

EXECUTIVE BOARD MEETING AGENDA

March 19, 2011 Start Time: 10:00AM

A.	Call to Order – Gwyn Harshaw, President - 10:00AM – Open Forum Meeting starts at 10am. 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 10:15 which ever comes sooner. If members arrive before 10:15 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.
A-1	Responses to Last Meeting's Open Forum Issues - (pages 3-4) 1. CalPers termination of home loan policy
B.	Roll Call – 10:15AM quorum determined - (John Gutierrez) 1.
C.	<ul style="list-style-type: none"> ▪ Announcements: Thank you to Connor Murphy for his tremendous help in designing the new format for the Agenda Packets ▪ Support for Japan – suggest donate to the American Red Cross
D.	Review & Approve Minutes: - (pages 5-12) 1. Approval of Minutes from Executive Board Meeting – December 4, 2010. Minutes from the Officers' Meeting will be approved at their April Meeting
E.	Governance Issues: 1. Central Labor Council Updates: <ul style="list-style-type: none"> ▪ Motion 1 – Central Labor Council Delegates – Fresno Madera Tulare and Kings - (pages 13-14) ▪ Motion 2 – Central Labor Council Delegates Monterey Bay Central Labor Council - (pages 15-16) 2. Local By-laws Committee Report - (pages 17-18) 3. Evaluation from December 4, 2010 Executive Board Meeting - (pages 19-20) 4. SEIU Convention - (update)
F.	President Report: President Gwyn Harshaw - (Oral) 1. Please do your Ethics Training with the International 2.
G.	1st Vice President Report: 1st VP Carmen Morales - (pages 21-22) Regional Vice President Reports - (pages 23-28)
H.	Chief Elected Officer Report: Kristy Sermersheim 1. Any Update - (oral) <ul style="list-style-type: none"> ▪ Wisconsin Fight – (Presentation) ▪ Fight for a Fair Economy – (Presentation)
I.	Retirement Protection and Other Retirement Issues: Matt Nathanson Chair 1. Retirement Committee Report – Matt Nathanson - (pages 29-32 /oral) 2. Pension Fight – (oral)
J.	New Business: 1. Motion 10 – Support of Kern County Activists Attending State Democratic Convention - \$250 plus applicable taxes - (pages 33-34) 2. Motion 11 – Authorization to Partner with ACCE on Foreclosure Reform - (pages 35-46)
K.	Old Business 1. Report – status on the MRC - (pages 47-48)

L.	<p>Political Report: Riko Mendez, Political Director</p> <ol style="list-style-type: none"> 1. State Budget 2. Motion 3 – Scotts Valley Sales Tax Initiative – \$680 - (pages 49-50) 3. Motion 4 – Rose Ann Vuich Dinner – Tulare – COPE - \$1,000 (pages 51-52) 4. Motion 5 – Monterey Bay Central Labor Council Annual Awards Dinner Fundraiser – COPE - \$1875 - (pages 53-54) 5. Motion 12 – Supervisor George Shirakawa COPE Contribution – up to \$1500 - (pages 55-56)
M.	<p>Budget and Finance Report: RoseAnn Dominguez, Treasurer</p> <ol style="list-style-type: none"> 1. Review January 2011 Financials: <ul style="list-style-type: none"> ▪ Bank Balances - Document 1 - (pages 57-58) ▪ Income Statement - Document 2 - (pages 59-62) ▪ Organizing Income statement - Document 3 - (pages 63-64) ▪ Dues Receipts - Document 4) - (pages 65-68) ▪ Per Capita report - Document 5 - (pages 69-72) 2. Approved Budget from December 4, 2010 - (pages 73-76) 3. Motion 6 – Approval Corrected Proposed Draft Revised Budget for General Fund for 2011 - (pages 77-82) 4. Motion 7 – Approval Proposed Organizing Budget for 2011 - (pages 83-86) 5. Motion 8 – Acceptance of the 401(k) Audit report - (pages 87-108) 6. Motion 9 – Accept Reduction to the Unfunded Reserves Located in the General Fund - (pages 109-110) 7. Policy and Procedures for Development, Implementation, and Expenditure of SEIU Local 521 Budget – A subcommittee was formed from members of the Budget & Finance Committee; Officers and other Executive Board Delegates to formulating language around these subjects for acceptance at the June 25th Executive Board Meeting. - (oral) 8. Report back on questions to Finance - (pages 111-116) 9. Next Meeting of the Budget and Finance Committee: Wednesday April 20, 2011, OUR CURRENT AUDITORS WILL DO A PRESENTATION ON OUR FINANCIAL STATEMENTS FOR 2009 – at this meeting.
N.	<ul style="list-style-type: none"> ▪ Committee and Industry Reports: ▪ Social and Economic Justice Committee and Caucus Reports - (pages 117-122) ▪ Communications Committee - (pages 123-124) ▪ Nurse Alliance Statewide Industry Council - (pages 125-126)
O.	<p>Written Reports/Articles:</p> <ol style="list-style-type: none"> 1. Administrative Report – Pamela Rodgers - (pages 127-128) 2. Organizing Report – Catherine Balbas - (pages 129-130) 3. Education and Training Report – Beth Thomas - (pages 131-132) 4. Communications Report – Khanh Weinberg - (pages 133-152) 5. Information Technology Report – Don Brown - (pages 153-154)
P.	<p>Correspondence: Thank you from Fiesta Educativa, Inc. - (pages 155-156)</p>
Q.	<p>Adjournment:</p>

Calpers home loan program

- Calpers had a program in which people could get loans to buy homes.
- There were some advantages including people could use their retirement funds as the down payment and there were fewer fees.
- We learned that Calpers was going to vote to end allowing new people to join the program
- We investigated and spoke with Terry Brennan and Marguerite Young from SEIU and with the Board. In the end we agreed the board's decision was reasonable.
- The Calpers board voted to stop allowing new people to join because the problems now far outweigh the benefits
 - The program was no longer competitive and rates and terms are no longer special
 - The program was losing money
 - People who faced foreclosure lose their homes AND their retirement. Loans against pensions are recourse: if you default you are still obligated to repay the loan from your pension. That conflicts with the basic security characteristics of DB pensions.

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Minutes December 4, 2010 – Executive Board Meeting

Call to order by President, Gwyn Harshaw at 10:00am in Fresno

Officers Roll Call in Attendance at the Meeting:

Gwyn Harshaw	President	James Hackett	Region 4 Vice-Pres.
RoseAnn Dominguez	Treasurer	Greg Gomez	Region 5 Vice-Pres.
John Gutierrez	Secretary	Ellen Rollins	Region 6 Vice-Pres.
Matt Nathanson	Region 2 Vice-Pres.	Kristy Sermersheim	CEO
Henry Ildefonso	Region 3 Vice-Pres.		

Officers Excused from the Meeting:

Muriel Frederick Region 1 Vice-Pres.

Executive Board also in Attendance at the Meeting:

REGION 1:

Lynn Krug
Cheryl Easterbrook
Annette Ruiz-Vides
Roxanne Barnett
My Loi
Scott Johnson
Irma Compton
Karen Nakatani
Lesbia Reclosado
Martin Contreras
Rosemary Romo

REGION 2:

Diego Quevedo
Luis Aguilar
Max Stone
Nancy Elliott
Bobby Garcia
Diane Goldwasser

Debra Ladd

REGION 3:

Adam Gintz
REGION 4:
David Chavez
Brenda Flores
Josie Ruiz
Kevin Westbook
Sergio Garcia
Connor Murphy
Ronald Pazeian

REGION 5:

Robert Murillo
Rachelle Hill
Roy Harris
Carmen Morales
Wanda Wallace
Carolyn Woolfolk

Tammie Inman
Pamela Green
Betty Tonini
Vickie Jaurigui

REGION 6:

Myrna Bravo
Dolly Clemente
Raul Rivera

CAUCUS DELEGATES:

Robert Castillo
Carolina Valle

RETIREE DELEGATES:

Rachel Subega
Gary Linsner

Executive Board Members and Alternates – Excused:

Consuelo Moreno
Sam Avila
Emma Davis
Brian O’Neill
Lydia Torres
Ray Baeza
John Gilbert
Linda Sakata
Marianne Criswell

Delinda Robinson
Veronica Rodriguez
Gerry Fasth
Maura Guzman
Karyn Clark
Anna Casey
Billy Owens
Steven Rodrigue
Gloria Thompson

Joanne Hutton
Regina Kane
Antonio Cardona
Rita Castillo
Huong Chung
Conception Garay
Yong Ok Soung
Pao-Hsun Yeh
Carol Garvey

Executive Board Members and Alternates – Unexcused:

Carmen Vega-Martinez

Elsa Venegas

Kim Palmer

Francisco Quezada
Evelyn Carter

Darlyn Qualls
Shirley Dillard
Evelyn Carter

Tammy Dhanota

Local 521 Trustees in Attendance:

Socorro Alfaro

Rachel Welch

Gail Lancaster

Local 521 Trustees Absent:

Diana Calderon

Walt George

Linda Krolnik

Local 521 Staff in Attendance:

Tom Abshere

Karen Summers

Robert Li

Luisa Blue

Debbie Pate

Pamela Rodgers

Susan Strubbe

Local 521 Members in Attendance:

Richard Solis

Tony Brito

Audrey Carter

Jennifer Jensen

Jason Thompson

Jack German

James Charles

Carole Parkison

Call to Order – Open Forum for Member Presentations:

The Executive Board Meeting of December 4, 2010, was called to order by Gwyn Harshaw, Local 521 President, at 10:00am.

Open Forum Presentations:

1. Nancy Elliott announced that the CalPERs Board will be voting on December 15th whether or not to suspend their Home Loan Program. Their Investment Committee is proposing elimination of the program. She asked the Board for help stopping this elimination.
2. Lynn Krug spoke to the members in San Mateo and Santa Clara Counties. She asked, if they were interested in participating in a food drive at their worksite, to go to www.shfb.org (2nd Harvest Food Bank) and ask for a barrel to be delivered to their worksite. What she did was: get 10 barrel monitors, then call 2nd Harvest for delivery of the barrels for food next week and picked up of the barrels at the end of the drive. She said this can also be done with Invision an organization that facilitates a clothing drive for the homeless and children in February. If we, as a Union, participate in events such as this, we can tell our City Councils that we are participating in our communities.
3. Roy Harris brought a petition from his worksite at Kern County Medical Center asking if it is legal to spend our strike money on political campaigns. It was pointed out that the International Strike and Defense Fund designated for Local 521 and for many of the Legacy Locals has/had been used for this purpose several times in the past. In fact, the form from the International actually uses this source of money is an option for paying the American Dream commitment.

4. RoseAnn Dominguez stated that the Fresno Housing Authority had just finished bargaining their contract and the Management Team has given each member of the SEIU bargaining team an award. We don't expect positive things from management but sometimes they surprise us.
5. John Gutierrez announced that the 2nd President of Legacy Local 715 passed away last week. Kristy said Dominic Catalano was the gentlest man she has known and that his son is and his daughter was a union member. In 1980 he had gone to the International Convention in New York and tried to have the Union name changed from to Service Employees to Service Workers International Union because he said employees have problems, but workers do things. He had wanted to die in Sicily. There was a moment of silence. The meeting will be adjourned in his honor. Flowers were sent and a number of staff and members will be attending the funeral.

Housekeeping/Credentialing/Member Protection/Updates:

Gwyn announced that she is on call today.

1. Roll Call - The Secretary determined that a quorum of the Executive Board was present.
2. Rachel Subega and Gary Linsner were sworn in as Executive Board delegate and alternate representing the Retiree Chapter.
3. The Trustees' Reports are in the Packet.
4. Approval by the Executive Board of the October 18, 2010, Executive Board Meeting minutes.

Motion: to approve the October 18, 2010, Executive Board meeting minutes as written.

Duly moved; Seconded; Passed

5. Appointment of the SEIU Local 521 First Vice President:
 - The Trustee Report was in the Packet along with the approved Policy for Selection, the Candidate Statements and Withdrawal, and the basic Process for selection.
 - The Board made several rulings:
 - The candidates would be sequestered during a questioning time.
 - All questions directed to the candidates would be the same.
 - The Board would select 3 questions and 3 individual Board members would ask one question apiece.
 - The candidates would have 60 seconds to answer each question and 60 seconds for a summary. There would be a timekeeper.
 - Literature would be allowed outside the building in the parking lot, but not inside.
 - The two remaining candidates who had requested appointment by the Board to the Office of 1st Vice President were questioned by the Board.
 - Nominations and seconds were made for both Carmen Morales and Richard Solis.
 - A hand vote was taken and counted by the Trustees and the Secretary.
 - Carmen Morales was determined the winner of the hand vote.

Motion 1: Appointment of SEIU Local 521 – 1st Vice President

Motion: To authorize the appointment of Carmen Morales to the position of 1st Vice President of SEIU Local 521.

Duly moved; seconded; passed as presented.

- Carmen Morales was sworn in as 1st Vice President of SEIU Local 521.

6. Set Officers' and Executive Board Meeting Dates for 2011.

Motion 2: Schedule for Meeting Dates of the Officers and the Full Executive Board for 2011.

Motion: To accept the following dates for Executive Board Meetings:

Saturday March 19, 2011 from 10am – 3pm in Fresno,

Saturday June 25, 2011 from 10am – 3pm in Fresno,

Saturday September 24, 2011 from 10am – 3pm in Fresno,

Saturday December 3, 2011 from 10am – 3pm in Fresno,

To accept the following dates for Officers' Meetings:

Tuesday January 25, 2011 at 6:00pm

Tuesday February 15, 2011 at 6:00pm

Tuesday April 26, 2011 at 6:00pm

Tuesday May 24, 2011 at 6:00pm

Tuesday July 26, 2011 at 6:00pm

Tuesday August 23, 2011 at 6:00pm

Tuesday October 25, 2011 at 6:00pm

Duly moved; seconded; passed as presented.

7. Resignations and Appointments.

Motion 3: Confirmation of Delegate Seats at the San Mateo Labor Council.

Motion: To confirm the deletion of Dana Amongol as delegate to the San Mateo Labor Council and notify the CLC of that action.

Duly moved; seconded; passed as presented.

8. Retiree Bylaws – Rachel Subega reported that there is a lot going on in PERS and Social Security. She said that the Retiree group is very active.

9. Budget and Finance Committee Meeting for December 8th is canceled.

10. The Officers' Meeting for December 14th is canceled.

11. CalPERS Homeloan Program Possible Suspension

Motion 11: Support Continuing the CalPERS Homeloan Program.

Motion: SEIU 521 support the CalPERS Homeloan program. To notify our lobbyist and write a letter to maintain the Program. Intent is to support, but if with research, problems arise we will get back to the Officers.

Duly moved; seconded; passed as presented.

Updates and Reports:

1. Committee on Absences of Executive Board Delegates

Motion 4: Implementation of Some Recommendations from the Committee on Absences of Executive Board Delegates.

Motion: To implement the recommendations from the Committee on Absences of Executive Board Delegates as outlined in the attached document "Implementation of Some Recommendations from the Committee on Absences of Executive Board Delegates.

In Summary these procedures give the responsibility to the 1st VP of each Region to follow-up with absent Executive Board delegates in his/her Region.

Duly moved; seconded; passed as presented.

2. Reminder International Ethics Training is a requirement
3. Update on Valley Benefits – The note has been signed and the 1st payment received for more than the payment amount; any overages go toward their balloon payment at the end of the term.
4. Regional Vice Presidents' Reports in the Packet
5. Kings County and Bill Shawhan were briefly discussed.
6. Committee and Industry Reports were in the Packet.
7. Written Staff Reports in the Packet.
8. 2011 Local 521 Convention was not discussed.

Lunch was served

Political: Kristy spoke on behalf of Riko Mendez, Political Director, as he is re-cooperating from surgery. She expressed that Jerry Brown had asked 5 heads of Union Locals and 2 staff to meet with him for 2.5 hours last Thursday evening about the State Budget. He gave his personal cell number to the SEIU State Council staff person and hopes to have an approved Budget by March. He is hoping to continue the current taxes in June. He would like to fix the sustainable issue as well.

1. American Dream Money for Presidential Campaign – Motion 5 – Tabled from the October 18th Executive Board Meeting.

Motion 5: American Dream Money to Elect a Presidential Candidate Following Our Ideals

Motion: To authorize President Gwyn Harshaw to pledge our commitment to the American Dream (with discounts) Option 2 in accordance with decision of the Budget and Finance Committee, to be taken from our Strike & Legal Defense Fund held at the International Union in our name.

Motion amended by maker; passed.

Delegates were concerned about a contingency plan if we should have a strike. Kristy said that members are more thoughtful about how they withdraw their labor when strikes are a possibility. We do have a strike fund with the Local and money

will still go to the International and be set aside into the strike and defense fund held there.

Matt Nathanson pointed out that this happens with each election, and he would like money set aside for this purpose in advance.

2. COPE Candidate PAC Motion 6 - \$165 for San Mateo CLC Event

Motion 6: San Mateo County Central Labor Council – Labor’s Holiday Party - \$165 – Candidate PAC

Motion: To approve payment of \$165 from the SEIU Local 521 COPE Candidate PAC for three tickets to the annual Labor’s Holiday Party on December 3rd hosted by the San Mateo County CLC and the San Mateo County Building Trades Council.

Moved; seconded; passed as presented.

3. Motion 9: Henry T. Perea for Assembly - \$1,000 – Candidate PAC

Motion 9: Henry T. Perea for Assembly - \$1,000 – Candidate PAC

Motion: To contribute \$1,000 from the SEIU Local 521 candidate account to the campaign of Henry T. Perea for Assembly.

