEIU Local 521 Candidate PAC - (pages 61-62)**
- **B/2 – Contribute to Dave Cortese for Supervisor \$1,000 from the SEIU Local 521 Candidates Account - (pages 63-64)**
- **B/3 – Contribute \$10,000 to "Raise California's Wage and Paid Sick Days Act of 2016" Initiative from the SEIU Local 521 Issues Account - (pages 65-66)**

*** Motion B: To approve as presented ALL Motions on the Political Consent Agenda **EXCEPT** those pulled and listed below which will be held for discussion and approval or denial:**

Follow Up:

Moved by: _____ Second : _____

Pulled: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

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SEIU Local 521 Officers' Motion

Motion Number: B/1

Date: January 26, 2016

Motion Title: Contribute to Cindy Chavez for Supervisor 2013 Santa Clara County – from the SEIU Local 521 Candidate PAC

Recommended By: the San Benito and Santa Clara County COPE Committee on January 5, 2016

Background: Cindy Chavez was elected by a special election in 2013 to replace George Shirakawa as Santa Clara County Board of Supervisors. Cindy's seat is up for her second term. Cindy has been a champion of Labor for many years and she was previously the Executive Manager of the South Bay Labor Council. Cindy has been instrumental in helping us close our largest chapter contracts since she has been in the office. Additionally, Cindy was a leader in getting the first comprehensive living wage policy passed in the nation and helping us get the 1115 Waiver implemented at Valley Medical Center, one of the public hospitals that we represent. Cindy has been endorsed by the South Bay Labor Council and we endorsed her for her 2013 election.

Motion: To contribute \$1,000 to the Cindy Chavez for Supervisor 2013 from the SEIU Local 521 Candidates account

Make Checks Payable To: Cindy Chavez for Supervisor 2013, FPPC# 1356465
Address: 6950 Almaden Expressway, PMB 181
San Jose, CA 95120

Follow Up:

Moved by: _____ Second : _____

Amendment: _____

Amended By: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

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SEIU Local 521 Officers' Motion

Motion Number: B/2

Date: January 26, 2016

Motion Title: Contributions to Dave Cortese, Board of Supervisor Santa Clara County

Recommended By: the San Benito and Santa Clara County COPE Committee on January 5, 2016

Background: Dave Cortese, was a City Council member in San Jose who, when termed out, was elected to the County of Santa Clara Board of Supervisors in 2008. Dave has been an ally for our Union at the BOS. He lobbied, speaking out with us to get CALPERS to set aside \$800,000 specifically for California infrastructure projects.

Dave has been endorsed by the South Bay Labor Council covering Santa Clara and San Benito Counties. We endorsed Dave when he first ran for the Board of Supervisors back in 2008. Dave has been a partner with us over many issues important to our members at Santa Clara County Chapters and to working families. He has supported and fought to protect our defined benefit pension plans and was instrumental in getting a comprehensive living wage policy passed by the Board.

Motion: To contribute to Dave Cortese for Supervisor \$1,000 from the SEIU Local 521 Candidates Account

**Make Checks Payable To:
Address:**

Follow Up:

Moved by: _____ Second : _____

Amendment: _____

Amended By: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

LB:kns SEIU 521 CTW/CLC

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SEIU Local 521 Officers' Motion

Motion Number: B/3

Date: January 26, 2016

Motion Title: Contribution to "Raise California's Wage and Paid Sick Days Act of 2016" Initiative

Recommended By: the San Benito and Santa Clara County and Fresno COPE/Caucus Committee

Background: We are in the process of getting signatures for the above minimum wage initiative that will increase the minimum wage to \$15 by 2020. In addition, the initiative will provide six sick leave days for all workers in California. This initiative will increase the wages of our home care workers and any other workers (County, City and State workers) to at least \$15 an hour. This initiative is sponsor and supported by the SEIU State Council.

We are asking to contribute \$10,000 to this campaign because our Local has consistently fought for "Fight for 15" campaigns to improve the wages of our lowest paid workers. The \$10,000 contribution will allow us to have one representative on the steering committee for this initiative.

The Steering Committee or "Advisory Committee" is made up of organizations that are deeply involved and regularly engaged with their members or constituencies about the campaign, but do not have individual seats on the Executive Committee. Steering Committee members will have one (1) representative on the Executive Committee to ensure these partners have input into the decision making process.

The Steering Committee will consist of individuals acting as representatives of their respective organizations. To gain a seat on the Steering Committee, Labor organizations must commit a minimum of \$10,000.

In addition to having a vote on the Steering Committee and an appointed representative on the Executive Committee, the Steering Committee members will receive regular and occasionally confidential communication from the Executive Committee or Staff Leadership Team to ensure Steering Committee members are kept informed and engaged with the campaign.

Motion: To contribute \$10,000 to "Raise California's Wage and Paid Sick Days Act of 2016" Initiative from the SEIU Local 521 Issues Account.

**Make Checks Payable To:
Address:**

Follow Up:

Moved by: _____ Second : _____

Amendment: _____

Amended By: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

Karen Summers

From: Khanh Weinberg
Sent: Friday, January 08, 2016 12:38 PM
To: 521 All Staff
Subject: article on Friedrichs

Follow Up Flag: Flag for follow up
Flag Status: Flagged

Hi, All:

For those still struggling with what, exactly, is Friedrichs v CTA, below is a good article capturing the case. You can see the union challenge is overcoming the fake framing that people should have the 'freedom to choose.'

If you hear that, use this great quote in article to reframe what the real issue is:

"At the same that we are facing a near crisis in the elimination of the middle class, people are also trying to destroy one of the main vehicles to the middle class."

Mandatory Union Fees Getting Hard Look by Supreme Court By ADAM LIPTAKJAN. 8, 2016

FRESNO, Calif. — Harlan Elrich is a high school teacher in California, and that means he must pay about \$970 a year to a labor union. He teaches math, and he said the system did not add up.