Moved; seconded; passed as presented.

4. Motion 10: Tony Campos Campaign Debt - \$500 – Candidate PAC

Motion 10: Tony Campos Contribution - \$500 – Candidate PAC

Motion: To contribute \$500 from the SEIU Local 521 candidate account to pay off the campaign debt of Tony Campos.

Moved; seconded; passed as presented.

5. PAC/PACE balances in the Packet.

Report of the Treasurer: RoseAnn Dominguez

1. RoseAnn did not go over the Financial Statements, but instead discussed the draft Budget for 2011.

The Local has a “structural deficit”. We have not bounced checks and have kept people working, but the Local has been using some of its allocated monies as float for cash flow. Ming is working on a document to tell the Board at either the January or March meeting where the Local stands.

Moved to approve the Treasurers Report including Motion 7 and 8 as submitted.

Duly moved; seconded; passed.

2. Motions Approved by the Budget and Finance Committee that Need NO Action by the Executive Board

a. Approved – Kristy to sign Resolution Changing two sections of the Staff 401k to remain in line with the intent of the document

b. Tabled – IT requested 2011 Budget Items – there are additional items that must be purchased.

- c. Approved – MPLS Conversion Implementation Process.
 - d. Approved – send “stale” checks except check #12224 to the State as required by law.
 - e. Approved – Reimbursement of \$71,508 back to the Organizing Fund from the General Fund – required after results of 2008-2009 audit.
3. Motion 7: Use Electronic Payment Options for Recurrent Vendors Rather than Live Checks.

Motion 7: Use Electronic Payment Options for Recurrent Vendors Rather than Live Checks

Motion: To authorize the Local to pay recurrent vendors’ bills/invoices by electronic options rather than by using live checks.

Moved; seconded; passed as presented.

4. Plan for 2011 Budget Process – Motion 8

The delegates asked what the affect on the deficit would be if service fee payers were converted to members. Ming is looking at a document to provide that information.

There are unknowns that affect the Budget that cannot be determined at this time.

Motion 8: Approval of the Proposed 2011 Budget

Motion: To accept the proposed 2011 Budget with the proviso that it will be revisited and adjusted on a monthly, quarterly, or as needed basis.

Moved; seconded; passed as presented.

Economic Crisis and What SEIU is Suggesting We Do:

A break out presentation was done with two groups. One group explored – What would it look like to make life better for our kids and how would we get there. The second group explored – What are we doing now for union activity.

We are going to have to look at our work in a different way; possibly by seeing a bigger picture, although individual actions and educations that direct our point of view are still a piece of the puzzle. Different people will do different things toward a common goal. There is much to be done and many will have to work together to accomplish this daunting task. The International is looking for 200,000 people to do this diverse work in varying ways. We have about 300 members actively participating doing steward work. We still will need 4700 more people actively participating doing something that will help with the mission of improving the lives of workers and their families for the future. There is room for everyone to do something. Everyone has something that is important to them.

Social and Economic Justice Reports:

Our newly appointed 1st Vice President chaired the meeting from this point.

The Social and Economic Justice Reports were in the Packet. No additional comments were made.

Correspondence: Thank you notes were in the Packet

Adjournment: Next Executive Board Meeting is scheduled for Saturday, March 19, 2011 in Fresno from 10am – 3pm.

Motion: To adjourn this meeting at 3:04pm in Honor of Dominic Catalano.
Duly moved; seconded; passed.

Surveys were distributed to help determine what additional changes the Board would like to help the process of meetings.

SEIU Local 521 Executive Board Motion

Motion Number: 01

Date: March 19, 2011

Motion Title: Confirmation of Delegate Seats at the Fresno-Madera-Tulare-Kings Labor Council

Recommended By: Luisa Blue, Staff Director; Tom Abshere, Area Director; Jesse Lifton, Political-Community Organizer

Background: Some Delegates from the staff of SEIU Local 521 are being removed as delegates to the Fresno-Madera-Tulare-Kings CLC.

Motion: To confirm the deletion of Gene Garcia (no longer employed with Local 521), Robert Li, Sue Madaus, Delaina Contreras, as delegates to the Fresno-Madera-Tulare-Kings Labor Council and notify the CLC of that action.

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 Executive Board Motion

Motion Number: 02

Date: March 19, 2011

Motion Title: Confirmation of Delegate Seat(s) at the Monterey Bay Labor Council

Recommended By: Monterey County COPE Committee

Background: On March 3, 2011, the Monterey County COPE Committee voted to nominate Justin Light for approval by the SEIU 521 Executive Board to the position of Delegate to the Monterey Bay Central Labor Council.

Motion: To confirm the appointment of Justin Light to the Monterey Bay Central Labor Council and notify the CLC of that action.

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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Bylaws Committee Report **March 2011**

The Local Bylaws Committee met on Monday, March 14, 2011. In attendance were Dolly Clemente, Lydia Torres, Greg Gomez, Scott Johnson and Pam Rodgers.

This Committee reviewed the Tulare County and Monterey County Bylaws and it was determined there were enough issues with both submitted bylaws that the Committee wanted to have further discussions.

Both Chapters must elect their negotiating teams for contract bargaining immediately. They were advised to appoint an Election Committee and conduct a democratic and honest election of only their negotiating team. The Local Bylaws Committee will continue their work on the Tulare and Monterey County submitted Bylaws.

Update on other Chapter Bylaws:

1. There are two Chapter's Bylaws returned to their Chapter Bylaws Committees for revisions: the Retiree Chapter Bylaws and the Fresno County Chapter Bylaws.
2. The Local Bylaws Committee is waiting to receive the Bylaws for Kern County Courts.

The next meeting is set for April 11, 2011, video conferencing will be provided at 5:30 pm among the Fresno, Visalia, Salinas and San Jose offices.

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EVALUATION SUMMARY SEIU LOCAL 521 EXECUTIVE BOARD MEETING DECEMBER 4, 2010

At the December 4, 2010 Executive Board meeting, we gave the Delegates a survey to provide feedback on the meeting. We received 37 surveys, and this is the summary of them.

Top Answers

- 1) What did you like?
 - Everything
 - Breaking into small groups
 - Guest speakers
 - Smooth VP election
 - Good participation

- 2) What did you dislike?
 - Nothing
 - Too much paper
 - Meeting too long
 - Comments took too long
 - Dream Act exercise was unclear

- 3) Suggestions to improve the meeting?
 - Check audio and tech equipment beforehand
 - Keep commenters to a stricter time limit (appoint a Parliamentarian)
 - Laminate the vote cards to reuse each meeting
 - Utilize technology to cut down on paper
 - Move the location to different offices

- 4) Did you like the food?
 - Everyone checked YES
 - One person thought it was overcooked, but still good

- 5) Any other comments?
 - Staff did a great job!
 - Meetings are becoming more cohesive
 - Good meeting overall
 - Evaluations are a good idea
 - Saw an improvement in the President's control of the meeting

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SEIU LOCAL 521 – MARCH 6, 2011
REGION 2 VICE PRESIDENT’S REPORT
FOR MARCH 2011 EXECUTIVE BOARD MEETING
SUBMITTED BY MATT NATHANSON, REGION 2 VP

REGIONAL ACTIVITY – On February 16, over 70 leaders and staff from Region 2 met in the Castroville Library for our second region wide leadership meeting. To give you a measure of our progress, our first regional leadership meeting was about 15 people in a pizza parlor. The meeting focused on the common issues we all face: upcoming challenges in negotiations and budget hearings, pension reform, the Fight for a fair economy, and the need to mobilize in support of a June special election to extend existing revenues to raise \$12 billion towards solving the California State budget deficit.

In Region 2 we have also scheduled membership trainings in all three of our counties on the State Budget, and Communications Trainings for working with the media during contract and budget campaigns. These trainings will occur in March and April 2011. We also intend to schedule trainings in all three counties on pension reform. All three counties now have a published schedule of steward trainings for 2011.

CHAPTER HIGHLIGHTS – Virtually all of our chapters are either in contract negotiations, or preparing for them. I want to single out a few highlights from the past three months:

SAN BENITO COUNTY – There has been some amazing work in San Benito County, the smallest of the three Counties in Region 2. The County Chapter which represents just over 300 people (only about half of them members) held a meeting on February 8 that attracted over 100 workers. Maybe that’s because they met in a winery! A few days later they were marching in the streets on the County administration building to protest budget cuts. Kudos to their new elected leadership, including Chapter President Martha Booker. I will try and attach a couple photos from these events to my report.

MONTEREY COUNTY – SEIU members from the two legacy locals 535 and 817 have met and drafted new by-laws that will hopefully be submitted for approval this month. This will further unify our members in Monterey County and allow for new unified leadership elections.

SALINAS – City workers from all 3 bargaining units participated in a successful action at the City Council to challenge the council to find other ways to balance the budget besides automatically cutting wages and benefits.

SALUD PARA LA GENTE – In December, the Union successfully won an arbitration overturning the wrongful termination of one of our members and winning back pay.

MEMBERSHIP AND COPE NUMBERS – I have attached a snapshot spreadsheet of our membership numbers from sample chapters in our 3 counties. You can see the changes from January 2010 to February 2011. We are seeing some increase in non-members in Monterey County and Courts, and a decrease in non-members in Santa Cruz County and San Benito County. We picked up several new members in San Benito County at their big membership meeting in February. I also want to call attention to the high rate of COPE membership in Monterey County – almost 25% of their workforce is in COPE.

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SEIU 521 Region 2 Sample Membership Summary

Jurisdiction	Jan-10			Dec-10			Feb-11			COPE #	% COPE
	# Membs	# Non-Membs	% memb	# Membs	# Non-Membs	% memb	# Membs	# Non-Membs	% memb		
SCruz Co.	1618	63	96.3%	1518	62	96.1%	1468	51	96.6%	138	9.1%
Mont Co	2291	305	88.3%	2232	405	84.6%	2370	364	86.7%	647	23.7%
SB Co.	147	167	46.8%	148	163	47.6%	164	150	52.2%	24	7.6%
SCruz City	464	63	88.0%	476	80	85.6%	371	64	85.3%	57	13.1%
Salinas City							108	115	48.4%	21	9.4%
Hollister City	37	6	86.0%	32	7	82.1%	34	7	82.9%	4	9.8%
Scruz Metro	94	0	100.0%	88	1	98.9%	87	2	97.8%	11	12.4%
MV/SB Transit	80	0	100.0%	98	0	100.0%	97	0	100.0%	0	0.0%
Scruz Courts	112	1	99.1%	87	1	98.9%	89	1	98.9%	12	13.3%
Mont Courts	105	37	73.9%	99	44	69.2%	98	44	69.0%	12	8.5%
SB Courts							13	13	50.0%	1	3.8%
Salud PLG	118	0	100.0%	104	0	100.0%	149	0	100.0%	8	5.4%
SLV Unified SD	107	1	99.1%	102	0	100.0%	107	0	100.0%	5	4.7%

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Region 6 Vice Presidents March Report
Blessings Sis Ellen Rollins, SEIU Region 6 VP

This is beautiful, click on the link below and enjoy.

Subject: A Classic

> >>> > Below is a link to one of the best pieces of sound
> >>> > engineering work ever.
> >>> > It is a composite audio/video of song whereby additional
> >>> > tracks were laid in by different singers and musicians
> from different places around the world.
> The song itself is that classic standard "Stand By Me"
> originally released in 1955 by The Staple Singers and released by Drifter's
>>>>>> 1961. [TURN THE SPEAKERS UP FOR THIS ONE! ITS AWESOME!](#)
[AWESOME](#)

[Click here: Michael Moore Speaks in Wisconsin: 'America is not Broke' - E.D. Kain - American Times - Forbes](#)

Bro & Sis.

With all that is occurring to workers from Wisconsin to California as VP and your voice in the greater political arena, leaders & I have been extremely active. Participating on IHSS Coalition Boards, at Conferences and on Collaborative Calls weekly. We travel back and forth to Sacramento; your leadership and co-workers across the state, filling up legislative hearing rooms fighting for the best outcome for Home Care here in California ever since the end of January. I am also email blasting on behalf of SEIU in Wisconsin in solidarity for workers everywhere as we attend rallies against what is appearing to be a blatant attack on public worker's the last strong hold of labor actions.

We will continue to fight to push back this Governor's harsh budget on Public Sector workers. Not like Wisconsin, thanks to Arnold's mismanagement, California has a real budget deficit and SEIU has been working diligently with the Coalition partners to find alternative revenue's, most significantly we have won the removal of the domestic service cuts to the consumer hours and consumer finger printing. Appears Adult Day Health care is revamped into KAFI DHCS Program.
San Mateo Co IHSS had ratified its contract and elected new officers.

As our common cause remains with Wisconsin we need to fight for fair taxation on corporations, rich and working people alike. We will continue to find appropriate solutions to CA Budget Needs and not only on the necks and backs of middle class working men & women.

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Region 6 Report

March 2011 Robert Li SEIU 521 IHSS Director

State Budget: Homecare Alternative Solutions Pass Both Houses in Trailer Bill

- The long term care division of SEIU in CA succeeded in proposing alternative solutions to confronting the \$486 million funding reduction proposed by Governor Brown. These include:
 - Caseload Savings – credits homecare with past caseload reductions
 - Community First Choice Option – a new Medicaid state plan that will bring in 6% more in revenues for our services
 - Medication Compliance – reduces the medication non compliance and reduces usage of nursing facilities.
- Our clients did take a hit with the medical certification requirement which will prevent access to home care services for some of our clients. They anticipate \$152 million is reduced services as a result of this proposal.
- The trailer bill is expected to be signed by the Governor.

Fair Economy: Homecare Workers take Fair Economy to the Street

- March 3 – SEIU 521's homecare division kicked off the first Fair Economy action of SEIU 521 on March 3 by turning out next to 70 workers joined by county and school employees to push for a California to pass a fair budget at the state and shape a better economy than follow the path set by Wisconsin .
- March 16 – Homecare division followed the action with an even stronger action the following weeks, where they went on the offensive to point to the public that the banks were the cause of the crisis and should be held accountable. Nearly 80 workers attended with a broad based coalition, including ACCE, Labor Council, USWW, UFCW5, and SEIU 521.

San Mateo IHSS: San Mateo Homecare Workers Settle Historic Contract in Turbulent Times

- After months of Negotiations, San Mateo Home Care Providers have ratified their contract that essentially provides historic protections to their wages despite looming threats from the state. Essentially, we were able to get the County to agree to language that would increase their hourly contribution to provider wages an additional \$0.51/hr. we find that this amount of additional funds would potentially absorb a State wage cut from \$11.50 to \$9.70/hr, allowing our members here to still earn at around 11.50/hr (approximation). Any wage cuts exceeding this additional County contribution will then be absorbed by the providers.

HOPE Services: Takeaways End and Contract Benefits Remain in Tact

- Nonprofits have been hit by serious concessions due to dropping revenues. HOPE was no exception. Workers agreed to furloughs in the past. However, members were able to negotiate to have the concession expire at the end of March of this year while retaining all their current contract language with no takeaways. Members were able to ratify their contract as of last week with 100% support.

REPORT FROM SEIU PUBLIC SECTOR RETIREMENT SECURITY MEETING
FEBRAURY 24-25, 2011, WASHINGTON D.C.
SUBMITTED TO SEIU 521 PENSION COMMITTEE BY MATT NATAHNSON

I had the opportunity to attend a meeting in Washington DC with SEIU leaders from different Public Sector Locals around the country on the issue of public sector pensions and retirement security. I feel like I got a ton of information, and I promise not to try and restate it all here. But I did want to try and share a summary of the highlights. The meeting started (and ended) with a discussion with our International President about what SEIU is already doing and where we still need to go. She started the meeting by saying, "Thank God For Wisconsin" - The events in Wisconsin over the past few weeks have helped to reframe the public debate from being simply about health and pension benefits. This is about a fight for the survival of the middle class. The attack on public services and public workers' compensation is now clearly seen to be a partisan attempt to attack the middle class and create an America without unions to defend it. If this is not a call to action, I do not know what is.

Mary Kay described the efforts going on now to get the major unions to work together on the issue of pensions. In fact, the president of the American Federation of Teachers (AFT) showed up at our opening night discussion. The campaign has 3 basic ideas:

- 1) Defend and reform existing defined benefits pensions to make them sustainable going forward for existing members;
- 2) Develop a rapid response team funded by all the major unions to counter attacks on pensions at the state and national (and local?) level;
- 3) move the discussion to a fight to develop a retirement security/pension system for every worker in the country, public and private sector

1) Defend and Reform Existing Benefit Plans:

- There is a lot of conflicting information about the health of current benefit plans, but it was clear to me that there are some states where the pension plans are severely underfunded. It is also clear that in California at the State and Local level, many of our plans are much better than other states, and there are many Locals that have already been pushed to make serious pension cuts and changes. For example, in Michigan, they lost their defined benefit pension plan in 1999 for all new hires, and now this year they have more state workers who are out of the plan than in it.
- In California, while we are currently 83% funded in the CalPERS plan (over 80% is considered good), there is a coming crisis. The economic recession of the past three years caused the majority of the underfunding in the pension plans, but will be exacerbated by the effects of the "pension holidays" of the late 1990's/early 2000's when employers did not make contributions every year, and the benefit improvements that most plans negotiated. Going forward, depending on the rate of return on PERS investments, fully funding the state pension obligation is projected to cost the state 7.3% to 12.5% of its annual budget (average for all states this year of actual expenditures is 3.8%).

- Some of the ideas for defending existing pensions and making them sustainable are as follows:

- * no pension spiking
- * no double dipping by pensioners
- * develop a pension benefits cap
- * require employers to make contributions every year (no pension holidays)
- * end programs that subsidize retirement credits (air time, retroactive benefit improvements, credits for military time)
- * limit liability to pension funds around COLA's
- * bar pension fund managers from then going to work for investment brokers

Another group that presented added these recommendations:

- * Increase full retirement age of plans (there is a disconnect with the public when our plans let us retire at 55 vs 65-67 with Social Security)
- * Move away from final year or single highest year in formula (helps prevent spiking)
- * Avoid benefits expansions like those in California in the late 1990s
- * Consider a hybrid model that is part defined benefit and part defined contribution (401K).

- Get the facts. Identify which pension funds are really in trouble, and which are not. Move quickly to fix those that are.

- Use a portion of the assets that exist in our pension funds to invest in public infrastructure projects that will create jobs in the community. There is \$1.5 trillion currently in pension fund assets of all employers represented by SEIU. Investing 5% of that money in public infrastructure bonds and loans could create a lot of jobs and build a lot of community goodwill, and produce a good investment return.

- participate in ongoing legal actions against banks and investment firms that sold suspect mortgage-backed securities that collapsed during the economic crisis. Change investing rules for pension funds to keep them from making these types of mortgage security investments in the future.

2) Rapid Response Team on Pension Attacks

- Public Sector Union are now doing joint lobbying around pension issues at the Federal Level

- there is a coordinated attack on pensions. Currently a bill in the House of Representatives called PEPTA (Public Employee Pension Transparency Act) that would require state and local pension funds to assume that their rate of return on investments will be much lower, which in turn makes each pension fund appear to be in worse shape than it is.

- For responses at the State level, many unions have contributed money to fund a response including SEIU, AFSCME, Teamsters, UAW, CWA, AFT, UFCW, Building Trades

- The idea is to develop editorials, reports, news stories, organized actions, etc. to change the debate.

- Recommendations (based on polling) for how to talk about the retirement security issue include:

- *RAISE THE BAR: Instead of taking retirement security away from public employees, we should be working to make sure more people have secure retirements
- * POPULIST: We need to fix the real problem Wall Street caused, instead of taking away from teachers and first responders. Cutting pensions will not solve the budget crisis.
- * POLITICS: Public employees pay a significant part of pension costs and pay them on time. Politicians not paying their required contributions put these funds in the hole. Don't punish teachers and firefighters for politicians failures.
- * THIS IS A DISTRACTION: Politicians should focus on the real problem facing our state - creating jobs and getting people back to work.

- Messages that don't seem to work with the public:

- * Just defending the status quo
- * "We traded wages for pensions. We cannot tolerate these takeaways"
- * Explaining the details of how our pensions work, or attacking the failings of 401Ks.

3) Retirement Security For All

- 50% of SEIU represented workers now don't have a secure pension guaranteed
- workers being hired now have little confidence that social security or any other retirement plan will be there for them.
- private sector workers have seen their pensions erode or disappear in the past 30 years
- if we are perceived as just defending our own benefits, Unions will be further marginalized.
- so, we as a union need to be part of a movement pushing for a universal retirement system that all workers can be a part of
- the system should be portable from job to job
- think of the fight for retirement security for all in the same terms as the fight for health care for all
- this merges with a fight to protect social security (which is hugely popular), and merges with the fight for a fair economy
- this is a way to reach out to younger workers and new hires
- I have attached the basic principles of such a plan, from the RetirementUSA website

The Local 521 Retirement Action committee plans to reconvene the week of March 14 (date and time to be determined).

RETIREMENT USA

Working for a *Universal, Secure, and Adequate* Retirement System

Principles for a New Retirement System

Universal Coverage. *Every worker should be covered by a retirement plan.* A new retirement system that supplements Social Security should include all workers unless they are in plans that provide equally secure and adequate benefits.

Secure Retirement. *Retirement shouldn't be a gamble.* Workers should be able to count on a steady lifetime stream of retirement income to supplement Social Security.

Adequate Income. *Everyone should be able to have an adequate retirement income after a lifetime of work.* The average worker should have sufficient income, together with Social Security, to maintain a reasonable standard of living in retirement.

Shared Responsibility. Retirement should be the shared responsibility of employers, employees and the government.

Required Contributions. Employers and employees should be required to contribute a specified percentage of pay, and the government should subsidize the contributions of lower-income workers.

Pooled Assets. Contributions to the system should be pooled and professionally managed to minimize costs and financial risks.

Payouts Only at Retirement. No withdrawals or loans should be permitted before retirement, except for permanent disability.

Lifetime Payouts. Benefits should be paid out over the lifetime of retirees and any surviving spouses, domestic partners, and former spouses.

Portable Benefits. Benefits should be portable when workers change jobs.

Voluntary Savings. Additional voluntary contributions should be permitted, with reasonable limits for tax-favored contributions.

Efficient and Transparent Administration. The system should be administered by a governmental agency or by private, non-profit institutions that are efficient, transparent, and governed by boards of trustees that include employer, employee, and retiree representatives.

Effective Oversight. Oversight of the new system should be by a single government regulator dedicated solely to promoting retirement security.

SEIU Local 521 Executive Board Motion

Motion Number: 10

Date: March 19, 2011

Motion Title: Lodging for Kern County Representatives to the State Democratic Convention - \$250

Recommended By: Carmen Morales – SEIU Local 521 1st Vice President

Background: Kern County is a very conservative Community with elected officials not supportive of collective bargaining for public employees. Two Kern County activists, Regina Kane and Imelda Ceja-Butceiwicz, were voted in January to attend the State Democratic Convention from the Kern County Congressional District. These activists have paid dues to qualify to attend, paid their registration fees for the convention, and will pay for their travel. It is hoped that attendance at this Convention will equip these two activists to more effectively assist in electing political officials more friendly to labor in the Kern County area.

Motion: To spend \$250 plus appropriate taxes for two night's double occupancy lodging for Regina Kane and Imelda Ceja-Butceiwicz to attend the State democratic convention April 29 – May 1, 2011, from the general fund line item for member attended conferences (line 152).

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 Executive Board Motion

Motion Number: 11

Date: March 19, 2011

Motion Title: Authorization to Partner with ACCE on a State Wide Program Involving Foreclosure Reform

Recommended By: Riko Mendez, SEIU Local 521 Political Director

Background: Several months ago this Board voted to purchase foreclosure listings and pursue working with ACCE on foreclosure reform. We are now seeking to become more involved with ACCE and work in actual partnership with them on moving a program state wide.

The attached document, "Home Wreckers", outlines the need for foreclosure reform and the solutions we are trying to employ. The Political Director would also like to approach the leadership in the League of Cities and CSAC to get their official support of the plan.

The Political Director is asking for approval of the SEIU Local 521 Executive Board to have the Local listed as a partner and provide our logo on the attached report, "Home Wreckers".

Motion: To authorize SEIU Political Director, Riko Mendez, to pursue partnership with ACCE on behalf of SEIU Local 521 and provide the Local's name and logo on the document "Home Wreckers". Also to authorize the Political Director to approach the leadership of the League of Cities and CSAC to get their official support of the foreclosure reform plan.

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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Home Wreckers

How Wall Street Foreclosures Are Devastating Communities

As the foreclosure crisis continues, the costs to homeowners, the property tax base, and local governments add up to \$650 billion.

Wall Street banks shattered our economy and left our communities to clean up the pieces. The housing market is where the economic crisis began and without immediate action, we are facing a multi-billion dollar hit to homeowners and communities across California that would undermine the economic recovery our state desperately needs. Without a remedy, the damage to our communities will be staggering and long-lasting.

The Costs of the Foreclosure Crisis in California (2008-2012):

- 1. Homeowner Cost:** Home value losses to foreclosed homes and neighboring homes total **\$632 billion—\$337,379 value loss per foreclosure** to the surrounding community.
 - Decline in value of foreclosed homes - \$207 billion value loss
 - Decline in value of neighboring homes - \$424 billion value loss
- 2. Property Tax Cost:** As housing values decline, property tax revenue losses are estimated to be **\$3.8 billion-- \$2,058 property tax loss for every foreclosure.**
- 3. Local Government Cost:** Foreclosure-related costs for multiple agencies and multiple levels of government for maintenance of blighted properties, sheriff evictions, inspections, public safety, trash removal, and other costs are estimated to be **\$17.4 billion—\$19,229 cost for every foreclosure.**

The Foreclosure Crisis Continues:

- One in five U.S. foreclosures is in California.ⁱ
- California is the hardest hit of all states with the highest number of foreclosures- 700,000 homes in some stage of foreclosure.ⁱⁱ
- There have been 1.2 million foreclosures since 2008 in California and that number is expected to climb to 2 million through 2012.ⁱⁱⁱ
- Foreclosures in 2011 are expected to exceed 2010 levels.^{iv}
- More than a third of California homeowners with a mortgage already owe more on their mortgages than their homes are worth.^v

SIDEBAR – Who Is Responsible For This Mess?

Wall Street's reckless and predatory lending practices have devastated California. Bankers pushed homeowners into high-cost loans they couldn't afford and kept inflating the housing bubble so they could get their mega-bonus checks. When Wall Street's bets went sour, the bankers were bailed out by taxpayers and got to keep their bonuses but Californians lost billions in savings in their homes.

Top Banks Foreclosing on Californians:^{vi}

- Bank of America

- JP Morgan Chase
- Wells Fargo Bank
- Citigroup

California Homeowners Losses: \$632 billion

Photo - “Families in my community have lost either their homes or their life savings that were invested in their homes.”- Peggy Mears, Homeowner in Fontana, San Bernardino County

The foreclosures crisis will have a significant impact on California homeowners and their communities with an estimated \$632 billion in home value losses to foreclosed homes and neighboring homes.

Decline in Value of Foreclosed Homes: \$207 billion. It is estimated that homes in foreclosure experience a 22% decline in value.^{vii} That means that the impact of the 2 million foreclosures estimated for the period 2008 through 2012 will be over \$207 billion in lost home value in communities across California.¹

SIDEBAR – Insult to Injury: Bank Fees Forced on Families in Foreclosure

Mortgage servicers, who are often the Big Banks like Bank of America, JP Morgan Chase, Wells Fargo, make profits from foreclosure fees from families in foreclosure. One estimate showed that an average foreclosure results in \$7,200 in charges to the borrower.^{viii} Fees to struggling homeowners include foreclosure processing fees, late payment fees, inspections and valuations fees, and other charges.^{ix}

Decline in Value to Neighboring Homes: \$424 billion. The impact to foreclosed properties is just the tip of the iceberg. It is conservatively estimated that each foreclosed property will depress the value of neighboring homes within an eighth of a mile to drop 0.9%.^x Statewide, California homeowners could experience property devaluation of \$424 billion.²

¹ Direct impact to foreclosed homes was calculated using methodology from the U.S. Joint Economic Committee using median county home value from U.S Census, decline estimate of 22%, and number of foreclosures from RealtyTrac. The 22% decline estimate is based on the most conservative decline ranging from 22% to 28% based on *The Value of Foreclosed Property*, Anthony Pennington-Cross, Marquette University and RealtyTrac 2010 sales report.

² Neighboring home value decline was calculated using methodology from the U.S. Joint Economic Committee using median county home value from U.S. Census, decline in value of 0.9%, and number of foreclosures from RealtyTrac. The decline estimate is based on a conservative decline estimate of 0.9% to one-eighth mile radius (approximately 50 homes) based on *The External Costs of Foreclosure: The Impact of Single-Family Mortgage Foreclosures on Property Values*. Dan Immergluck, Georgia Institute of Technology and Geoff Smith, Woodstock Institute. Higher estimates are a 1.4% decline in low to moderate income communities and others double the impact radius to a quarter of a mile. Furthermore, the conservative estimate of 0.9% value decline doesn't account for the common scenario of communities with multiple foreclosures on one block that would further depress property values.

What will happen to the US economy in 2011? It's great news for executives and Wall Street traders, whose pay is linked to stock prices... But a bad omen for home prices and sales, and everyone whose savings are mainly in their homes. -Robert Reich, Fmr. Secretary of Labor^{xi}

SIDEBAR – What's Negative Equity? Often referred to as “underwater” or “upside down,” it means that borrowers owe more on their mortgages than their homes are worth. California’s negative equity share is 31.8% (compared to 23% nationally)- that means almost a third of homeowners are underwater on their mortgages. *“Negative equity holds millions of borrowers captive in their homes, unable to move or sell their properties.”* Mark Fleming, chief economist, CoreLogic.^{xii}

Property Taxes Tumble with Property Values: \$3.8 billion

Photo - “The foreclosure crisis in California has amounted to large losses for homeowners as well as draining local and state revenues depleting our schools, police and fire stations, and county hospitals.” - Phil Ting, San Francisco Assessor-Recorder

As property values drop an estimated \$632 billion, California communities could lose as much as \$3.8 billion in property tax revenue³ California’s County Assessors started to report record losses in 2009 and 2010- for many counties, the first time losses have been reported since the Great Depression. With the continued foreclosure crisis and property value declines coupled with the lag in the new lower property assessments, the property tax losses being reported are just the beginning.

California communities have been struggling with a dysfunctional fiscal system that has limited property tax revenue and over-relies on residential taxes. The foreclosure disaster has exacerbated this revenue crisis. California’s communities depend on property tax as a primary source of revenue for vital services provided through their counties, cities, school districts and community colleges, and special districts.^{xiii}

Property Tax Revenue Allocation:

- Counties: 17%
- Cities: 11%
- School districts and community colleges: 53%
- Special districts: 19%

Furthermore, Proposition 8 which allows an unlimited reduction in down-assessments to market values could further drive down tax revenue, and because Proposition 13 caps annual property value increases at 2 percent, there will only be incremental revenue growth following any recovery.

³ Property tax losses were estimated using lost home values (foreclosed and impacted homes as described in prior section) and effective tax rate of 0.61% from the U.S. Census and Tax Foundation.

The impact is already being felt with huge losses in property tax revenue: According to California county tax assessors, in only 12 of 65 California counties for 2009-2010, the tax roll was down about \$62.7 billion as a result of the foreclosure-fueled market decline, translating to an estimated \$627 million loss in property taxes just for the 2009-2010 fiscal year.^{xiv}

- Los Angeles County: \$190 million lost in property tax revenue^{xv}
- Riverside County: \$90 million lost in property tax revenue^{xvi}
- San Bernardino County: \$70 million lost in property tax revenue^{xvii}
- Santa Clara County: \$70 million lost in property tax revenue^{xviii}
- Contra Costa County: \$45 million lost in property tax revenue^{xix}

Cost to Local Governments: \$17.4 billion

“Abandoned properties are draining the City’s dollars at a time when we can least afford it. A single foreclosure can cost up to \$34,000 for local government agencies in the form of costs such as inspections, court actions, unpaid water and sewage charges, trash removal and LAPD intervention.” – Richard Alarcon, Los Angeles City Councilmember^{xx}

When banks foreclose on homes, they lower property value and property tax revenue but they also drain public resources at the local level. In fact, a single foreclosure can cost nearly \$20,000.^{xxi} Local government foreclosure-related costs are estimated at \$17.4 billion.⁴

Local government agencies have to spend time and money to absorb the cost of increased public safety, the maintenance of blighted properties, inspections, trash removal, foreclosure processing, sheriff evictions, providing transitional assistance and shelters, and other safety net support to families. Responding to these needs is a gargantuan task that involves multiple agencies and multiple levels of local government. The costs to taxpayers add up very quickly to \$20,000 and potentially much higher.

The National League of Cities (NLC) conducted a survey that found that foreclosures and the declining housing market ranked prominently as causes for local budget crises. That means at a time when cities are contemplating slashing services, they are also being asked to pick up the tab for cleaning up the banks’ foreclosure mess.

SIDEBAR – Drain on Public Safety: Vacant foreclosures unattended by banks become a magnet for blight and illicit activity that destabilize neighborhoods. According to one study, when the foreclosure rate increases one percentage point, neighborhood violent crime rises 2.33

⁴ Methodology based on *The Municipal Cost of Foreclosures: A Chicago Case Study*. Many experts, including the U.S. Joint Economic Committee, use the \$19,229 cost from the Chicago study as an approximate cost of foreclosure. Also, the Chicago study from 2005 likely does not capture the full post-crisis level of impacts and level of costs in California. We used a conservative method of only calculating those cost for REO’s (bank-owned properties)-- however, when any home goes into foreclosure we have to be prepared for worst case scenario, which is that it will end up an REO.

percent.^{xxii} *“In the Franklin Reserve neighborhood of Elk Grove, Calif., full of subdivisions with half-million-dollar homes, homeowners are fighting inner-city problems like gangs, drugs, theft, and graffiti.”* – AP Story^{xxiii}

Recommendation - It’s Time for Solutions to Help California Recover:

We can't have an economic recovery in our state without addressing the costs of the foreclosure crisis. The Homeowner Protection Package is a comprehensive policy solution to remedy the costs of foreclosure, provide homeowner protections, and help stabilize the California housing market:

- **Foreclosure Fee to Recoup Losses – AB 935 (Blumenfield):** This bill would impose a fee of \$20,000 on a foreclosing party in order to mitigate the economic impact of foreclosures on cities, counties, schools districts and the state.
- **Fair and Legal Modification – SB 729 (Leno/Steinberg):** This bill would require loan servicers to give homeowners a yes or no decision on their loan modification application before beginning the foreclosure process. It also allows homeowners to bring legal action with specified remedies when serious violations occur.
- **Title Transparency – AB 1321 (Wieckowski):** This bill would mandate recording of all mortgage deeds/trusts and assignments, and payment of the requisite fees. It would also require that the mortgage note be filed prior to issuing a Notice of Default to ensure that the foreclosing party has the right to foreclose.