"I get to choose what movie I want to go see," Mr. Elrich said. "I get to choose what church I want to go to. I get to choose what gym I want to join."

He should have the same choice, he said, about whether to support a union.

Mr. Elrich and nine other California teachers have sued the union, saying that they are being forced to pay money to support positions with which they disagree, in violation of the First Amendment. Their lawsuit, if it is successful, will be the culmination of a decades-long legal campaign to undermine public unions.

And there is good reason to think they will win. The Supreme Court, which will hear arguments in the case on Monday, has twice suggested that the First Amendment bars forcing government workers to make payments to unions.

"Because a public-sector union takes many positions during collective bargaining that have powerful political and civic consequences, the compulsory fees constitute a form of compelled speech and association that imposes a significant impingement on First Amendment rights," Justice Samuel A. Alito Jr. wrote for the majority in 2012 in one of the cases. Inviting a fresh legal challenge, he wrote, "We do not revisit today whether the court's former cases have given adequate recognition to the critical First Amendment rights at stake."

The new case is that challenge. The court's decision, expected by June, will affect millions of government workers of all kinds and may deal a sharp financial and political blow to public unions. (The ruling is unlikely to have a direct impact on unionized employees of private businesses, as the First Amendment restricts government action and not private conduct.)

"It's scary," said Steve Rosenthal, a former A.F.L.-C.I.O. political director, noting that "most of the growth in the labor movement over the last few decades has been in the public sector."

“It’s part of a concerted effort trying to dismantle the labor movement and to weaken worker’s rights in this country,” he added. “At the same that we are facing a near crisis in the elimination of the middle class, people are also trying to destroy one of the main vehicles to the middle class.”

Limiting the power of public unions has long been a goal of conservative groups, and some California teachers detected a political agenda in Mr. Elrich’s suit, which was organized by the Center for Individual Rights, a libertarian group partly financed by conservative foundations.

“It’s corporate special interests that are backing this,” said Reagan Duncan, a first-grade teacher in Vista, Calif. The core issue in the case is not free speech but basic fairness, she said, arguing that Mr. Elrich and the other plaintiffs sought to take a free ride on the union’s work, which includes negotiating for higher wages and better benefits for all workers.

“It’s not right for some people to get union benefits for free while others have to pay,” she said. “If I went to a grocery store, I wouldn’t walk out with my groceries and not pay while the guy behind me had to pay for my groceries and his groceries.”

Mr. Elrich said he could do fine without the union’s help. “I can negotiate for myself,” he said. “I’m a good teacher, highly respected, and I can go anywhere.”

Under California law, which is similar to ones in more than 20 other states, public employees who choose not to join unions must pay a “fair share service fee,” also known as an agency fee, which is typically equivalent to members’ dues. The fees, the law says, are meant to pay for collective bargaining activities, including “the cost of lobbying activities.”

Such fees are constitutional, the Supreme Court ruled in 1977 in *Abood v. Detroit Board of Education*. “To compel employees financially to support their collective-bargaining representative has an impact upon their First Amendment interests,” Justice Potter Stewart wrote for the majority. But, he wrote, “such interference as exists is constitutionally justified” to prevent freeloading and to ensure “labor peace.”

What crossed a constitutional line, though, he added, was forcing objecting workers to pay for “ideological activities unrelated to collective bargaining.”

Mr. Elrich said he got a refund of “between \$350 and \$400 a year” based on the union’s determination of what part of its activities were political. But he and the other plaintiffs say that everything the union does in negotiating with the government is political and that the *Abood* decision should be overruled.

“In this era of broken municipal budgets and a national crisis in public education,” a brief for the plaintiffs said, “it is difficult to imagine more politically charged issues than how much money local governments should devote to public employees, or what policies public schools should adopt to best educate children.”

“Yet California and more than 20 other states,” the brief continued, “compel millions of public employees to pay hundreds of millions of dollars to fund a very specific viewpoint on these pressing public questions.”

Karen Cuen, an elementary school music teacher in Chino Hills, Calif., and a plaintiff in the suit, gave an example. “I disagree with seniority-based layoffs, seniority-based school assignments,” she said.

Ms. Duncan, the first-grade teacher and union supporter, said the line between politics and collective bargaining was clear. “I do absolutely understand not wanting your money going to actual political campaigning,” she said.

“But when you think of politics, you think of political campaigns like school board races and ballot propositions,” she said. “I don’t think it’s political to care about working conditions as far as class size or your benefits.”

In the new case, *Friedrichs v. California Teachers Association*, No. 14-915, Solicitor General Donald B. Verrilli Jr., representing the Obama administration, urged the justices to leave the *Abood* ruling alone. Reaping the benefits of collective bargaining, he said, is not the same as being compelled to support a political position.

“The typical worker would surely perceive a significant difference between, on the one hand, contributing to a union’s legal and research costs to develop a collective-bargaining proposal for his own unit, and, on the other hand, making a political contribution to a union-favored candidate for governor,” Mr. Verrilli wrote.

Kamala D. Harris, California’s attorney general, told the justices in a brief that workers who object to the positions taken by unions suffer no First Amendment injuries because “they remain free to communicate their views to school officials, their colleagues and the public at large.”

There is no serious dispute that allowing workers to choose to pay nothing to the unions representing them would cause at least some workers to opt out, weakening unions’ financial clout.

“I am sure most will continue to pay their dues,” said Vincent Variale, a lieutenant in the New York City Fire Department’s emergency medical services division and a union official. “But we live paycheck to paycheck. It’s human nature that if you can get something for free you may take advantage of that. So there may be some people who do that.”

The plaintiffs were more sanguine.

“They might lose 10 percent, maybe 15 tops,” Mr. Elrich said, “but I think there’s enough people in the schools that are supportive of the unions that they would still be in the union.”