The Cost of the Foreclosure Crisis in California (2008-2012)

County	Total Foreclosures	Home Value Loss	Property Taxes Loss	Cost to Local Government
California	1,874,219	\$632,321,429,854	\$3,857,160,722	\$17,431,934,576
Los Angeles	381,461	\$150,561,591,256	\$918,425,707	\$2,849,872,403
San Diego	144,134	\$53,741,082,570	\$327,820,604	\$1,249,654,252
Orange	107,805	\$48,437,181,831	\$295,466,809	\$742,600,905
Riverside	207,098	\$56,376,479,102	\$343,896,523	\$2,036,097,277
San Bernardino	167,114	\$43,330,885,344	\$264,318,401	\$1,663,527,711
Santa Clara	51,867	\$26,344,446,538	\$160,701,124	\$411,039,104
Alameda	63,351	\$27,665,936,488	\$168,762,213	\$581,919,535
Sacramento	110,150	\$27,350,514,960	\$166,838,141	\$1,221,979,875
Contra Costa	70,775	\$29,504,173,975	\$179,975,461	\$736,301,485
San Francisco	10,606	\$5,902,970,814	\$36,008,122	\$74,489,300
Fresno	46,204	\$9,172,503,988	\$55,952,274	\$495,465,951
Ventura	33,430	\$14,363,815,596	\$87,619,275	\$278,043,648
Kern	58,233	\$10,019,337,048	\$61,117,956	\$658,285,586
San Mateo	15,723	\$8,881,561,071	\$54,177,523	\$116,766,180
San Joaquin	62,821	\$16,815,090,031	\$102,572,049	\$710,242,344
Sonoma	20,495	\$8,429,777,672	\$51,421,644	\$208,650,033
Stanislaus	48,161	\$11,568,031,395	\$70,564,992	\$551,583,865
Solano	33,288	\$10,694,397,826	\$65,235,827	\$355,251,929
Santa Barbara	13,470	\$5,792,352,822	\$35,333,352	\$123,884,755
Placer	24,191	\$7,839,730,273	\$47,822,355	\$214,299,513
Monterey	20,380	\$8,994,285,020	\$54,865,139	\$209,588,408
Tulare	19,609	\$3,088,782,356	\$18,841,572	\$207,088,638
San Luis Obispo	8,917	\$3,458,496,798	\$21,096,830	\$87,203,515
Santa Cruz	8,441	\$4,280,161,107	\$26,108,983	\$74,289,319
Marin	5,647	\$3,475,892,263	\$21,202,943	\$46,072,684
Butte	8,080	\$1,559,619,555	\$9,513,679	\$87,149,674
Merced	24,651	\$5,346,370,981	\$32,612,863	\$281,866,374
El Dorado	10,821	\$3,672,092,584	\$22,399,765	\$106,555,581
Shasta	7,919	\$1,355,682,489	\$8,269,663	\$92,972,215
Yolo	7,885	\$2,346,277,114	\$14,312,290	\$78,823,517
Humboldt	1,944	\$418,053,066	\$2,550,124	\$16,625,393
Imperial	9,366	\$1,549,946,242	\$9,454,672	\$96,825,707
Nevada	5,053	\$1,617,935,229	\$9,869,405	\$47,461,018
Napa	5,637	\$2,430,072,902	\$14,823,445	\$54,821,879
Madera	10,768	\$2,396,676,832	\$14,619,729	\$118,489,098
Kings	5,071	\$817,859,607	\$4,988,944	\$53,183,568
Mendocino	2,342	\$735,926,660	\$4,489,153	\$24,143,932
Lake	5,552	\$1,122,688,153	\$6,848,398	\$63,959,500
Sutter	5,347	\$1,048,634,045	\$6,396,668	\$59,706,045
Tuolumne	2,474	\$882,258,506	\$5,381,777	\$28,720,434
Yuba	6,201	\$1,180,265,608	\$7,199,620	\$74,635,441
Calaveras	3,892	\$1,388,189,428	\$8,467,956	\$45,153,538

Siskiyou	1,393	\$496,872,241	\$3,030,921	\$15,025,541
Tehama	2,660	\$948,665,060	\$5,786,857	\$30,385,666
Amador	2,132	\$760,287,284	\$4,637,752	\$23,993,946
San Benito	3,583	\$1,277,916,031	\$7,795,288	\$38,419,542
Plumas	1,235	\$440,308,979	\$2,685,885	\$14,629,423
Mono	1,137	\$405,500,817	\$2,473,555	\$9,287,607
Lassen	1,489	\$531,109,777	\$3,239,770	\$16,856,141
Del Norte	539	\$192,300,827	\$1,173,035	\$6,199,430
Glenn	990	\$352,931,934	\$2,152,885	\$10,506,726
Mariposa	658	\$234,741,106	\$1,431,921	\$7,683,908
Inyo	264	\$94,081,896	\$573,900	\$2,376,704
Colusa	1,251	\$446,157,891	\$2,721,563	\$15,337,050
Trinity	160	\$57,205,216	\$348,952	\$1,919,054
Modoc	104	\$36,948,008	\$225,383	\$1,415,254
Sierra	145	\$51,641,617	\$315,014	\$1,480,633
Alpine	103	\$36,734,023	\$224,078	\$1,126,819

** Foreclosure numbers from RealtyTrac*

Endnotes

ⁱ Based on data from RealtyTrac.com.

ⁱⁱ Based on data from RealtyTrac.com 2010 year end foreclosure filings and Center for Responsible Lending.

ⁱⁱⁱ RealtyTrac data for 2008 to 2009, and 2010 data and projected foreclosures for 2011 and 2012 based on Moody's Analytics, <http://online.wsj.com/article/SB10001424052748704692904576166982594828812.html#printMode>. Center for Responsible Lending estimates a similar number in their California Fact Sheet, <http://www.responsiblelending.org/mortgage-lending/tools-resources/factsheets/california.html>.

^{iv} Moody's Analytics foreclosure projections,

<http://online.wsj.com/article/SB10001424052748704692904576166982594828812.html#printMode>

^v http://www.corelogic.com/uploadedFiles/Pages/About_Us/ResearchTrends/CL_Q4_2010_Negative_Equity_FINA_L.pdf

^{vi} Foreclosure Radar

^{vii} The Value of Foreclosed Property, Anthony Pennington-Cross, *Marquette University*.

^{viii} http://www.fhfund.org/_dnld/reports/MFP_1995.pdf

^{ix} <http://www.washingtontimes.com/news/2010/dec/17/big-banks-profiting-fromforeclosure-crisis/>

^x The External Costs of Foreclosure: The Impact of Single-Family Mortgage Foreclosures on Property Values. Dan Immergluck, Georgia Institute of Technology and Geoff Smith, Woodstock Institute.

^{xi} http://www.huffingtonpost.com/robert-reich/new-years-prediction_b_802637.html

^{xii} http://www.corelogic.com/uploadedFiles/Pages/About_Us/ResearchTrends/CL_Q4_2010_Negative_Equity_FINA_L.pdf

^{xiii} CA Board of Equalization, CA Property Tax Overview. <http://www.boe.ca.gov/proptaxes/pdf/pub29.pdf>

^{xiv} http://www.bondbuyer.com/issues/119_389/calif_counties_property_values_decline-1015128-1.html

^{xv} LA Tax Assessor Report. <http://assessor.lacounty.gov/extranet/News/rollrls2010.pdf> The property tax roll was reduced by \$19 billion. Calculation is \$19 billion x 1%, the property tax rate in California.

^{xvi} <http://riverside.asrckrec.com/acr/docs/2010-2011%20Annual%20Report.pdf>

^{xvii} <http://www.sbcounty.gov/assessor/Archives/20100630AssessorAnnualRollRecap.pdf>

^{xviii} <http://www.sccgov.org/SCC/docs%2FAssessor%2C%20Office%20of%20the%20%28ELO%29%2Fattachments%2FAnnual%20Report%202010-11.pdf>

^{xix} <http://www.sccgov.org/SCC/docs%2FAssessor%2C%20Office%20of%20the%20%28ELO%29%2Fattachments%2FAnnual%20Report%202010-11.pdf>

^{xx} Statement by Councilman Alarcon, April 29, 2010

^{xxi} Cost per foreclosure of \$19,229 based on U.S. Joint Economic Committee report using estimates *The Municipal Cost of Foreclosures: A Chicago Case Study*.

^{xxii} <http://www.nw.org/network/neighborworksporgs/foreclosuresolutions/reports/documents/7ForeclosureImpacts.pdf>

^f

^{xxiii} http://www.msnbc.msn.com/id/21773482/ns/business-real_estate/

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MRC/MAC- REPORT

March 16, 2011

All of the IHSS Santa Clara and San Mateo County Homecare data information has been exported from the MAC in Pasadena and has been integrated into our own UnionWare database.

The IHSS Homecare calls were brought back in-house as of March 1, 2011. We have set up hotlines for these homecare workers in English, Spanish, Vietnamese and Chinese.

The IHSS homecare workers calling in are being directed to the hotline in their own language. The IHSS homecare leaders/stewards are accessing the hotline messages three times a week and forwarding the messages to the right union staff person for follow up.

Homecare workers from the private sector who have worksites will be referred to their steward for immediate assistance.

All of the Homecare workers from both the private and public sector with worksite issues, grievances and final disciplines are being referred to the Contract Enforcement Department CESA's for assistance. This process has not changed.

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SEIU Local 521 Executive Board Motion

Motion Number: 03

Date: March 19, 2011

Motion Title: City of Scotts Valley Sales Tax Continuance Initiative – Issues PAC

Recommended By: Santa Cruz County COPE Committee – per results of phone/email poll

Background: SEIU 521 represents the City of Scotts Valley employees. Scotts Valley Councilwoman Stephanie Aguilar approached SEIU 521 for support in getting signatures to qualify a local Initiative allowing residents to vote on a half cent sales tax. Aguilar sent out a total of 4 mailings. If the motion passes SEIU 521 will have paid for postage of 1 of the 4 mailings sent out.

Ultimately, Aguilar did not gather enough signatures to qualify the initiative, but she did make a strong effort to do so and has contributed over \$2,500 dollars of her own money to the campaign.

Of the 11 members who attended the COPE Committee Meeting February 24, 2011, 6 voted via phone to recommend this motion, 1 voted no and the remaining did not respond.

Motion: Motion to contribute \$680 dollars from the SEIU 521 Issues account to help pay for postage on a mailing sent to residents to gain signatures to qualify a half cent sales tax in Scotts Valley.

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 Executive Board Motion

Motion Number: 04

Date: March 19, 2011

Motion Title: Tulare County Rose Ann Vuich Award Dinner

Recommended By: Tulare County Chapter

Background: The Democratic Party in Tulare County has been a very close ally in campaigns that we have run in the county. They have turned out to various functions including the "Walk on Chase Bank" as well as many other SEIU 521 community actions. This year they are holding an awards dinner to honor local democrats many of whom helped elect Jerry Brown. Keynote speaker at the event will be the Honorable Assemblyman Henry T. Perea, a staunch SEIU 521 Local ally. We are requesting the purchase of a VIP table of 8 and sending activists to the 2011 Rose Ann Vuich Award Dinner. The purchase of a VIP table of 8 will allow us to put up our union banner and to have a full page ad in the program. An invitation to attend the event will be extended to Fresno members who are activists as well as Tulare activist members.

Motion: To contribute \$1,000 from the SEIU Local 521 Candidate PAC to purchase a VIP table for 8 at the 2011 Roseanne Vuich Award Dinner event.

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 Executive Board Motion

Motion Number: 05

Date: March 19, 2011

Motion Title: Monterey Bay Central Labor Council Annual Awards Dinner Fundraiser - \$1875

Recommended By: Matt Nathanson, Regional Vice President Region 2; and Jim Heaney, Santa Cruz County COPE Chair, and an email poll of the Santa Cruz County COPE Committee and the Monterey County COPE Committee.

Background: The Monterey Bay Central Labor Council (MBCLC) representing both Santa Cruz County and Monterey County has an annual awards dinner each year. This year the dinner, A Celebration of Solidarity, will be held on Friday, April 29, 2011, at Hyatt Regency Hotel & Spa. The COPE Committees involved have attended this event for many years. Last year the Local purchased tickets for \$2,000 allowing COPE activists and elected guests from Santa Cruz and Monterey to attend.

The Matt Nathanson, Regional Vice President and Jim Heaney, Santa Cruz County COPE Committee Chair on behalf of the Santa Cruz County COPE Committee request seats at 1½ tables this year for activists and elected guests from both Monterey and Santa Cruz areas.

Email Poll: 30 of 41 members who had attended the last COPE meeting in each area voted yes.

Motion: To approve an expenditure of \$1,875 from the SEIU Local Candidate PAC for the MBCLC Annual Awards Dinner on Friday, April 29, 2011 at the Hyatt Regency Hotel & Spa.

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 Executive Board Motion

Motion Number: 12

Date: March 19, 2011

Motion Title: George Shirakawa, East San Jose County Supervisor – COPE Contribution of up to \$1,500 – to Pay Off Past Campaign Debt

Recommended By: Santa Clara and San Benito Counties COPE Committee

Background: George Shirakawa was elected two years ago to the Santa Clara County Board of Supervisors. He represents the Eastside of San Jose. During the last two years in these tough budget times, Supervisor Shirakawa has made himself personally available and has met with our members and carried some restorations of jobs on our behalf. This contribution would help pay off past campaign debt.

Motion: To contribute up to \$1,500 to the Campaign Committee for George Shirakawa from the SEIU Local 521 Candidate PAC to pay off past campaign debt.

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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Bank Balance on Saving and Investment accounts
as of Jan. 31st, 2011

DISCRETIONARY SAVINGS

ITEMS	GL#	ACCOUNT NAME	Bank	ENDING BALANCE as of 12/31/2010	+/- reason	ENDING BALANCE as of 1/31/2011
1	1005	CONTINGENCY FUND	Bank of The West	50,088.75		50,088.75
2	1006	STRIKE FUND	Bank of The West	814,976.72		814,976.72
3	1006	STRIKE FUND	Bank of The West - T- Bill Mature. 2/201	300,000.00		300,000.00
4	1006	STRIKE FUND	Bank of The West - T- Bill Mature. 2/2011	461,764.74		461,764.74
5	NA	STRIKE FUND per L521	@ INTERNATIONAL	257,769.45		257,769.45
6	1009	LEGAL DEFENSE FUND	Bank of The West - T- Bill Mature. 2/2011	368,377.37	accrued \$0.12 per month & paid invoices	174,513.01
7	1010	GOOD & WELFARE FUND	Bank of The West - T- Bill Mature. 2/2011	77,579.92	one donation was made	77,138.92
8	1003	AGENCY FEE	Bank of The West	479,686.50	\$30,000 accrual monthly & paid back GF \$14K for 2010 refund	495,137.33
Total reserve				\$ 2,810,243.45		\$ 2,631,388.92

POLITICAL - PAC money

9		PAC - Candidates	US Bank - Olson	9,193.16	reconciled to Olson's 12/31/2010 report	7,473.97
10		PAC - Issues	US Bank - Olson	83,283.70	reconciled to Olson's 12/31/2010 report	1,737.06
11		PAC - Independent Expenditure	US Bank - Olson	2,214.14	reconciled to Olson's 12/31/2010 report	5,175.00
				\$ 94,691.00		\$ 14,386.03

MANDATORY SAVINGS

12	1002	ORGANIZING FUND	Bank of The West	1,770,338.42		1,770,338.42
13	1002	ORGANIZING FUND	Bank of The West - T- Bill Mature. 2/2011	450,000.00		450,000.00
14	1002	ORGANIZING FUND	Monterey County Employee Credit Union	200,115.07	CD with credit union	200,468.35
				\$ 2,420,453.49		\$ 2,420,806.77

UNFUNDED RESERVES (located in General Fund)

15	2150-10	RETIREE BENEFIT TRUST	Reserve	602,147.16	+\$1 / month	602,148.16
16	2150-11	CLARENCE DODGE SCHOLARSHIP	Reserve	9,631.04	+\$1250 / month	10,881.04
17	2150-12	CAPITAL RESERVE	Reserve	91,134.23	+\$1000/month	92,134.23
19	2150-14	BUILDING FUND	Reserve	172,661.53	+\$1 / month	172,662.53
				\$ 875,573.96		\$ 877,825.96

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	A	B	C	D	E	F	G	H
1			Year 2011		Jan			
2			2011 - 12		Budget	Actual	better/ (worse)	NOTE
			months					
3	Headcount	TOTAL DUES RECEIPTS	30,699,660		2,558,305	2,764,001	205,696	got the 3rd pay period dues from varies chapt
4	57,172	OTHER INCOME			-	-	-	
5		Interest & Dividends	5,000		417	752	335	
6		SMIHSS Administrative Reimbursement	50,000		4,167	-	(4,167)	
7		Sublease Rent	79,137		6,595	5,411	(1,184)	
8		Misc. Income - SEIU Int'l subsidy	28,980		2,415	2,442	27	
9	A	Misc. items spend from saving accounts			-	-	-	
10		Total Misc. Income	163,117		13,593	8,605	(4,988)	
11		TOTAL GENERAL FUND INCOME	30,862,777		2,571,898	2,772,606	200,708	
12		GENERAL FUND EXPENSES						
13		ORGANIZING OFFSET	4,029,990		335,833	335,833	(0)	
14		SALARIES						
15	5	Administrative	451,620		34,740	36,969	(2,229)	
16	6	Admin Support	377,080		29,006	26,716	2,290	
17	12	Directors	1,064,093		81,853	79,718	2,136	
18	67	Internal Organizers/Research,CED,CESA	4,499,160		346,089	308,770	37,320	
19	20	Clerical	1,026,841		78,988	79,420	(432)	
20	2	Facilities	93,512		7,193	5,050	2,143	
21	6	Data Base	335,939		25,841	25,534	307	
22	A	Special project - pay by other funding	-		-	-	-	
23		Temp. Internal Organizers/Research	3,000		250	-	250	
24		Temp. Clerical/Support	3,000		250	-	250	
25		Vacation & Comp Time	592,158		49,347	29,868	19,479	
26		Total Salaries	8,446,404		653,558	592,045	61,262	
27	118	PAYROLL RELATED EXPENSES						
28		Pension	1,098,754		84,520	77,017	7,503	
29		Payroll Taxes Expenses	784,825		60,371	79,030	(18,659)	pay the first \$7000 on unemployment tax
30		Travel Staff-Admin	50,714		4,226	8,831	(4,605)	more activities than we anticipated
31		Travel Staff- Internal Organizers	62,081		5,173	3,557	1,616	
32		Mileage/Ins. Reimb.-Admin & Director	7,793		649	2,427	(1,777)	more activities than we anticipated
33		Mileage/Ins. Reimb.-Internal Organizers	213,730		17,811	18,577	(766)	more activities than we anticipated
34		Telephone Reimbursement	86,827		7,236	6,485	750	
35	10	Retiree Health Exp	109,918		9,160	8,478	682	
36		Retire Benefit Trust Fund	12		1	1	-	
37		Benefits(Health, Dental, Vision,life,401K,Fla	3,305,491		275,458	215,535	59,923	
38		Workers Comp Insurance	172,898		14,408	12,214	2,194	
39		Recruiting exp	3,986		332	2,612	(2,280)	new hired, paid for moving expenses
40		Total Payroll Related Expenses	5,897,030		479,345	434,765	44,580	
41		Total Salaries & Payroll Expenses	14,343,434		1,132,903	1,026,810	105,843	
42		MISCELLANEOUS						
43		Agency Fee/Assoc. Exp.	360,000		30,000	30,000	-	
44		Capital Fund Expense	12,000		1,000	1,000	-	
45		Admin exp share w. chapter	6,074		506	573	(67)	
46		Free Life insurance to members (SCR, MRY	56,499		4,708	3,877	831	
47		Dodge Scholarship	15,000		1,250	1,250	-	
48		Computer Database UnionWare	104,400		8,700	6,848	1,852	
49	A	Accounting Software Gp	12,000		1,000	-	1,000	
50		MRC - IHSS - 4 months only	60,000		15,000	15,000	-	
51		Total Miscellaneous	625,973		62,164	58,548	3,617	
52								
53		ARBITRATIONS & LEGAL						
54		Arbitrations Fees & legal fees - representatio	166,971		13,914	9,417	4,497	
55	A	Arbitrations Fees & legal fees - admin.	63,063		5,255	-	5,255	
56		Retainer	261,600		21,800	21,800	-	
57	57,172	Automatic Legal Defense Fund (\$0.12 per m	82,328		6,861	6,861	(0)	
58		Total Arbitrations & Legal	573,961		47,830	38,078	9,752	
59								
60		FACILITIES						
61		Rent-SJC	473,750		39,479	38,569	910	
62		Rent-SQL	54,382		4,532	4,487	45	
63		Mortgage - Monterey & Parking	5,178		432	-	432	
64		Rent-Santa Cruz, Watsonville & Hollister	74,928		6,244	5,969	275	

	A	B	C	D	E	F	G	H
1			Year 2011			Jan		
2			2011 - 12				better/ (worse)	NOTE
			months		Budget	Actual		
65		Rent-Visalia	13,510		1,126	1,000	126	
66		Utilities	174,613		14,551	7,724	6,827	
67		Kitchen Sundries	29,296		2,441	1,468	973	
68		Gen. Liab. Ins. & Property Tax	178,677		14,890	14,758	131	
69		Building Maintenance/Security/Janitorial	173,017		14,418	17,846	(3,428)	more activities than we anticipated
70		Total Admin - Facilities	1,177,350		98,112	91,821	6,292	
71							-	
72		ADMINISTRATIVE - OFFICES					-	
73		Audit/Acct. Fees	158,119		13,177	1,123	12,054	
74		Staff NEG Consultant	5,552		463	-	463	
75		Subscriptions	54,376		4,531	-	4,531	
76		Office Sundries	94,427		7,869	4,550	3,319	
77		Office Equipment Leases	200,443		16,704	17,386	(682)	
78		Equipment Maintenance & Repair Contracts	74,717		6,226	14,211	(7,985)	Dec. expenses - more activities than we anticip
79		Contributions	5,565		464	465	(1)	
80		Research Material & Data	12,000		1,000	-	1,000	
81		Total Admin - Offices	605,198		50,433	37,735	12,698	
82							-	
83		COMMUNICATIONS					-	
84		Printing	47,094		3,925	3,060	865	
85		Paper	16,622		1,385	2,525	(1,140)	more activities than we anticipated
86		Website/Station/communication	3,951		329	3,409	(3,080)	ad on newspaper
87		Telephone & Internet	199,785		16,649	13,847	2,802	
88		Postage	67,537		5,628	4,227	1,401	
89		Professional Fees/Translations	9,363		780	-	780	
90		Total Communications	344,351		28,696	27,068	1,628	
91							-	
92		CONFERENCES/MILEAGE					-	
93		Staff-Misc. Conf/Seminar	4,141		345	-	345	
94		Exec. Board-Conferences	1,629		136	-	136	
95		Misc. Members-Reimbursed	1,800		150	-	150	
96		Total Conferences/Mileage	7,570		631	-	631	
97							-	
98		STAFF MEETING & TRAINING					-	
99		Staff / Director Training	29,441		2,453	1,704	749	
100		Staff - representation & political & communi	41,216		3,435	2,912	523	
101		Clerical Staff	2,351		196	-	196	
102		Executive Staff	1,200		100	-	100	
103		Tuition Reim.-Internal Organizers	1,000		83		83	
104		Tuition Reim.-OPEIU	1,000		83	342	(259)	
105		Total Staff Training	76,209		6,351	4,958	1,393	under budget, meet OPEIU guideline
106							-	
107		EDUCATION & TRAINING					-	
108		Steward & Chief Steward Training	4,206		351	546	(195)	
109		Executive Board	2,000		167		167	
110		Education & Training Committee Meeting &	202		17		17	
111		Industry Training Events	5,218		435	-	435	
112		Total Education & Training	11,626		969	546	423	
113							-	
114		POLITICAL/SOCIAL INVOLVEMENT					-	
115	40,764	Candidates, Issues, IE Account (\$0.12 per me	97,834		8,153	8,733	(581)	
116		Legal	113,105		9,425	1,004	8,422	
117		Committee Meetings	17,348		1,446	483	963	
118		Conferences	1,000		83	-	83	
119		Electoral Staff/ Activity	1,000		83		83	
120		Polls & Surveys	1,000		83		83	
121		Special Printing	196		16	-	16	
122		Subscriptions	500		42		42	
123		Total Political/Social Involvement	231,982		19,332	10,220	9,112	
124							-	
125		SOCIAL & ECONOMIC JUSTICE					-	
126		Committee Meetings	5,000		417	189	227	
127		Conferences	350		29	123	(94)	
128		Contributions/Solidarity	4,530		378	750	(373)	
129	57,172	Caucus Activities	80,670		6,723	5,461	1,262	

	A	B	C	D	E	F	G	H
1			Year 2011			Jan		
2			2011 - 12		Budget	Actual	better/ (worse)	NOTE
			months					
130		Total Social & Economic Justice	90,550		7,546	6,523	1,023	
131							-	
132		MEMBER INVOLVEMENT					-	
133		Memorabilia/Give away Member Pride	13,086		1,091	561	530	
134		Awards/Recognition	500		42	250	(208)	
135		Ex Board / Advisory Board Reimbursement	1,000		83	67	17	
136		Rally Rental & Bus	12,446		1,037	663	374	
137		Member Reimbursement/Lost time	9,567		797	200	597	
138		Transportation & Vehicle Expenses	5,919		493	295	198	
139		Total Member Involvement	42,518		3,543	2,036	1,507	
140							-	
141		NEGOTIATIONS					-	
142		Printing Contracts	5,000		417	(185)	602	
143		Meetings & Supplies	19,111		1,593	1,574	18	
144		Strike Preparations	10,000		833		833	
145	40,764	Automatic Strike Fund Transfer - reduction t	12		1	1	-	
146		Total Negotiations	34,123		2,844	1,390	1,453	
147		MEETINGS & EVENTS					-	
148		Executive Board Meetings	15,518		1,293	443	851	
149		Steward/Council meetings	6,196		516	-	516	
150	57172	521 Party & other events	-		-	-	-	
151		Delegate Vote & Convention 2011	71,465		-	-	-	
152		Industries & Members conference	1,543		129	-	129	
153		Miscellaneous	1,000		83		83	
154		Total Meetings & Events	95,721		2,021	443	1,579	
155							-	
156		REPRESENTATIVE DUES					-	
157	56,584	SEIU \$7.65 ea	5,194,411		432,868	426,526	6,342	
158	52,685	SEIU Unity Fund \$5.00ea	3,161,100		263,425	260,035	3,390	
159	588	SEIU Retirees \$1.00ea	7,056		588	960	(372)	
160	56,584	SEIU/ State Council-\$2.53ea	1,717,890		143,158	139,140	4,017	
161	900	Nurse Alliance \$1.45ea	15,660		1,305	1,353	(48)	
162	25,902	So Bay CLC Jul/10 2\$0.60, Jun/11 2\$0.63	191,934		15,994	18,849	(2,855)	
163	4,000	SMCO CLC \$0.60ea	28,800		2,400	2,123	277	
164	8,524	Fresno CLC \$0.45ea	46,030		3,836	2,788	1,048	
165	7,482	Bakersfield CLC \$0.25ea	22,446		1,871	1,444	427	
166	6,157	Monterey & Santa Cruz LC \$0.55ea	40,636		3,386	3,361	26	
167	110	North Valley CLC	1,320		110	110	-	
168	56,584	CA Labor Fed 25% X .70ea	118,826		9,902	4,914	4,988	
169		Building Trades-SMCO	3,600		300	300	-	
170		Total Representative Dues	10,549,709		879,142	861,903	17,240	
171							-	
172		TOTAL EXPENSES	32,840,266		2,678,350	2,503,910	174,440	
173							-	
174		TOTAL INCOME LESS TOTAL EXPEN	(1,977,489)		(106,452)	268,696	375,147	
175							-	
176		VOLUNTARY TRANSFERS					-	
177		Building Funds	12		1	1	-	
178		Strike Fund	-		-	-	-	
179		Total Transfers	12		1	1	-	
180		TOTAL INCOME LESS EXPENSES & T	(1,977,501)		(106,453)	268,695	375,147	

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SEIU Local 521
Organizing Statement for the year of 2011

Doc # 3

	A	B	C	D	E
1		Year 2011	Jan-11		
2		12 months	Budget	Acutal	Better / Worst
3					
4	Budget from SEIU Local 521	4,029,990	335,833	335,833	1
5					
6	Expenses				
7	Legal - Organizi	28,200	2,350	2,350	-
8	Arbitration - Organizing	-	-	-	-
9	Lost Time - Organizing	600,000	50,000	139,063	(89,063)
10	Salaries - Organizing (25+2)	1,142,045	87,850	102,470	(14,620)
11	Workers Comp. Ins. - Org	20,386	1,699	1,922	(223)
12	Payroll Tax Exp - Organ.	102,784	8,565	6,303	2,262
13	401K Matchering	34,261	2,855	2,123	732
14	EMPLOYEE BENEFITS - Organizing	433,163	36,097	39,088	(2,991)
15	Pension Plan Exp - Organi.	159,886	13,324	13,621	(297)
16	Staff Recruiting Exp-Org.	100	8	-	8
17	Vacation / Comp Time - Org	131,774	10,981	1,212	9,769
18	Training Exp - Org.	8,000	667	1,064	(398)
19	Mileage reimb exp - Organizing	147,600	12,300	14,666	(2,366)
20	Vehicle Expenses	11,000	917	-	917
21	RENT EXPENSES - Organizing	55,200	4,600	6,647	(2,047)
22	Telephone Expenses - Organizin	22,800	1,900	1,203	697
23	Utilities Expenses	4,200	350	60	290
24	Office Supplies & Other Allocation - Or	12,000	1,000	400	600
25	Printing Expenses - Organizing	200	17	-	17
26	Postage Expenses - Organizing	600	50	30	20
27	PT Organizing		-	-	-
28	Communication Cost Expenses	3,600	300	-	300
29	Referral lead/DATA - Organizing	940	78	-	78
30	Professional Fee Expenses		-	-	-
31	Translation Expenses - Organ		-	-	-
32	Equipment Leasing Exp - Organi	3,600	300	428	(128)
33	Equip. Maint. & Repair -Organi	1,200	100	80	20
34	Building Maint. & Repair -Organi	1,800	150	718	(568)
35	Computer Database Services	9,400	783	-	783
36	Subscriptions - Organizing		-	-	-
37	Travel Expenses - ORGANIZING	230,000	19,167	13,480	5,686
38	Conference - Organizing		-	-	-
39	Rally / Bus Rental-Organizing	-	-	-	-
40	Memorabilia / Give Away-Org	-	-	-	-
41	Meeting - Organizing	3,600	300	768	(468)
42	Donation - Organizing	1,500	125	1,234	(1,109)
43	SEIU Int'l share cost	300,000	25,000		
44					
45	Total Expenses	3,469,840	281,833	348,931	(67,099)
46					
47	Net Income	560,150	54,000	(13,098)	67,099

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1					COUNTIES													
2	County	Office	B	C	D	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	AVERAGE
3	FAT	FAT	26M		FRESNO COUNTY	2,515												2,515
4	FAT	FAT	26A		FRESNO COUNTY - AGENCY	1,306												1,306
5	KER	BFL	26M		KERN COUNTY	3,318												3,318
6	KER	BFL	26A		KERN COUNTY - AGENCY	1,521												1,521
7	KIN	HAN	26M		KINGS COUNTY	375												375
8	MAD	FAT	26M		MADERA COUNTY COMPA	62												62
9	MAD	FAT	26M		MADERA COUNTY SEMC	22												22
10	MAR	FAT	26M		MARIPOSA COUNTY	232												232
11	MRY	SNS	26M		MONTEREY COUNTY	2,215												2,215
12	MRY	SNS	26A		MONTEREY COUNTY - AGENCY	398												398
13	SB	SNS	26M		SAN BENITO COUNTY	149												149
14	SB	SNS	26A		SAN BENITO COUNTY - AGENCY	157												157
15	SMC	SQL	26M		SAN MATEO COUNTY	810												810
16	SMC	SQL	26A		SAN MATEO COUNTY - AGENCY	664												664
17	SC	SJC	26M		SANTA CLARA COUNTY	7,897												7,897
18	SC	SJC	26A		SANTA CLARA COUNTY - AGENCY	991												991
19	SCR	SCR	26M		SANTA CRUZ COUNTY	1,495												1,495
20	SCR	SCR	26A		SANTA CRUZ COUNTY - AGENCY	59												59
21	STA	FAT	26M		STANISLAUS COUNTY	414												414
22	STA	FAT	26A		STANISLAUS COUNTY - AGENCY	79												79
23	TUL	VIS	26M		TULARE COUNTY	819												819
24	TUL	VIS	26A		TULARE COUNTY - AGENCY	595												595
25	TUO	FAT	26M		TUOLUMNE COUNTY	21												21
26					CITIES													
27	KER	BFL	26M		CITY OF ARVIN	29												29
28	KER	BFL	26M		CITY OF BAKERSFIELD	710												710
29	FAT	HAN	26M		CITY OF COALINGA	28												28
30	FAT	BFL	26A		CITY OF COALINGA - AGENCY	6												6
31	KIN	HAN	26M		CITY OF CORCORAN	-												-
32	KER	BFL	26M		CITY OF DELANO	202												202
33	SMC	SQL	26M		CITY OF EAST PALO ALTO	28												28
34	SMC	SQL	26M		CITY OF EAST PALO ALTO - AGENCY	12												12
35	TUL	HAN	26M		CITY OF EXETER	16												16
36	MRY	SNS	26M		CITY OF GREENFIELD	15												15
37	KIN	HAN	26M		CITY OF HANFORD	112												112
38	KIN	HAN	26A		CITY OF HANFORD - AGENCY	15												15
39	SB	SNS	26M		CITY OF HOLLISTER	32												32
40	SB	SNS	26A		CITY OF HOLLISTER - AGENCY	7												7
41	KIN	SNS	26M		CITY OF KINGS	6												6
42	KIN	SNS	26A		CITY OF KINGS - AGENCY	9												9
43	TUL	VIS	26M		CITY OF LINDSAY	13												13
44	SMC	SQL	26M		CITY OF MENLO PARK	96												96
45	SMC	SQL	26A		CITY OF MENLO PARK - AGENCY	102												102
46	SC	SQL	26M		CITY OF MOUNTAIN VIEW	132												132
47	SC	SQL	26A		CITY OF MOUNTAIN VIEW - AGENCY	35												35
48	SC	SQL	26M		CITY OF PALO ALTO	420												420
49	SC	SQL	26A		CITY OF PALO ALTO - AGENCY	212												212
50	SMC	SQL	26M		CITY OF REDWOOD CITY	256												256
51	MRY	SNS	26M		CITY OF SALINAS	223												223
52	SMC	SQL	26M		CITY OF SAN MATEO-MAINT/LIB	112												112