According to the plaintiffs, relying on slightly dated statistics, 9.7 percent of California workers represented by the National Education Association are nonmembers who pay agency fees rather than dues. If all of those employees stopped paying fees, their brief said, the union would still enjoy robust financial support and revenues in the hundreds of millions of dollars.

Ms. Cuen said the unions might need to improve to keep their members.

“If they’re worried about not getting forced money from everyone, what does that say about their product?” she asked. “So maybe if we win the case and they’re worried about people leaving in droves, they might need to improve their product and make it a little more user-friendly.”

In 2014, in *Harris v. Quinn*, the Supreme Court stopped just short of overruling the *Abood* decision, ruling only that the home health care aides who had brought the suit did not have to pay union fees because they were not full-fledged government workers.

In dissent in the 5-to-4 decision, which divided along ideological lines, Justice Elena Kagan suggested that her side had dodged a bullet. “Readers of today’s decision,” she wrote, “will know that *Abood* does not rank on the majority’s top-ten list of favorite precedents — and that the majority could not restrain itself from saying (and saying and saying) so.”

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Karen Summers

From: Luisa Blue
Sent: Wednesday, January 20, 2016 8:58 AM
To: 521 All Staff
Subject: Fwd: AIT4P Newsletter: January edition

Good Morning,

Here is the latest All In Together4Power membership report & articles of work that is being done by SEIU members around the country. Jan. 11th, the U.S. Supreme Court held their hearing on the Friedrichs vs CTA suit and was covered by the press. The California Attorney General, Kamala Harris, as well as Santa Clara County submitted documents supporting the Unions.

The U.S. Supreme Court will issue their decision between now and the end of June. Labor attorneys are in agreement that Labor will not prevail, it's all about votes and we do not have the votes on the Supreme Court. This week, I am at the SEIU Executive Board meeting and the Public Division Board meeting. We have heard from our Sisters & Brothers from SEIU Local 925 who represent childcare providers and public sector workers in Washington state and SEIU Local 503 who represent state workers; homecare workers & childcare providers on the work that the Freedom Foundation is doing to destroy the voices of workers. But the Freedom Foundation is not only attacking labor but environmental organizations; LGBT organizations; Planned Parenthood and other pro-working family organizations.

Yes, we will see a decrease in resources once the Friedrichs decision is made as we will become a voluntary organization (we will lose agency shop) and we will have to do our work differently. We have formed the Transformation Committee which will help us determine what needs to be done. It is clear that we will need to Create the Next Forms of Worker Power, Build a Wider Worker Movement that goes beyond our union members because we cannot do it alone, and we need to increase our ability to Innovate our Current Work.

No Supreme Court decision will not stop us from what we have to do!
UNITE FIGHT WIN!!

In Unity,
Luisa

Sent from my iPad

Begin forwarded message:

From: "Megan Sweeney, AIT4P Campaign Director" <megan.sweeney@seiu.org>
Date: January 20, 2016 at 8:59:38 AM EST
To: Luisa Blue <Luisa.Blue@seiu521.org>
Subject: AIT4P Newsletter: January edition
Reply-To: "janet.veum@seiu.org" <janet.veum@seiu.org>

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All in This Together 2015 Year in Review

2015 started with a bang when the DLB passed the All in this Together for Power resolution in January, A year later, local unions continue to build momentum and power, racking up policy wins for working people, signing up fair shares, forging coalitions, and maintaining an upward trajectory in the face of increasing attacks from wealthy special interests.

Reporting locals signed up more than 70,000 members and three locals -- 73, 721 and HCPA -- surpassed the 85 percent membership density goal set in the AIT4P resolution.

AIT Report: January 2015 to 2016 Comparison				
Public Sector Bargaining Units	2015 Card Signups	Jan 2015 Member Density	Jan 2016 Member Density	Change
SEIU Local 73	4,936	77.90%	85.04%	↑ 7.14%
SEIU Local 99	4,835	71.00%	76.11%	↑ 5.11%
SEIU Local 221	1,440	50.00%	53.01%	↑ 3.01%
SEIU Local 284	1,400	74.93%	78.27%	↑ 3.34%
SEIU Local 500	915	81.00%	81.88%	↑ 0.88%
SEIU Local 503 OPEU	5,134	74.80%	77.11%	↑ 2.31%
SEIU Local 517 (Bank draft units)	669	54.78%	48.28%	↓ -6.50%
SEIU Local 517 (Non-Draft units)		90.17%	94.17%	↑ 4.00%
SEIU Local 521	7,108	68.74%	71.56%	↑ 2.82%
SEIU Local 526M-MCO	504	95.82%	95.47%	↓ -0.35%
SEIU Local 668	1,922	81.66%	81.36%	↓ -0.30%
SEIU Local 721	17,451	79.00%	86.06%	↑ 7.06%
SEIU Local 1000	7,942	60.00%	61.11%	↑ 1.11%
SEIU Local 1021	9,665	76.40%	77.12%	↑ 0.72%
SEIU Healthcare Pennsylvania	517	78.40%	85.03%	↑ 6.63%
State Employees Assn of NH Inc	1,153	68.61%	70.15%	↑ 1.54%
ME State Employees Association	559	69.03%	71.73%	↑ 2.70%
CA State University Employees Union	2,270	65.00%	68.07%	↑ 3.07%
CT State Employees Assn	123			
SEIU Local 32BJ-PA	42			
CA Faculty Association Local 1983	1,708			
2015 Grand Total	70,293			

[Click to view the report as a PDF](#)

For an overview of all of our achievements in 2015, [check out the Year in Review](#).

In DC, Members #WorkTogether at *Friedrichs* Training and Supreme Court Action

On January 10 and 11, over 100 member leaders and Fight for \$15 activists converged on our nation's capital for an All This Together (AIT) mobilization and training where they learned about the specifics of the *Friedrichs v. California Teachers Association* case, what's really at stake, how to have conversations with friends, family members, and coworkers, and how to fight back against attacks on our union from big corporations and the wealthy few. At a communications training, members discussed their personal stories (and reasons for standing up) as well as best practices for talking to the media and for sharing information on social media.

Bright and early Monday morning, working people from all over the country joined together in front of the Supreme Court to tell wealthy special interests that they cannot silence our voice. Despite the cold and wind, spirits remained high. Hundreds of people, including many from our coalition of public sector unions, held signs of support and heard stories of hardships, victories, and determination. No matter what the court decides this year, we are building a movement to strengthen our communities and create a better future for our families.

Check out more awesome [pictures](#) from the steps of the Supreme Court!

Read blog posts from members [Anna Angeles-Farris](#) and [Peter MacKinnon](#) about why this cause is important to them.





Biweekly Report

Check out the new biweekly reports below for both the last period of 2015 and the first period of 2016. As mentioned earlier issue of the newsletter, the new chart format allows better information tracking over time, including the size of unit, and distinguishes between fair share conversions and new hires in many cases.

Biweekly Report December 16-31, 2015

Local	Public Sector Bargaining Unit size, Last 30 Days	Member Dues Payers, Last 30 Days	Dues Payers Percentage, Last 30 Days	New Hire Signups	Fee payer Conversion Signups	Total New Member Cards Collected	Exisiting Member Recommits	M2M Signups	COPE Cards Collected	CO Am
Local 99	33,458	25,603	76.52%	1	166	167	2	8	36	
Local 1021	50,505	39,421	78.05%	306	418	724			33	
Local 1984	9,952	6,848	68.81%		14	53		9	12	\$
Local 1989	10,002	6,703	67.02%	50	5	55				
Local 221	13,653	7,198	52.72%			75			3	
Local 2579	15,551	10,238	65.83%			290			104	\$
Local 284	8,806	6,417	72.87%	3	32	35	135		9	
Local 500	9,102	7,451	81.86%	0	7	7			12	\$
Local 503	26,857	19,439	72.38%			262	245	27	36	\$
Local 517M (bank draft units)	7,851	6,030	76.81%	6		6			2	
Local 521	39,493	28,015	70.94%	152	52	204			25	\$
Local 526M - MCO	6,790	6,495	95.66%							
Local 668	19,698	16,067	81.57%							
Local 721	87,112	74,916	86.00%			272			58	\$
Local 73	30,052	25,448	84.68%	103	68	189	18			
Local HCPA	2,881	2,437	84.59%	5	30	35		3	1	
Totals	371,763	288,726	77.66%	626	792	2374	400	47	331	\$1

Biweekly Report January 1-15, 2016

Local	Public Sector Bargaining Unit size, Last 30 Days	Member Dues Payers, Last 30 Days	Dues Payers Percentage, Last 30 Days	New Hire Signups	Fee payer Conversion Signups	Total New Member Cards Collected	Exisiting Member Recommits	M2M Signups	COPE Cards Collected	CO Am
Local 73	29,882	25,411	85.04%	21	8	33	4			
Local 99	33,669	25,624	76.11%	193	16	5	11	2	1	
Local 221	13,759	7,293	53.01%			33			2	
Local 284	8,205	6,422	78.27%	4	21	25				
Local 500	9,098	7,449	81.88%	8	5	13			7	
Local 503	26,857	19,439	72.38%			64	32	11	4	
Local 517M (draft units)	1,802	754	41.84%	11		11			6	
Local 521	39,306	28,127	71.56%	56	18	74			2	
Local 526M - MCO	6,755	6,449	95.47%							
Local 668	19,682	16,014	81.36%	45	56	101			60	
Local 721	87,093	74,956	86.06%			313			54	\$
Local 1021	50,794	39,170	77.12%	434	51	485			13	
Local 1984	9,865	6,920	70.15%		17	33		6	3	
Local 1989	10,096	7,242	71.73%	16	2	19			1	
Local 2579	15,585	10,608	68.07%			93			37	
Local HCPA	2,892	2,459	85.03%	11	9	20		3		
Totals	365,340	284,337	77.83%	799	203	1322	47	22	190	\$

[Click to view the report as a PDF](#)

Resources

Monthly Field Directors/Chiefs of Staff Calls: Second Wednesday

Staff and field directors are encouraged to join us the second Wednesday of each month for our call with staff and field directors about getting ready for “right to work.” Our next call is Wednesday, February 10, at 1 ET/10 PT. Call in: 888-8511 Meeting ID: 183-8636 Security code: 1111. Contact Megan Sweeney at megan.sweeney@seiu.org to receive calendar invitations.

Monthly Communicators Calls: First Thursday

Join local union communicators in the Public Division for regularly scheduled calls leading up to the announcement of Friedrichs decision. Next call is **Thursday, February 4**, at 3 ET/noon PT. Dial-in Number: (712) 432-1212 Meeting ID: 607-564-732. Contact Janet Veum at janet.veum@seiu.org or (202) 230-2143 for more information.

Smart Planning for Re-Signing, Adding Members Yielded Big Results for Local 284

Taking a good, hard look at their 140 bargaining units of school workers that average 65 people each and setting strategies to re-sign the most members as efficiently as possible paid off for Local 284 in 2015. Planning began by identifying which units staff had strong relationships with members and which had the strongest member leaders. Staff then worked with member leaders to set monthly goals in January, making steady progress throughout the year. Staff also had goals with share conversion, re-signing members, and COPE integrated into work already planned.

Planning drilled down to target shifts within buildings and identify when re-signing efforts would be best received at each unit, all in order to net the most members as quickly as possible. The result: membership density approaching 80 percent with re-signs at 61 percent.

Another factor: the membership base at Local 284 is aging and more members are reaching retirement age. A renewed focus on back-to-school orientations and trainings for new employees -- with presentations made by more stewards as part of the plan -- yielded 693 members from an estimated 694 new hires. The local has boosted membership every reporting period including the fall, a first in its history.