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
County	Office	B	C		Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	AVERAGE
53	SMC	SQL	26	M	CITY OF SAN MATEO-MAINT/LIB - AGE	33											33
54	SCR	SQL	26	M	CITY OF SANTA CRUZ	479											479
55	SCR	SCR	26	A	CITY OF SANTA CRUZ - AGENCY	48											48
56	SCR	SCR	26	M	CITY OF SCOTT'S VALLEY	23											23
57	KER	BFL	26	M	CITY OF SHAFTER	53											53
58	MRY	SNS	26	M	CITY OF SOLEDAD	43											43
59	SC	SQL	26	M	CITY OF SUNNYVALE	50											50
60	KER	BFL	26	M	CITY OF TAFT	15											15
61	TUL	HAN	26	M	CITY OF TULARE	118											118
62	TUL	HAN	26	A	CITY OF TULARE - AGENCY	19											19
63	KER	BFL	26	M	CITY OF WASCO	51											51
64	SCR	SCR	26	M	CITY OF WATSONVILLE	55											55
65					SCHOOLS												
66	SC	SJC	12	M	CAMPBELL-UHSD	64											64
67	SC	SJC	12	M	CUPERTINO SD	48											48
68	SC	SJC	12	A	CUPERTINO SD - AGENCY	21											21
69	KER	BFL	12	M	EDISON ELEMENTARY	25											25
70	FAT	FAT	12	M	FASTA	216											216
71	FAT	FAT	12	A	FASTA - AGENCY	163											163
72	FAT	FAT	12	M	FRESNO UNIFIED SCHOOL	520											520
73	FAT	FAT	12	A	FRESNO UNIFIED SCHOOL - AGENCY	100											100
74	MRY	SNS	12	M	GONZALES UNIFIED SCH DIST	5											5
75	FAT	FAT	12	M	LAIDLAW / FIRST STUDENT INC.	195											195
76	SC	SJC	12	M	MORGAN HILL USD	298											298
77	SC	SJC	12	M	ORCHARD SD	28											28
78	FAT	FAT	12	M	RIVERDALE UNIFIED	56											56
79	STA	FAT	12	M	SALIDA UNION SCHOOL	39											39
80	SCR	SCR	12	M	SAN LORENZO VALLEY	101											101
81	SMC	SJC	12	M	SAN MATEO COE	-											-
82	SC	SJC	12	M	SANTA CLARA COE	1,381											1,381
83	KER	BFL	12	M	STANDARD SCHOOL	59											59
84	KER	BFL	12	M	TAFT UNION HIGH SCHOOL DIST	46											46
85	SC	SJC	12	M	WEST VALLEY CCD	269											269
86					PRIVATE NON-PROFIT												
87	SC	SJC	12	M	ACHIEVEKIDS	97											97
88	SC	SQL	26	M	MOMENTUM	239											239
89	SC	SQL	26	A	MOMENTUM - AGENCY	5											5
90	SC	SJC	12	M	AMERICAN REDCROSS	48											48
91	SB	SNS	26	M	CHAMBERLAIN'S CHILDRENS CENTER	35											35
92	MRY	SNS	12	M	M.A.O.F (FORMALLY CHILDRENS CENTER	52											52
93	MAD	FAT	26	M	COMMUNITY ACTION PART MADERA	116											116
94	KER	FAT	26	M	COMMUNITY ACTION KERN	329											329
95	KIN	VIS	26	M	COMMUNITY ACTION KINGS	23											23
96	SCR	SCR	26	M	COMMUNITY BRIDGES	-											-
97	SC	SJC	24	M	COMMUNITY SOLUTIONS	-											-
98	SC	SJC	26	M	GARDNER FAMILY HEALTH CTR	125											125
99	MER	FAT	26	M	GOLDEN VALLEY HEALTH CTR	365											365
100	SC	SJC	24	M	HOPE REHABILITATION	179											179
101	SC	SJC	26	M	HUMANE SOCIETY	12											12
102	SC	SJC	26	A	HUMANE SOCIETY - AGENCY	13											13
103	SC	SJC	12	M	OSHMANS FAMILY JCC	45											45

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
County	Office	B	C		Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	AVERAGE
104	SC	SJC	24	M	MACASA	31											31
105	SMC	SQL	12	M	PENINSULA JEWISH COMM CTR	58											58
106	SC	SJC	26	M	REBEKAH	72											72
107	SCR	SCR	26	M	SALUD PARA LA GENTE INC.	123											123
108	SCR	SCR	26	M	SANTA CRUZ COMM COUNSELING	102											102
109	SC	SJC	26	M	STARLIGHT	57											57
110	TUL	VIS	12	M	STUDENT TRANSPORTATION	33											33
111	SCR	SCR	26	M	WOMEN'S CRISIS SUPPORT	19											19
112					HOME CARE												
113	SC	SJC	24	M	ADDUS	59											59
114	SMC	SQL	12	M	IHSS SAN MATEO	1,767											1,767
115	SMC	SQL	12	A	IHSS SAN MATEO - AGENCY	964											964
116	SC	SJC	12	M	IHSS SANTA CLARA	9,268											9,268
117	SC	SJC	12	A	IHSS SANTA CLARA - AGENCY	4,209											4,209
118	SC	SJC	12	M	OLDER ADULTS CARE MGMT	120											120
119	SMC	SJC	12	M	PATHWAYS CONTINUOUS CARE	123											123
120					SPECIAL DISTRICTS												
121	KER	BFL	26	M	ARVIN-EDISON WATER STORAGE DIS	8											8
122	KER	BFL	12	M	BEAR VALLEY	27											27
123	FAT	FAT	26	M	CENTRAL CA LEGAL SERVICES	36											36
124	MRY	SNS	26	M	CHISPA HOUSING MANAGEMENT	27											27
125	FAT	FAT	26	M	COURT - FRESNO COUNTY	256											256
126	FAT	FAT	26	A	COURT - FRESNO COUNTY - AGENCY	66											66
127	KER	BFL	26	M	COURT - KERN COUNTY	304											304
128	KER	BFL	26	A	COURT - KERN COUNTY - AGENCY	74											74
129	KIN	VIS	26	M	COURT - KINGS COUNTY	56											56
130	KIN	VIS	26	A	COURT - KINGS COUNTY - AGENCY	3											3
131	MAR	FAT	26	M	COURT - MARIPOSA	7											7
132	MRY	SNS	26	M	COURT - MONTEREY COUNTY	-											-
133	MRY	SNS	26	A	COURT - MONTEREY COUNTY - AGEN	-											-
134	SB	SNS	26	M	COURT - SAN BENITO	25											25
135	SCR	SCR	26	M	COURT - SANTA CRUZ	57											57
136	SCR	SCR	26	A	COURT - SANTA CRUZ - AGENCY	1											1
137	SC	SJC	26	M	COURT - SCCO	570											570
138	SC	SJC	26	A	COURT - SCCO SUPERIOR - AGENCY	13											13
139	SMC	SJC	26	M	COURT - SMC	158											158
140	SMC	SJC	26	A	COURT - SMC - AGENCY	62											62
141	TUL	VIS	26	M	COURT - TULARE	189											189
142	FAT	FAT	12	M	HOUSING AUTHORITY - FAT	104											104
143	FAT	FAT	12	A	HOUSING AUTHORITY - FAT AGENCY	34											34
144	MRY	SNS	26	M	HOUSING AUTHORITY - MONTEREY	64											64
145	SC	SJC	26	M	HOUSING AUTHORITY - SCCO	111											111
146	SC	SJC	26	A	HOUSING AUTHORITY - SCCO AGENCY	25											25
147	KER	BFL	26	M	KERN COUNTY CEMETARY	4											4
148	KER	BFL	26	M	KERN COUNTY WATER AGENCY	26											26
149	KER	BFL	26	A	KERN COUNTY WATER AGENCY - AGE	25											25
150	KER	FAT	26	M	KERN REGIONAL CENTER	158											158
151	SC	SJC	24	M	LAW FOUNDATION	53											53
152	TUL	BFL	26	M	LINDSAY STRATHMORE IRRIGATION	2											2
153	MRY	SNS	26	M	MONTEREY BAY UNIFIED AIR POLL CONTF	27											27
154	SB/MRY	SNS	26	M	MV PUBLIC TRANSPORTATION	96											96

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	
County	Office	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
						Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	AVERAGE
2	SC	SJC	26	M	SAN ANDREAS REG CTR	225												225
155	SB	SNS	26	M	SAN BENITO CO WATER DISTRICT	13												13
156	KER	FAT	26	M	SAN JOAQUIN VALLEY AIR POLLUTION	122												122
157	KER	FAT	26	A	SAN JOAQUIN VALLEY AIR POLLUTION - A	102												102
158	SCR	SCR	26	M	SANTA CRUZ METRO TRANSIT DIST	87												87
159	SCR	SCR	26	A	SANTA CRUZ METRO TRANSIT DIST -	1												1
160	SCR	SCR	26	M	SANTA CRUZ REGIONAL TRANS COMI	-												-
161	SCR	SCR	26	M	SOQUEL CREEK WATER DISTRICT	11												11
162	KER	BFL	12	M	SSJMUD	-												-
163	SC	SJC	26	M	VTA	261												261
164	SCR	SCR	26	M	YWCA	10												10
165	SC	SJC		M	ASSOCIATE MEMBERS	-												-
166	SC	SJC		M	RETIRED MEMBERS	924												924
167	SC	SJC		M	CAL-PER RETIREES	36												36
168	SC	SJC	26	M	521 STAFF	36												36
169	SC	SJC																
170	SC	SJC																
171																		
172					TOTAL	56,728												56,728

	F	G	K	L
1				2011 - 12 months
2				
3	Headcount	TOTAL DUES RECEIPTS		30,699,660
4	57,172	OTHER INCOME		
5		Interest & Dividends		5,000
6		SMIHSS Administrative Reimbursement		50,000
7		Sublease Rent		79,137
8		Misc. Income - SEIU Int'l subsidy		28,980
9	A	Misc. items spend from saving accounts		
10		Total Misc. Income		163,117
11		TOTAL GENERAL FUND INCOME		30,862,777
12		GENERAL FUND EXPENSES		
13		ORGANIZING OFFSET		4,048,396
14		SALARIES		
15	4	Administrative		367,358
16	7	Admin Support		461,342
17	14	Directors		1,234,534
18	71	Internal Organizers/Research,CED,CESA		4,643,594
19	21	Clerical		1,059,536
20	2	Facilities		93,512
21	6	Data Base		335,939
22	A	Special project - pay by other funding		-
23		Temp. Internal Organizers/Research		3,000
24		Temp. Clerical/Support		3,000
25		Vacation & Comp Time		592,158
26		Total Salaries		8,793,973
27	125	PAYROLL RELATED EXPENSES		
28		Pension		1,147,414
29		Payroll Taxes Expenses		819,582
30		Travel Staff-Admin		50,714
31		Travel Staff- Internal Organizers		62,081
32		Mileage/Ins. Reimb.-Admin & Director		7,793
33		Mileage/Ins. Reimb.-Internal Organizers		213,730
34		Telephone Reimbursement		86,827
35	10	Retiree Health Exp		109,918
36		Retire Benefit Trust Fund		12
37		Benefits(Health, Dental, Vision,life,401K,Flex Plan matching)		3,419,101
38		Workers Comp Insurance		172,898
39		Recruiting exp		3,986
40		Total Payroll Related Expenses		6,094,056
41		Total Salaries & Payroll Expenses		14,888,029
42		MISCELLANEOUS		
43		Agency Fee/Assoc. Exp.		360,000
44		Capital Fund Expense		12,000
45		Admin exp share w. chapter		6,074
46		Free Life insurance to members (SCR, MRY & BFL)		56,499
47		Dodge Scholarship		15,000
48		Computer Database UnionWare		104,400
49	A	Accounting Software Gp		12,000
50		MRC - IHSS - 4 months only		60,000
52		Total Miscellaneous		625,973
53				
54		ARBITRATIONS & LEGAL		
55		Arbitrations Fees & legal fees - representation		166,971
57		Retainer		118,686
58	57,172	Automatic Legal Defense Fund (\$0.25 per member per month)		171,516
59		Total Arbitrations & Legal		663,149

	F	G	K	L
1				2011 - 12 months
60				
61		FACILITIES		
63		Rent-SQL		54,382
64		Mortgage - Monterey & Parking		5,178
65		Rent-Santa Cruz, Watsonville & Hollister		74,928
66		Rent-Visalia		13,510
67		Utilities		174,613
68		Kitchen Sundries		29,296
69		Gen. Liab. Ins. & Property Tax		178,677
70		Building Maintenance/Security/Janitorial		173,017
71		Total Admin - Facilities		703,600
72				
73		ADMINISTRATIVE - OFFICES		
74		Audit/Acct. Fees		158,119
75		Staff NEG Consultant		5,552
76		Subscriptions		54,376
77		Office Sundries		194,427
78		Office Equipment Leases		140,443
79		Equipment Maintenance & Repair Contracts		34,717
80		Contributions		5,565
81		Research Material & Data		12,000
82		Total Admin - Offices		605,198
83				
84		COMMUNICATIONS		
85		Printing		47,094
86		Paper		16,622
88		Telephone & Internet		199,785
89		Postage		67,537
90		Professional Fees/Translations		9,363
91		Total Communications		344,351
92				
93		CONFERENCES/MILEAGE		
94		Staff-Misc. Conf/Seminar		4,141
95		Exec. Board-Conferences		1,629
96		Misc. Members-Reimbursed		1,800
97		Total Conferences/Mileage		7,570
98				
99		STAFF MEETING & TRAINING		
100		Staff / Director Training		29,441
101		Staff - representation & political & communication		41,216
102		Clerical Staff		2,351
103		Executive Staff		1,200
104		Tuition Reim.-Internal Organizers		1,000
105		Tuition Reim.-OPEIU		1,000
106		Total Staff Training		76,209
107				
108		EDUCATION & TRAINING		
109		Steward & Chief Steward Training		4,206
110		Executive Board		2,000
111		Education & Training Committee Meeting & Materials		202
112		Industry Training Events		5,218
113		Total Education & Training		11,626
114				

	F	G	K	L
1				2011 - 12 months
115		POLITICAL/SOCIAL INVOLVEMENT		
116	40,764	Candidates Account (\$0.20 per member per month)		97,834
117	40,764	Issues Account (\$0.00 per member per month)		-
118		Legal		113,105
119		Committee Meetings		17,348
120		Conferences		1,000
121		Electoral Staff/ Activity		1,000
122		Polls & Surveys		1,000
123		Special Printing		196
124		Subscriptions		500
125		Total Political/Social Involvement		231,982
126				
127		SOCIAL & ECONOMIC JUSTICE		
128		Committee Meetings		5,000
129		Conferences		350
130		Contributions/Solidarity		4,530
131	57,172	Caucus Activities		80,670
132		Total Social & Economic Justice		90,550
133				
134		MEMBER INVOLVEMENT		
135		Memorabilia/Give away Member Pride		13,086
136		Awards/Recognition		500
137		Ex Board / Advisory Board Reimbursement		1,000
138		Rally Rental & Bus		12,446
139		Member Reimbursement/Lost time		9,567
140		Transportation & Vehicle Expenses		5,919
141		Total Member Involvement		42,518
142				
143		NEGOTIATIONS		
144		Printing Contracts		5,000
145		Meetings & Supplies		19,111
146		Strike Preparations		10,000
147	40,764	Automatic Strike Fund Transfer (\$0.50 per member/mom)		244,584
148		Total Negotiations		278,695
149		MEETINGS & EVENTS		
150		Executive Board Meetings		15,518
151		Steward/Council meetings		6,196
152	57172	521 Party & other events		-
153		Delegate Vote & Convention 2011		171,516
154		Industries & Members conference		1,543
155		Miscellaneous		1,000
156		Total Meetings & Events		195,772
157				
158		REPRESENTATIVE DUES		
159	56,584	SEIU \$7.65 ea		5,194,411
160	52,685	SEIU Unity Fund \$5.00ea		3,161,100
161	588	SEIU Retirees \$1.00ea		7,056
162	56,584	SEIU/ State Council-\$2.53ea		1,717,890
163	900	Nurse Alliance \$1.45ea		15,660
164	25,902	So Bay CLC Jul/10 2\$0.60, Jun/11 2\$0.63		191,934
165	4,000	SMCO CLC \$0.60ea		28,800
166	8,524	Fresno CLC \$0.45ea		46,030
167	7,482	Bakersfield CLC \$0.25ea		22,446
168	6,157	Monterey & Santa Cruz LC \$0.55ea		40,636
169	110	Tuolumne CLC		1,320
170	56,584	CA Labor Fed 25% X .70ea		118,826
171		Building Trades-SMCO		3,600
172		Total Representative Dues		10,549,709

	F	G	K	L
1				2011 - 12 months
173				
174		TOTAL EXPENSES		33,363,329
175				
176		TOTAL INCOME LESS TOTAL EXPENSES		(2,500,552)
177				
178		VOLUNTARY TRANSFERS		
179		Building Funds		156,000
180		Strike Fund		-
181		Total Transfers		156,000
182		TOTAL INCOME LESS EXPENSES & TRANSFERS		(2,656,552)
183				
184		Fix cost		
185		variable cost		
186		payroll driven		
187		instruct by e-board		

SEIU Local 521 Executive Board Motion

Motion Number: 06

Date: March 19, 2011

Motion Title: Approval of the Corrected Proposed Revised 2011 General Fund Budget

Recommended By: The SEIU Local 521 Budget and Finance Committee

Background: There have been some proposed changes to the 2011 General Fund Budget approved at the December 4, 2010, Executive Board Meeting in an effort to produce a less deficit budget and to correct some errors. Some of the proposed changes include: 1. Decrease in staff budgeted line items by \$544,595.00 because there was a misunderstanding - 6 new Internal Organizers who were also leads were budgeted rather than 6 lead differentials for employed Internal Organizers. 2. Legal Defense Savings per month was reduced from \$14,000 to \$7,000 = \$89,188.00 a year. 3. Strike Fund savings was reduced to \$1 for this budget period = \$244,572.00. 4. The Local Convention line item was reduced from \$171,000 to \$71,000 = \$100,000. 5. The organizing offset was reduced by about \$20,000 per year. 6. The Building Fund was reduced by \$155,988.00 for the year. 7. An error in addition increased rents by \$474,000 for the year. These changes have resulted in a reduction in the annual budget deficit by \$680,343.00.