The best advice gleaned from these efforts includes:

- Because you can't do the work everywhere, start with your strongest bargaining units where you're most likely to succeed.
- “Chunk out” the work over time for staff and member leaders.
- Don't stir the pot at units with potential issues early on. Engage them later after some successes elsewhere.
- Focus efforts on big groups of potential new members or re-signs such as orientations and employee trainings.

- Make re-signs and sign ups part of the everyday work for staff over time rather than only during short, intense periods.

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1800 Massachusetts Avenue NW, Washington, DC 20036

This email was sent to: luisa.blue@seiu521.org

<http://action.seiu.org/unsubscribe>

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Karen Summers

From: SEIU 521 <communications@seiu521.org>
Sent: Tuesday, December 22, 2015 10:40 AM
To: Karen Summers
Subject: 2015 Year In Review #UniteFightWin

Follow Up Flag: Flag for follow up
Flag Status: Flagged



Karen,

As 2015 draws to a close, we can be proud that we stood up when it mattered: Fight for \$15; immigration reform; retirement security; quality affordable childcare; and more.

We are stronger and more committed than ever to putting Community First. At work and in our communities, we showed through our local actions and national campaigns for social and economic justice that we are all in this together for the safety, health and well-being of working people and families.

Go down memory lane to revisit SEIU Local 521's strongest moments of 2015:

<http://521.seiu.org/2015yiru>

Happy Holidays and Happy New Year!

SEIU Local 521

SERVICE EMPLOYEES INTERNATIONAL UNION LOCAL 521

www.seiu521.org

This email was sent to:
Karen.Summers@seiu521.org

To unsubscribe, go to:
<http://521.seiu.org/unsubscribe/seiu521actions>

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Year In Review: 2015



Service Employees International Union, Local 521 represents 41,000 public and nonprofit, private-sector employees in the central Bay Area region and in the Central Valley.

As 2015 draws to a close, we can be proud that we stood up when it mattered: Fight for \$15; immigration reform; retirement security; quality affordable childcare; and more. We are stronger and more committed than ever to putting Community First. At work and in our communities, we showed through our local actions and national campaigns for social and economic justice that we are all in this together for the safety, health and well-being of working people and families.

Go down memory lane to revisit SEIU Local 521's strongest moments of 2015.

Community First Contract Wins of 2015



Together, we won stronger contracts to help us recover from the economic downturn and stagnant wages we've endured since the Great Recession.

Our contract wins in the City of Santa Cruz, Fresno County, Kings County, Santa Clara County, Tulare County, and the Superior Courts of California all highlight the solidarity our members have shown over despite the challenges.



These 2015 contract wins, along with wins in other chapters, w members to continue the important work we deliver in our com every day.

New Chapters and New Members

Santa Clara Family Health Plan, BARC, and Community Child Care Council of Santa Clara County, Inc. (4Cs) joined the SEIU Local 521 family. As we enter the new year, we will continue the fight for strong first contracts!

American Red Cross workers of SEIU 521 joined colleagues from across the country to win the first ever national union contract in October, standing as a shining example of the power of collective bargaining.

In addition to our new chapters and the new coalition of Red Cross workers, 10,045 new members joined SEIU during the “Unite, Fight, Win” campaign in October. To our new members: Thank you for joining! You’re part of a union of people who build an economy that puts workers, students, families, and communities first.



Stewards Standing Up

All year, stewards stand up for our rights at work. This year was no different when stewards across the teamed up with CED (Contract Enforcement Division) to stop management’s unlawful acts. Stewards e workplace safety, the right to discuss employment matters with co-workers, and won members’ unpaid Read more victories here: www.seiu521.org/category/victories

Learn how to become a steward: www.seiu521.org/steward

In Remembrance of our Local 721 Brothers and Sisters



Our entire SEIU family mourns with the families of those aff attacks in San Bernardino on December 2, 2015.

SEIU 521 members and community members held candlelight San Jose, Campbell, Salinas and Bakersfield to remember the of which were SEIU 721 members.

You can contribute to the SEIU 721 Member and Family Support Fund at 721.seiu.org/SBfund.

Better Care for Children, Seniors and People with Disabilities

This year we made strides in the fight better child care services and home health care services.

In July, we won the reversal of the 7% cut in IHSS (In-Home Supportive Services) hours so our most vulnerable people and seniors can receive the care they need at home.

Our child care providers continue to be at the forefront of the fight to improve child care for the future of California. This year 14,000 more working families gained access to quality child care or preschools, and providers won an increase of 4.5% in the reimbursement rates (Regional Market Rates) for the subsidized child care they provide in their communities.



Funding for our Public Health Care System



In 2015, we helped secure up to \$7.2 billion over 5 years for our health systems through the renewal of the “1115 Waiver” program. This funding will help our public health workers transform our public health systems into systems of first choice and develop innovative programs that provide holistic care and reduce health care disparities for the most vulnerable in our communities.

“This is a victory not only for SEIU 521 members in our health hospital systems, but also for the most vulnerable in our community.”

-Enid Donato and Yvette Carreon, Natividad Medical Center

In October, The Kern Hospital Authority Bill (AB 1350) was signed into law by Governor Jerry Brown. We helped draft legislation that established Kern Medical Center as a stand-alone entity so staff can provide care for patients in their community.

Protecting our Public Libraries

This year, Kern County prevailed against continued threats of privatizing county libraries.

While the option is still on the table, county Supervisors backed off their hard public stance towards privatization.



We continue to fight and win these legal and political victories thanks to member contributions to our Committee on Political Education (COPE).



Higher Wages through Fight For 15 and Local Actions



SEIU 521 members showed solidarity with underpaid workers in Fight For 15 national actions in Fresno, Salinas, San Jose and Oakland on November 15 and November 10.

“Fight for \$15 is about lifting the wage floor and building a better future for everyone. We won’t stop until every hard working person is able to make enough to pay the bills and get the respect everyone deserves on the job.”

– Elba Arciniega, SEIU 521 member and Patient Business Services Clerk at Valley Medical Center



In Santa Clara County, we helped pass a comprehensive living wage ordinance in August that set an hourly wage of \$19.06 for public employees. The ordinance includes increases tied to cost of living, plus earned sick days and incentive pay for health and retirement coverage. It is the first living wage ordinance in the country to include fair work week provisions that protect workers from unpredictable work schedules which is a major cause of income instability and prevents workers from planning child care, getting a second

going to school.

Community Building for Immigrant Rights

In May, we formed the Committee on Comprehensive Immigration Reform to help undocumented workers to come out of the shadows, to stop the theft of their wages, the abuse of their labor, and other degradation they experience as a result of their lack of a legal immigration status.

“I work with children whose parents are ripped from them and deported. It’s wrong. If parents can be with their kids, it makes a huge difference in that child’s life.”

-Leticia Hernandez, Child Support Officer for Kern County



Partnering with dozens of community groups, SEIU 521 hosted a series of free resource forums on the Action for Childhood Arrivals (DACA), and pending Deferred Action for Parental Accountability (DAPA) programs. These programs could offer temporary relief from deportation for undocumented immigrant families can stay together in the U.S.

The Future of Labor



We also formed Children Over Politics of SEIU Local 521, a youth group for the next generation of activists fighting for civic engagement, equality, racial justice, and immigration reform.

We saw in 2015 that when workers stand and fight together, we face even greater challenges in the year ahead, we have to be even stronger.

The higher our membership, the more power we have at the bargaining table to win good contracts and help lift up our communities.

Join today as a full member of SEIU Local 521: www.seiu521.org/membership

Our victories are in large part thanks to our Committee on Political Education (COPE). COPE is an important part of our future and our voice in politics. Contributing to SEIU's Committee on Political Education allows in workers to band together to elect good leaders for city, county, state, and federal offices and to advocate for funding, and laws that protect our working families and our communities.

Sign up today to Unite, Fight, Win Together: www.seiu521.org/cope

Happy Holidays and Happy New Year!

SEIU Local 521

SEIU LOCAL 521

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SEIU Local 521 Officers' Meeting Motion

Motion Letter: C

Date: January 26, 2016

Motion Title: Approval of the Vendor for the Local's TeleTown Hall Meetings for 2016

Recommended By: Khanh Weinberg, Communications Director

Background:

This motion was heard by the Budget & Finance Committee who chose to send it on to the Officers because Khanh was unavailable to answer their questions during their meeting. Further information is now included in the motion and Khanh plans on being available for the Officers' Meeting should there be additional questions.

We have found that TeleTown Hall Meetings are a very positive means for distributing and receiving information to and from our members as well as other labor and progressive supporters regarding not only political issues but other crucial and time sensitive forums. As this will be a Presidential Election year there may be the need for more TeleTown Hall Meetings than has been typical.

We have received three bids for the TeleTown Hall Meetings we anticipate:

- 1) CHISM STRATEGIES – the bid is \$4,750 per event – if purchased individually and \$4,275 per event – if purchased as a bundle of 5 events.
- 2) BRUSHFIRE STRATEGIES – the bid is \$4,500 per event – if purchased individually and \$4,050 per event – if purchased as a bundle.
- 3) STONES PHONES – the bid is \$5,750 per event – if purchased individually and \$4,650 per event – if purchased as a bundle of 5 events.

SEIU 521 has used all 3 vendors over the years.

Brushfire seemed to be a smallish operation with high staff turnover. Every time we used Brushfire, from TTH to TTH, we dealt with new people not familiar with SEIU 521 and how we typically want our events to be run. This was the chief reason we discontinued Brushfire and turned to CHISM and STONES PHONES. Also, when we went on Brushfire's website to try tracking down info, their email/staff contacts did not work.

Last year we chose STONES PHONES. Between CHISM and STONES PHONES, CHISM offered better packaged rates. Therefore, this year my recommendation is CHISM STRATEGIES as our TTH vendor for all the above reasons noted.

Motion: To approve contracting with CHISM STRATEGIES for the Local's TeleTown Hall Meetings in 2016.

Follow Up:

Moved by: _____ Second : _____

Amendment: _____

Amended By: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

SEIU Local 521 Officers' Meeting Motion

Motion Letter: D

Date: January 26, 2016

Motion Title: Recording Policy and Confidentiality During SEIU Local 521 Governance Meetings

Recommended By: Luisa Blue, Chief Elected Officer

Background:

Making recordings of anyone without their prior consent is illegal in the State of California. SEIU Local 521 has not had a written Policy regarding recording people or meetings without express advance consent of the participants. We ask that the following Policy be approved and enforced in the future.

Recording Policy and Confidentiality During SEIU Local 521 Governance Meetings

No participant in an SEIU Local 521 Executive Board Meeting, Officers' Meeting, or Sub-Committee Meeting, whether a member of the Executive Board, member of SEIU Local 521, staff of the Local, observer, or other individual, shall make an audio or video recording of an SEIU Local 521 Executive Board Meeting, Officers' Meeting, or Sub-Committee Meeting, without the express advance consent of a majority of the Executive Board. This Policy shall be strictly enforced. Any complaint regarding an alleged violation of this Policy shall be swiftly brought to either the Executive Board or Officers for determination and remedial action at the next calendared Executive Board or Officers' meeting.

Additionally, due to the sensitive, controversial, and/or confidential nature of information that may be discussed during Executive Sessions of SEIU Local 521, audio or video recording of Executive Sessions is not allowed under any circumstances. Additionally, none of the information discussed in Executive Sessions may be shared with anyone inside or outside the Local, except other current SEIU Local 521 Officers, legal counsel or advisors or assistants to the Executive Board. Information discussed during Executive Sessions may include, but is not limited to litigation and personnel issues.