Again, since times are unpredictable and our income is to some degree uncertain, the Budget and Finance Committee has recommended that the proposed Budget for 2011 be approved with the proviso that it will be revisited by the Budget and Finance Committee with recommendations of staff on a monthly, quarterly, or as needed basis and adjustments made. Staff and Members are to be diligent in cutting costs and saving money wherever possible. In this way we hope to be on our way to getting out of the deficit pursuant to the end of 2012.

Motion: To approve the corrected proposed revised 2011 General Fund Budget with the proviso that it will be revisited and adjusted on a monthly, quarterly, or as needed basis.

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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	F	G	L	M
1			2011 - 12 months	factor , ruling
2				
3	Headcount	TOTAL DUES RECEIPTS	30,699,660	avg 9 mos + new dues 1.45%, no change on Hanford area
4	57,172	OTHER INCOME		
5		Interest & Dividends	5,000	
6		SMIHSS Administrative Reimbursement	50,000	
7		Sublease Rent	79,137	
8		Misc. Income - SEIU Int'l subsidy	28,980	
9	A	Misc. items spend from saving accounts		
10		Total Misc. Income	163,117	
11		TOTAL GENERAL FUND INCOME	30,862,777	
12		GENERAL FUND EXPENSES		
13		ORGANIZING OFFSET	4,029,990	
14		SALARIES		
15	5	Administrative	451,620	actual payroll
16	6	Admin Support	377,080	actual payroll
17	12	Directors	1,064,093	actual payroll
18	67	Internal Organizers/Research,CED,CESA	4,499,160	actual payroll, 1 CESA start 4/2011, 1 Hanford 7/2011
19	20	Clerical	1,026,841	actual payroll + bonus
20	2	Facilities	93,512	actual payroll + bonus
21	6	Data Base	335,939	actual payroll + bonus
22	A	Special project - pay by other funding	-	7,848,246
23		Temp. Internal Organizers/Research	3,000	
24		Temp. Clerical/Support	3,000	
25		Vacation & Comp Time	592,158	
26		Total Salaries	8,446,404	
27	118	PAYROLL RELATED EXPENSES		
28		Pension	1,098,754	actual from payroll
29		Payroll Taxes Expenses	784,825	actual from payroll
30		Travel Staff-Admin	50,714	avg 9 mos
31		Travel Staff- Internal Organizers	62,081	avg 9 mos
32		Mileage/Ins. Reimb.-Admin & Director	7,793	no new rate for 2011, auto ins. To \$160/mo
33		Mileage/Ins. Reimb.-Internal Organizers	213,730	no new rate for 2011, auto ins. To \$160/mo
34		Telephone Reimbursement	86,827	avg 9 mos
35	10	Retiree Health Exp	109,918	actual from HR
36		Retire Benefit Trust Fund	12	
37		Benefits(Health, Dental, Vision,life,401K,Flex Plan matching)	3,305,491	actual from HR
38		Workers Comp Insurance	172,898	actual from payroll
39		Recruiting exp	3,986	avg 9 mos
40		Total Payroll Related Expenses	5,897,030	
41		Total Salaries & Payroll Expenses	14,343,434	
42		MISCELLANEOUS		
43		Agency Fee/Assoc. Exp.	360,000	30000
44		Capital Fund Expense	12,000	1000
45		Admin exp share w. chapter	6,074	avg 9 mos
46		Free Life insurance to members (SCR, MRY & BFL)	56,499	avg 9 mos + 10% membership change
47		Dodge Scholarship	15,000	1250
48		Computer Database UnionWare	104,400	8700
49	A	Accounting Software Gp	12,000	1,000
50		MRC - IHSS - 4 months only	60,000	15000
51		Total Miscellaneous	625,973	
52				
53		ARBITRATIONS & LEGAL		
54		Arbitrations Fees & legal fees - representation	166,971	avg 9 mos
55	A	Arbitrations Fees & legal fees - admin.	205,976	
56		Retainer	118,686	avg 9 mos
57	57,172	Automatic Legal Defense Fund (\$0.12 per member per month)	82,328	0.12
58		Total Arbitrations & Legal	573,961	

	F	G	L	M
1			2011 - 12	factor , ruling
59			months	
60		FACILITIES		
61		Rent-SJC	473,750	avg 9 mos + rent increase
62		Rent-SQL	54,382	avg 9 mos + rent increase
63		Mortgage - Monterey & Parking	5,178	avg 9 mos
64		Rent-Santa Cruz, Watsonville & Hollister	74,928	avg 9 mos + CAM increase
65		Rent-Visalia	13,510	avg 9 mos + new apartment as needed w/new rate
66		Utilities	174,613	avg 9 mos + 0.02 increase
67		Kitchen Sundries	29,296	avg 9 mos + 0.02 increase
68		Gen. Liab. Ins. & Property Tax	178,677	avg 9 mos + 0.02 rate will increase
69		Building Maintenance/Security/Janitorial	173,017	avg 9 mos + 0.02 increase
70		Total Admin - Facilities	1,177,350	
71				
72		ADMINISTRATIVE - OFFICES		
73		Audit/Acct. Fees	158,119	avg 9 mos + 0.02 increase
74		Staff NEG Consultant	5,552	avg 9 mos + 0.02 increase
75		Subscriptions	54,376	avg 9 mos + 0.02 increase
76		Office Sundries	194,427	avg 9 mos + 0.02 increase
77		Office Equipment Leases	140,443	avg 9 mos
78		Equipment Maintenance & Repair Contracts	34,717	avg 9 mos + more usage because delegate election
79		Contributions	5,565	avg 9 mos
80		Research Material & Data	12,000	
81		Total Admin - Offices	605,198	
82				
83		COMMUNICATIONS		
84		Printing	47,094	avg 9 mos + 0.02 increase
85		Paper	16,622	avg 9 mos + 0.02 increase
87		Telephone & Internet	199,785	avg 9 mos + 0.02 increase
88		Postage	67,537	no new rate yet, more usage because delegate election
89		Professional Fees/Translations	9,363	avg 9 mos + 0.02 increase
90		Total Communications	344,351	
91				
92		CONFERENCES/MILEAGE		
93		Staff-Misc. Conf/Seminar	4,141	avg 9 mos + 0.02 increase
94		Exec. Board-Conferences	1,629	avg 9 mos + 0.02 increase
95		Misc. Members-Reimbursed	1,800	
96		Total Conferences/Mileage	7,570	
97				
98		STAFF MEETING & TRAINING		
99		Staff / Director Training	29,441	avg 9 mos + 0.02 increase
100		Staff - representation & political & communication	41,216	avg 9 mos + 0.02 increase
101		Clerical Staff	2,351	avg 9 mos + 0.02 increase
102		Executive Staff	1,200	
103		Tuition Reim.-Internal Organizers	1,000	
104		Tuition Reim.-OPEIU	1,000	
105		Total Staff Training	76,209	
106				
107		EDUCATION & TRAINING		
108		Steward & Chief Steward Training	4,206	avg 9 mos + 0.02 increase
109		Executive Board	2,000	
110		Education & Training Committee Meeting & Materials	202	avg 9 mos + 0.02 increase
111		Industry Training Events	5,218	avg 9 mos + 0.02 increase
112		Total Education & Training	11,626	
113				

	F	G	L	M
1			2011 - 12 months	factor , ruling
114		POLITICAL/SOCIAL INVOLVEMENT		
115	40,764	Candidates Account (\$0.20 per member per month)	97,834	0.2
116	40,764	Issues Account (\$0.00 per member per month)	-	
117		Legal	113,105	avg 9 mos + 0.02 increase
118		Committee Meetings	17,348	avg 9 mos + 0.02 increase
119		Conferences	1,000	
120		Electoral Staff/ Activity	1,000	
121		Polls & Surveys	1,000	
122		Special Printing	196	avg 9 mos + 0.02 increase
123		Subscriptions	500	
124		Total Political/Social Involvement	231,982	
125				
126		SOCIAL & ECONOMIC JUSTICE		
127		Committee Meetings	5,000	same as 2010 per SEJ
128		Conferences	350	same as 2010 per SEJ
129		Contributions/Solidarity	4,530	same as 2010 per SEJ
130	57,172	Caucus Activities	80,670	same as 2010 per SEJ
131		Total Social & Economic Justice	90,550	same as 2010 per SEJ
132				
133		MEMBER INVOLVEMENT		
134		Memorabilia/Give away Member Pride	13,086	avg 9 mos + 0.02 increase
135		Awards/Recognition	500	
136		Ex Board / Advisory Board Reimbursement	1,000	
137		Rally Rental & Bus	12,446	avg 9 mos + 0.02 increase
138		Member Reimbursement/Lost time	9,567	avg 9 mos + 0.02 increase
139		Transportation & Vehicle Expenses	5,919	avg 9 mos + 0.02 increase
140		Total Member Involvement	42,518	
141				
142		NEGOTIATIONS		
143		Printing Contracts	5,000	
144		Meetings & Supplies	19,111	avg 9 mos + 0.02 increase
145		Strike Preparations	10,000	
146	40,764	Automatic Strike Fund Transfer - reduction to \$1/mon	12	1
147		Total Negotiations	34,123	
148		MEETINGS & EVENTS		
149		Executive Board Meetings	15,518	avg 9 mos + 0.02 increase
150		Steward/Council meetings	6,196	avg 9 mos + 0.02 increase
151	57172	521 Party & other events	-	0
152		Delegate Vote & Convention 2011	71,465	1.25
153		Industries & Members conference	1,543	avg 9 mos + 0.02 increase
154		Miscellaneous	1,000	
155		Total Meetings & Events	95,721	
156				
157		REPRESENTATIVE DUES		
158	56,584	SEIU \$7.65 ea	5,194,411	7.65
159	52,685	SEIU Unity Fund \$5.00ea	3,161,100	5.00
160	588	SEIU Retirees \$1.00ea	7,056	1.00
161	56,584	SEIU/ State Council-\$2.53ea	1,717,890	2.53
162	900	Nurse Alliance \$1.45ea	15,660	1.45
163	25,902	So Bay CLC Jul/10 2\$0.60, Jun/11 2\$0.63	191,934	0.60
164	4,000	SMCO CLC \$0.60ea	28,800	0.60
165	8,524	Fresno CLC \$0.45ea	46,030	0.45
166	7,482	Bakersfield CLC \$0.25ea	22,446	0.25
167	6,157	Monterey & Santa Cruz LC \$0.55ea	40,636	0.55
168	110	Tuolumne CLC	1,320	110.00
169	56,584	CA Labor Fed 25% X .70ea	118,826	0.70
170		Building Trades-SMCO	3,600	300
171		Total Representative Dues	10,549,709	

	F	G	L	M
1			2011 - 12 months	factor , ruling
172				
173		TOTAL EXPENSES	32,840,266	
174				
175		TOTAL INCOME LESS TOTAL EXPENSES	(1,977,489)	
176				
177		VOLUNTARY TRANSFERS		
178		Building Funds	12	1
179		Strike Fund	-	
180		Total Transfers	12	
181		TOTAL INCOME LESS EXPENSES & TRANSFERS	(1,977,501)	
182				
183		Fix cost		
184		variable cost		
185		payroll driven		
186		instruct by e-board		

SEIU Local 521 Executive Board Motion

Motion Number: 07

Date: March 19, 2011

Motion Title: Approval of the Proposed 2011 Organizing Budget

Recommended By: The SEIU Local 521 Budget and Finance Committee

Background: The Organizing Budget for 2011 has been prepared and the Budget and Finance Committee recommends that it be approved.

Motion: To approve the proposed 2011 Organizing Budget as presented.

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
Organizing Budget for Year 2011

DRAFT only

	2011 Budget - ORG	
Budget from SEIU Local 521	4,029,990	
Expenses		
Legal - Organize	28,200	
Arbitration - Organizing	-	
Lost Time - Organizing / WAINERS 4	600,000	a
Salaries - Organizing (17+2)	1,142,045	
Workers Comp. Ins. - Org	20,386	
Payroll Tax Exp - Organ.	102,784	
401K Matching	34,261	
EMPLOYEE BENEFITS - Organizing	433,163	
Pension Plan Exp - Organi.	159,886	
Staff Recruiting Exp-Org.	100	
Vacation / Comp Time - Org	131,774	
Training Exp - Org.	8,000	
Mileage reimb exp - Organizing	147,600	
Vehicle Expenses	11,000	
RENT EXPENSES - Organizing	55,200	b
Telephone Expenses - Organizing	22,800	b
Utilities Expenses	4,200	b
Office Supplies & Other Allocation - Organize	12,000	b
Printing Expenses - Organizing	200	
Postage Expenses - Organizing	600	b
PT Organizing		
Communication Cost Expenses	3,600	
Referral lead/DATA - Organizing	940	
Professional Fee Expenses		
Translation Expenses - Organ		
Equipment Leasing Exp - Organi	3,600	b
Equip. Maint. & Repair -Organi	1,200	b
Building Maint. & Repair - Organ.	1,800	b
Computer Database Services	9,400	
Subscriptions - Organizing		
Travel Expenses - ORGANIZING	230,000	
Conference - Organizing		
Rally / Bus Rental-Organizing	-	
Memorabilia / Give Away-Org	-	
Meeting - Organizing	3,600	
Donation - Organizing	1,500	
SEIU Int'l - share cost	300,000	
Total Expenses	3,469,840	
Net Income	560,150	
a - \$200K was from 2010 wavers		
b - share 6 mos. Cost of Hanford office		

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SEIU Local 521 Executive Board Motion

Motion Number: 13

Date: March 19, 2011

Motion Title: Additional motion with Motion 6 & 7

Recommended By:

Background:

Authorizing CEO/President/Treasurer to achieve savings through:
- transition of 120 shifts to organizing beginning in April 2011

Motion: - recognize vacancies up to 294,000 + 162,000 (of staff)
- broach early retirement with staff & work with personnel committee
- negotiate an extension with the International of 1 month's percapitas for 18-24 months

Follow Up:

Projected savings: 504,000
294,000
162,000
unknown

Moved by: Moved Second: 800,000 / 1,760,000 Seconded

Amendment:

Amended By:

Votes in Favor: Votes Opposed: Abstentions:

Motion: Carries [X] Fails: [] Tabled Until: [] Date: []

Signatures

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SEIU Local 521 Executive Board Motion

Motion Number: 08

Date: March 19, 2011

Motion Title: Accept the Auditor's Report on the Local 401(k) and continue with our Current Practices

Recommended By: The SEIU Local 521 Budget and Finance Committee

Background: A report from the 401(k) auditors was written on September 29, 2010. It was received shortly thereafter. The recommendation of the auditors was that the Local should hire a person dedicated to handle the staff 401(k) investments and investment vehicles. This person would do actuarials studies of how the various funds performed and make recommendations as to what should be used and make sure that problems are detected and corrected quickly. This person would also be responsible for furnishing the auditors and the Local with a complete set of Financial Statements with footnotes. The auditors felt that unless this was done a material weakness exists in the 521 401(k) Plan's internal control.

Unfortunately, this type of staff person is outside the financial ability of SEIU Local 521. Local staff and elected officers are doing their best to provide controls that protect the money invested by staff into the Local 401(k) plan. Audits to confirm that the money deducted and matched is correct are done quarterly, and a conservative investment company is used to provide investment vehicles for staff. Additionally, it is felt that having the auditors produce the financial statements gives an unbiased third-party evaluation of the financial state of the Local. It is recommended that the Local continue our current practices regarding the Local 401(k) Plan.

Motion: To accept the report from the SEIU Local 401(k) Plan auditors, and continue our current practices regarding the Local 401(k) Plan.

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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September 29, 2010

To: Kristy M. Sermersheim
SEIU Local 521 401(k) Plan

We have conducted a DOL limited-scope audit of the financial statements of SEIU Local 521 401(k) Plan for the year ended December 31, 2009 and have issued our report thereon dated September 29, 2010. As permitted by 29 CR 2520.103-8 of the Department of Labor's Rules and Regulations for Reporting and Disclosure under the Employee Retirement Income Security Act of 1974, the plan administrator instructed us not to perform, and we did not perform, any auditing procedures with respect to the information summarized in Note 2 to those financial statements. Because of the significance of the information that we did not audit, we are unable to, and have not, expressed an opinion on those financial statements and schedules taken as a whole. Professional standards require that we provide you with information about our responsibilities under generally accepted auditing standards, as well as certain information related to the planned scope and timing of our audit. We have communicated such information in our letter to you dated January 21, 2010. Professional standards also require that we communicate to you the following information related to our audit.