Motion: To approve the Recording Policy as stated above.

Follow Up:

Moved by: _____ Second : _____

Amendment: _____

Amended By: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

Statement of President Barack Obama
SEIU Community Candlelight Vigil
December 7, 2015
San Bernardino, California

Our hearts are broken over the terrorist attack that occurred at the Inland Regional Center – a tragedy that took the lives of 14 innocent Americans. We stand with the people of San Bernardino. We stand with the families who lost loved ones. And we stand with the SEIU family, as you grieve for 10 of your own members. These Americans were not only dedicated to serving their community. They were also dedicated to making sure that they and their fellow service workers had the chance to earn the middle-class lives they worked so hard for. They embodied the values that make America great.

We are still gathering the facts about what happened in San Bernardino – but we now know that the killers were terrorists who had stockpiled deadly weapons to kill innocent people. We know also know that we see this kind of violence too often – and we cannot accept it as normal in America, no matter how often it happens in America. Today, we mourn the beautiful lives of those we've lost. And as our nation comes together to help San Bernardino begin to heal, we must also come together against the kind of unspeakable violence that shatters too many communities. We have no greater obligation than to do everything in our power to keep our communities safe. That's how we honor the victims of this tragedy – and how we ensure that America stays the strong, resilient, free country we love. God bless those we've lost, and may He continue to bless the United States of America.

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Good news, Court has granted Cert in DAPA. Talking points and materials are being sent to your local communicators now. Below is President Henry's statement.

SEIU's Henry: Supreme Court has a chance to uphold justice in politically motivated lawsuit on DAPA/DACA+

WASHINGTON—*In response to the Supreme Court's decision to hear the appeal of the Fifth Circuit Court of Appeals' decision blocking President Obama's immigration executive actions, SEIU International President Mary Kay Henry issued the following statement:*

"At a crucial time when right-wing extremists are trying to manipulate the rules to further their own objectives by bringing politically motivated lawsuits before the Supreme Court to weaken and limit the rights of women, workers, voters and immigrants, the court has a chance to be on the right side of history. Instead of driving the same kind of politically motivated hate we have seen in the 2016 Republican political discourse, the court can uphold the values that have built our great nation and keep families together by upholding DAPA and expanded DACA. The choice is clear and the stakes could not be higher."

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SEIU Local 521 Officers' Meeting Motion

* Motion Letter: A

Date: January 26, 2016

Motion Title: Report Consent Agenda

The Following Reports have been placed on the REPORT CONSENT AGENDA for approval/confirmation without discussion. If you wish discussion pull the report from the REPORT CONSENT AGENDA –

NO Motion is required to remove a report from the Report Consent Agenda.

Committee Reports Requiring Approval/Confirmation: (as noted below)

1. Approval of the Minutes for the Officers' Meeting October 27, 2015 - (pages 5-8)
2. Notification of Officers' Email Poll Motion Regarding an emergency Staff cash out on 12/23/15. Approved – voting yes: Karen Nakatani, Alysia Bonner, John Gutierrez, RoseAnn Dominguez, Muriel Frederick; Matt Nathanson on vacation, Gwyn and Luisa do not vote.
3. Budget & Finance Committee Report – RoseAnn Dominguez, Local 521 Treasurer

January 20, 2016 Meeting – The Committee reviewed the October and November 2015 Financials and 2015 Budgets. - (pages 9-30)

- B&F Item 1 – Approved - The October and November 2015 Financial Documents
- B&F Item 2 – Withdrawn - Vendor for the TeleTown Hall Meeting Events in 2016. Will be heard at the January Officers' Meeting.
- B&F Item 3 – Withdrawn – Policy Regarding Submission of Motions, Information, and Reports for Budget & Finance, Officers', Executive Board Meeting Agendas..

Signed Motions - (pages 31-34)

4. **Good and Welfare Committee Report** – donations in December 2015 & January 2016: None
 - Please submit all Good & Welfare requests to both RoseAnn Dominguez and Karen Summers.

* **Motion A:** To approve/confirm as presented **ALL Reports** on the Report Consent Agenda **EXCEPT** those pulled and listed below which will be held for discussion:

Follow Up:

Moved by: Moved Second: Seconded

Pulled: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

Connie Chen

SEIU Local 521 Officers' Meeting Motion

* Motion Letter: B

Date: January 26, 2016

Motion Title: Political Consent Agenda - (pages 59-60)

The Following Items have been placed on the CONSENT AGENDA for approval without discussion. If you wish discussion pull the item from the CONSENT AGENDA –

NO Motion is required to remove an item from the Consent Agenda.

Political Motions:

- B/1 – Contribute to Cindy Chavez for Supervisor 2013 Santa Clara County – from the SEIU Local 521 Candidate PAC - (pages 61-62)
- B/2 – Contribute to Dave Cortese for Supervisor \$1,000 from the SEIU Local 521 Candidates Account - (pages 63-64)
- B/3 – Contribute \$10,000 to "Raise California's Wage and Paid Sick Days Act of 2016" Initiative from the SEIU Local 521 Issues Account - (pages 65-66)

* **Motion B:** To approve as presented **ALL Motions** on the Political Consent Agenda **EXCEPT** those pulled and listed below which will be held for discussion and approval or denial:

Follow Up:

Moved by: Moved Second: Seconded

Pulled: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

Connie Chew

SEIU Local 521 Officers' Motion

Motion Number: B/1

Date: January 26, 2016

Motion Title: **Contribute to Cindy Chavez for Supervisor 2013 Santa Clara County – from the SEIU Local 521 Candidate PAC**

Recommended By: the San Benito and Santa Clara County COPE Committee on January 5, 2016

Background: Cindy Chavez was elected by a special election in 2013 to replace George Shirakawa as Santa Clara County Board of Supervisors. Cindy's seat is up for her second term. Cindy has been a champion of Labor for many years and she was previously the Executive Manager of the South Bay Labor Council. Cindy has been instrumental in helping us close our largest chapter contracts since she has been in the office. Additionally, Cindy was a leader in getting the first comprehensive living wage policy passed in the nation and helping us get the 1115 Waiver implemented at Valley Medical Center, one of the public hospitals that we represent. Cindy has been endorsed by the South Bay Labor Council and we endorsed her for her 2013 election.

Motion: To contribute \$1,000 to the Cindy Chavez for Supervisor 2013 from the SEIU Local 521 Candidates account

Make Checks Payable To: Cindy Chavez for Supervisor 2013, FPPC# 1356465
Address: 6950 Almaden Expressway, PMB 181
San Jose, CA 95120

Follow Up:

Moved by: Moved Second: Seconded

Amendment: _____

Amended By: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

Connie Chew

SEIU Local 521 Officers' Motion

Motion Number: B/2

Date: January 26, 2016

Motion Title: Contributions to Dave Cortese, Board of Supervisor Santa Clara County

Recommended By: the San Benito and Santa Clara County COPE Committee on January 5, 2016

Background: Dave Cortese, was a City Council member in San Jose who, when termed out, was elected to the County of Santa Clara Board of Supervisors in 2008. Dave has been an ally for our Union at the BOS. He lobbied, speaking out with us to get CALPERS to set aside \$800,000 specifically for California infrastructure projects.

Dave has been endorsed by the South Bay Labor Council covering Santa Clara and San Benito Counties. We endorsed Dave when he first ran for the Board of Supervisors back in 2008. Dave has been a partner with us over many issues important to our members at Santa Clara County Chapters and to working families. He has supported and fought to protect our defined benefit pension plans and was instrumental in getting a comprehensive living wage policy passed by the Board.

Motion: To contribute to Dave Cortese for Supervisor \$1,000 from the SEIU Local 521 Candidates Account

Make Checks Payable To:
Address:

Follow Up:

Moved by: Moved Second: Seconded

Amendment: _____

Amended By: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

Connie Chen

SEIU Local 521 Officers' Motion

Motion Number: B/3

Date: January 26, 2016

Motion Title: Contribution to "Raise California's Wage and Paid Sick Days Act of 2016" Initiative

Recommended By: the San Benito and Santa Clara County and Fresno COPE/Caucus Committee

Background: We are in the process of getting signatures for the above minimum wage initiative that will increase the minimum wage to \$15 by 2020. In addition, the initiative will provide six sick leave days for all workers in California. This initiative will increase the wages of our home care workers and any other workers (County, City and State workers) to at least \$15 an hour. This initiative is sponsor and supported by the SEIU State Council.

We are asking to contribute \$10,000 to this campaign because our Local has consistently fought for "Fight for 15" campaigns to improve the wages of our lowest paid workers. The \$10,000 contribution will allow us to have one representative on the steering committee for this initiative.

The Steering Committee or "Advisory Committee" is made up of organizations that are deeply involved and regularly engaged with their members or constituencies about the campaign, but do not have individual seats on the Executive Committee. Steering Committee members will have one (1) representative on the Executive Committee to ensure these partners have input into the decision making process.

The Steering Committee will consist of individuals acting as representatives of their respective organizations. To gain a seat on the Steering Committee, Labor organizations must commit a minimum of \$10,000.

In addition to having a vote on the Steering Committee and an appointed representative on the Executive Committee, the Steering Committee members will receive regular and occasionally confidential communication from the Executive Committee or Staff Leadership Team to ensure Steering Committee members are kept informed and engaged with the campaign.

Motion: To contribute \$10,000 to "Raise California's Wage and Paid Sick Days Act of 2016" Initiative from the SEIU Local 521 Issues Account.

**Make Checks Payable To:
Address:**

Follow Up:

Moved by: Mourd Second: Seconded

Amendment: _____

Amended By: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

Connie Chew

SEIU Local 521 Officers' Meeting Motion

Motion Letter: C

Date: January 26, 2016

Motion Title: Approval of the Vendor for the Local's TeleTown Hall Meetings for 2016

Recommended By: Khanh Weinberg, Communications Director

Background:

This motion was heard by the Budget & Finance Committee who chose to send it on to the Officers because Khanh was unavailable to answer their questions during their meeting. Further information is now included in the motion and Khanh plans on being available for the Officers' Meeting should there be additional questions.

We have found that TeleTown Hall Meetings are a very positive means for distributing and receiving information to and from our members as well as other labor and progressive supporters regarding not only political issues but other crucial and time sensitive forums. As this will be a Presidential Election year there may be the need for more TeleTown Hall Meetings than has been typical.

We have received three bids for the TeleTown Hall Meetings we anticipate:

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Last year we chose STONES PHONES. Between CHISM and STONES PHONES, CHISM offered better packaged rates. Therefore, this year my recommendation is CHISM STRATEGIES as our TTH vendor for all the above reasons noted.

Motion: To approve contracting with CHISM STRATEGIES for the Local's TeleTown Hall Meetings in 2016.

Follow Up:

Moved by: Moved Second: Seconded

Amendment: _____

Amended By: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

Connie Chen

SEIU Local 521 Officers' Meeting Motion

Motion Letter: D

Date: January 26, 2016

Motion Title: Recording Policy and Confidentiality During SEIU Local 521 Governance Meetings

Recommended By: Luisa Blue, Chief Elected Officer

Background:

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Motion: To approve the Recording Policy as stated above.

Follow Up:

Moved by: Mourd Second: Seconded

Amendment: _____

Amended By: _____

Votes in Favor: _____ Votes Opposed: _____ Abstentions: _____

Motion: Carries Fails: Tabled Until: Date: _____

Signatures

Connie Chen