Significant Audit Findings

Qualitative Aspects of Accounting Practice

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by SEIU Local 521 401(k) Plan are described in Note 2 to the financial statements. No new accounting policies were adopted and the application of existing policies was not changed during 2009. We noted no transactions entered into by the Plan during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper period.

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ significantly from those expected. The most sensitive estimates affecting the financial statements were:

- 1) Management's estimate of the fair value of investments is based on information provided by Wilmington Trust Company is a significant estimate. We evaluated the key factors and assumptions used to develop the estimate of investments in determining that it is reasonable in relation to the financial statements taken as a whole.
- 2) Management has not recorded an allowance for participant loan accounts as they believe that all loans are collectible. We evaluated the key factors and assumptions used to develop management's decision to not record a bad debt allowance for the participant loan accounts and determined it is reasonable in relation to the financial statements taken as a whole.

Certain financial statement disclosures are particularly sensitive because of their significance to financial statement users. The most sensitive disclosure affecting the financial statements was:

The disclosure of fair value measurements in Note 3 to the financial statements. Management relies on information provided by Wilmington Trust Company for disclosure of information relative to fair values and types of investments.

Difficulties Encountered in Performing the Audit

We encountered no significant difficulties in dealing with management in performing and completing our audit.

Corrected and Uncorrected Misstatements

Professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that are trivial, and communicate them to the appropriate level of management. Management has corrected all such misstatements. In addition, none of the misstatements detected as a result of audit procedures and corrected by management were material, either individually or in the aggregate, to the financial statements taken as a whole.

Disagreements with Management

For purposes of this letter, professional standards define a disagreement with management as a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditor's report. We are pleased to report that no such disagreements arose during the course of our audit.

Management Representations

We have requested certain representations from management that are included in the management representation letter dated September 29, 2010.

Management Consultations with Other Independent Accountants

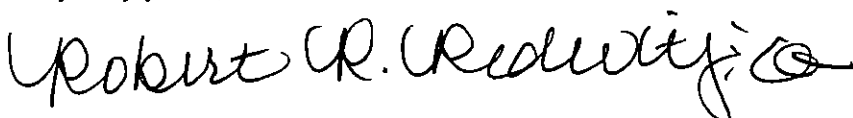
In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the Plan's financial statements or a determination of the type of auditor's opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

Other Audit Findings or Issues

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the Plan's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.

This information is intended solely for the use of the officers and board of directors of SEIU Local 521 and management of SEIU Local 521 401(k) Plan and is not intended to be and should not be used by anyone other than these specified parties.

Very truly yours,



ROBERT R. REDWITZ & CO.
An Accounting and Consulting Corporation

Communication of Significant Deficiencies and Material Weaknesses

The SEIU Local 521 401(k) Plan Administrative Committee
and Board of Directors of SEIU Local 521

Except as discussed in the following paragraph, in planning and performing our audit of the financial statements of SEIU Local 521 401(k) Plan as of and for the year ended December 31, 2009, in accordance with auditing standards generally accepted in the United States of America, we considered SEIU Local 521 401(k) Plan's internal control over financial reporting (internal control) as a basis for designing our auditing procedures for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Plan's internal control. Accordingly, we do not express an opinion on the effectiveness of the Plan's internal control.

We were engaged to perform a DOL limited-scope audit of those financial statements as permitted by 29 CFR 2520.103-8 of the Department of Labor's Rules and Regulations for Reporting and Disclosure under the Employee Retirement Income Security Act of 1974. Our audit did not include all of the procedures required by auditing standards generally accepted in the United States of America and did not include a consideration of internal control relating to the information summarized in Note 4 to those financial statements. Because of the significance of the information that we did not audit, we were unable to, and did not, express an opinion on those financial statements.

Our consideration of internal control was for the limited purpose described in the preceding paragraphs and was not designed to identify all deficiencies in internal control that might be significant deficiencies or material weaknesses and, therefore, there can be no assurance that all such deficiencies have been identified. However, as discussed below, we identified certain deficiencies in internal control that we consider to be material weaknesses and other deficiencies that we consider to be significant deficiencies.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A material weakness is a deficiency, or combination of deficiencies in internal control, such that there is a reasonable possibility that a material misstatement of the plan's financial statements will not be prevented, or detected and corrected on a timely basis. We consider the following deficiency in SEIU Local 521 401(k) Plan's internal control to be material weakness:

Lack of Financial Statement Knowledge and Ability to Prepare a Complete Set of Financial Statements
A system of internal control over financial reporting includes the controls over financial statement preparation, including footnote disclosures and supplemental schedules. While the auditor can assist with the presentation of your annual financial statements and related footnotes, the annual financial statements are the responsibility of management to prevent, detect and correct misstatements. A material weakness exists in instances where the organization is not capable of drafting the annual financial statements and all required footnote disclosures in accordance with accounting principles generally accepted in the United States of America.



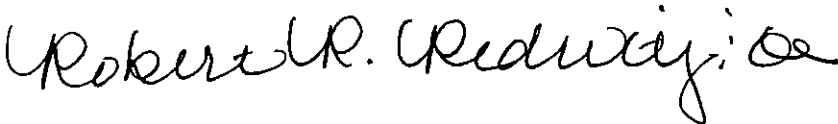
During our audit, we note that client personnel do not appear to have the necessary knowledge and skills to prepare employee benefit plan financial statements and footnote disclosures in accordance with generally accepted accounting principles.

As is common for many small to mid-sized entities, management relies on the audit firm to identify and disclose the accounting principles in the notes to the annual financial statements. We noted that representatives of the Company review the drafts of the annual financial statements and ensure they agree to the Company's records, however, they do not prepare its own annual financial statements complete with footnotes and supplemental schedules.

Our Recommendation

We recommend that the company utilize individuals from the corporate finance department with the requisite knowledge and skill in employee benefit plan generally accepted accounting principles to prepare the financial statements. In addition, we recommend that a current disclosure checklist from the AICPA be used to ensure propriety and completeness of the footnotes.

This communication is intended solely for the information and use of management, the board of directors of Conrad Imports, Inc., and others within the plan, and is not intended to be and should not be used by anyone other than these specified parties.



ROBERT R. REDWITZ & CO.
An Accounting and Consulting Corporation

San Jose, California
September 29, 2010

SEIU Local 521
401(k) Plan

FINANCIAL STATEMENTS
AND
SUPPLEMENTAL INFORMATION

DECEMBER 31, 2009

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INDEPENDENT AUDITORS' REPORT

To The Plan Administrator
SEIU Local 521 401(k) Plan

We were engaged to audit the financial statements of SEIU Local 521 401(k) Plan as of December 31, 2009 and 2008, and for the year ended December 31, 2009, and the supplemental information as of December 31, 2009 listed in the accompanying table of contents. These financial statements and schedule are the responsibility of the Plan's management.

As permitted by 29 CFR 2520.103-8 of the Department of Labor's Rules and Regulations for Reporting and Disclosure under the Employee Retirement Income Security Act of 1974, the plan administrator instructed us not to perform, and we did not perform, any auditing procedures with respect to the information summarized in Note 4, which was certified by Wilmington Trust Retirement and Institutional Services Company, the trustee of the Plan, except for comparing the information with the related information included in the financial statements and supplemental information. We have been informed by the plan administrator that the trustee holds the Plan's investment assets and executes investment transactions. The plan administrator has obtained a certification from the trustee as of and for the years ended December 31, 2009 and 2008, that the information provided to the plan administrator by the trustee is complete and accurate.

Because of the significance of the information that we did not audit, we are unable to, and do not, express an opinion on the accompanying financial statements and schedules taken as a whole. The form and content of the information included in the financial statements and schedules, other than that derived from the information certified by the trustee, have been audited by us in accordance with auditing standards generally accepted in the United States of America and, in our opinion, are presented in compliance with the Department of Labor's Rules and Regulations for Reporting and Disclosure under the Employee Retirement Income Security Act of 1974.

Robert R. Redwitz & Co.

ROBERT R. REDWITZ & CO.
An Accounting and Consulting Corporation

San Jose, California
September 29, 2010

SEIU Local 521**401(k) Plan**Statements of Net Assets Available for Benefits
December 31, 2009 and 2008

	<u>2009</u>	<u>2008</u>
ASSETS		
Investments at fair value:		
Mutual funds	\$ 1,479,783	\$ 603,818
Collective trust	268,516	86,926
Participant loans	62,879	40,660
	<u>1,811,178</u>	<u>731,404</u>
Total investments		
Receivable:		
Employer matching contributions	4,686	6,551
	<u>4,686</u>	<u>6,551</u>
Total receivable		
TOTAL ASSETS	<u>1,815,864</u>	<u>737,955</u>
LIABILITIES	<u>0</u>	<u>0</u>
NET ASSETS AVAILABLE FOR BENEFITS	<u>\$ 1,815,864</u>	<u>\$ 737,955</u>

SEIU Local 521**401(k) Plan**

Statement of Changes in Net Assets Available for Benefits
For the year ended December 31, 2009

ADDITIONS TO NET ASSETS ATTRIBUTED TO:

Investment income:

Net appreciation in fair value of plan assets	\$ 241,835
Interest and dividends	<u>29,909</u>

Total investment income	<u>271,744</u>
-------------------------	----------------

Contributions:

Participant contributions	382,976
Participant rollovers	633
Employer contributions	195,017
Transfer due to merger	<u>270,242</u>

Total contributions	<u>848,868</u>
---------------------	----------------

Total additions to net assets	<u>1,120,612</u>
-------------------------------	------------------

DEDUCTIONS FROM NET ASSETS ATTRIBUTED TO:

Benefits paid to participants	41,120
Administrative expenses	<u>1,583</u>

Total deductions from net assets	<u>42,703</u>
----------------------------------	---------------

Increase in net assets available for benefits	1,077,909
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Net assets available for benefits, beginning of period	<u>737,955</u>
--	----------------

NET ASSETS AVAILABLE FOR BENEFITS, END OF PERIOD	<u><u>\$ 1,815,864</u></u>
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SEIU Local 521

401(k) Plan

Notes to Financial Statements

Note 1 - Description of the plan

The following description of the SEIU Local 521 401(k) Plan (the "Plan") provides only general information. Participants should refer to the Plan agreement for a more complete description of the Plan's provisions.

General

SEIU Local 521 (the "Organization") established the Plan effective March 1, 2007. The Plan is a defined contribution plan covering substantially all employees of the Organization as defined in the Plan agreement. The Plan is subject to the provisions of the Employee Retirement Income Security Act of 1974 (ERISA). Employees are eligible to participate in the Plan on their date of hire.

Contributions

Eligible employees (participants) may contribute a portion of their annual compensation to the Plan, limited to 75% of compensation and the maximum amount allowed by law. Annual compensation is defined as an employee's annual taxable compensation including 401(k) deferrals. Participants who have attained age 50 before the end of the Plan year are eligible to make catch-up contributions. Participants may designate their contributions be made to any of the Plan's investment fund options. The Plan currently offers various mutual funds and collective trust as investment options for participants.

The Organization may make discretionary matching contributions. For the year ended December 31, 2009 the Organization made a matching contribution equal to 100% of the employee contributions up to 3% of compensation. All contributions are subject to certain limitations.

Rollover contribution

The Plan provides for rollover contributions, which represents contributions by participants from other tax-qualified retirement plans. The maximum amount of a participant's rollover contribution is not affected by the limits otherwise applicable to participant contributions.

Participant accounts

Each participant's account is credited with the participant's contribution and allocation of (a) the Organization's contributions, if any, and, (b) Plan earnings, and charged with an allocation of administrative expenses. The contributions are allocated within each participant's account based upon the participant's investment elections. Investment earnings are allocated based on the participant's investment elections. All amounts in participant accounts are participant-directed. The benefit to which a participant is entitled is the benefit that can be provided from the participant's vested account.

Vesting

Participants are immediately vested in their deferral contributions and the Organization matching contributions plus actual earnings thereon.

SEIU Local 521

401(k) Plan

Notes to Financial Statements

Note 1 - Description of the plan (continued)

Administrative expenses

The Organization pays substantially all administrative expenses for the Plan.

Participant loans

Participants may borrow from their fund accounts a minimum of \$1,000 up to a maximum of 50% of their vested account balance or \$50,000, whichever is less. The loans are secured by the vested balance in the participant's account and bear a reasonable rate of interest, which is commensurate with local prevailing rates of a commercial U.S. bank and are determined at the time the loan is made, currently ranging from 4.25% to 9.25%. Loan transactions are treated as transfers to (from) the investment funds from (to) a participant's loan receivable. Loan terms cannot exceed 5 years, unless the loan qualifies as a residential mortgage in which case a loan term may qualify for a period up to 30 years. Principal and interest is paid ratably through payroll deductions.

Payment of benefits

Benefits are payable to participants or designated beneficiaries upon retirement, termination, death, disability, or hardship. Distributions are paid in a lump-sum amount equal to the value of the participant's vested interest in his or her account.

Amounts due to inactive/terminated participants of the Plan amounted to \$162,771 as of December 31, 2009.

Hardship withdrawals

Participants may withdraw their vested employee deferral and employer match contributions in the event of hardship as defined by the Plan agreement.

Plan merger

Effective June 29, 2009, the board of directors of the Organization approved the merger of SEIU Local 715 401(k) Plan into this Plan. As a result, all investments of the SEIU Local 715 401(k) Plan were transferred into this plan in the amount of \$270,242.

Note 2 – Significant accounting policies

Basis of accounting

The financial statements of the Plan are prepared using the accrual method of accounting.

Investment valuation and income recognition

The Plan's investments are stated at their fair market value. Quoted market prices are used to value investments. Shares of mutual funds and collective trusts are valued at quoted market prices which represent the net asset value of shares held by the Plan at year-end. Participant loans are valued at their outstanding balances, which approximate fair value.

Purchases and sales of securities are recorded on a trade-date basis. Interest income is recorded when earned. Dividends are recorded on the ex-dividend date.

SEIU Local 521

401(k) Plan

Notes to Financial Statements

Note 2 – Significant accounting policies (continued)

Benefit payments

Benefit payments are recorded when paid.

Estimates

The preparation of financial statements in conformity with generally accepted accounting principles in the United States of America requires the plan management to make estimates and assumptions that affect certain reported amounts of Plan assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Accordingly, actual results may differ from those estimates.

Subsequent events

Management evaluates events occurring subsequent to December 31, 2009 in determining the accounting for and disclosure of events that affect the financial statements. The Plan has no subsequent events that required recognition or disclosure in the financial statements for the year ended December 31, 2009. Subsequent events were evaluated through September 29, 2010, which is the date the financial statements were available to be issued.

Note 3 – Fair value measurements

Financial Accounting Standards Board (FASB) *Accounting Standards Codification (ASC) 820, Fair Value Measurements and Disclosures*, provides the framework for measuring fair value. That framework provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (level 1 measurements) and the lowest priority to unobservable inputs (level 3 measurements). The three levels of fair value hierarchy under FASB ASC 820 are described as follows.

Level 1 – Inputs to the valuation methodology are unadjusted quoted prices for identical assets or liabilities in active markets that the plan has the ability to access.

Level 2 – Inputs consist of quoted prices in markets that are not active, or inputs that are observable, directly or indirectly. If the asset or liability has a specified (contractual) term, the level 2 input must be observable for substantially the full term of the asset or liability.

Level 3 – Inputs to the evaluation methodology are unobservable and significant to the fair value measurement.

The asset or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques used, need to maximize the use of observable inputs and minimize the use of unobservable inputs.

SEIU Local 521**401(k) Plan**

Notes to Financial Statements

Note 3 - Fair value measurements (continued)

Following is a description of the valuation methodologies used for assets measured at fair value. There have been no changes in the methodologies used at December 31, 2009 and 2008.

Mutual funds and collective trust: Valued at the net asset value (NAV) of shares held by the plan at year end.

Participant loans: Valued at amortized cost, which approximates fair value.

The preceding methods described may produce a fair value calculation that may not be indicative of net realizable value or reflective of future fair values. Furthermore, although the plan believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different fair value measurement at the reporting date.

The following table sets forth, by level, within the fair value hierarchy, the plan's assets at fair value as of December 31, 2009 and 2008:

	Fair Value	Fair Value Measurements Using:	
		Quoted Prices in Active Markets for Identical Assets (Level 1)	Significant Unobservable Inputs (Level 3)
<u>December 31, 2009</u>			
Mutual funds			
Conservative funds	\$ 90,290	\$ 90,290	\$ -
Growth funds	638,312	638,312	-
Income funds	215,801	215,801	-
Other funds	535,380	535,380	-
Total mutual funds	1,479,783	1,479,783	-
Collective trust	268,516	268,516	-
Participant loans	62,879	-	62,879
Total	\$ 1,811,178	\$ 1,748,299	\$ 62,879

SEIU Local 521**401(k) Plan**

Notes to Financial Statements

Note 3 – Fair value measurements (continued)

December 31, 2008	Fair Value	Fair Value Measurements Using:	
		Quoted Prices in Active Markets for Identical Assets (Level 1)	Significant Unobservable Inputs (Level 3)
Mutual funds			
Conservative funds	\$ 54,780	\$ 54,780	\$ -
Growth funds	289,165	289,165	-
Income funds	60,667	60,667	-
Other funds	199,206	199,206	-
Total mutual funds	603,818	603,818	
Collective trust	86,926	86,926	-
Participant loans	40,660	-	40,660
Total	\$ 731,404	\$ 690,744	\$ 40,660

Fair value measurements using significant unobservable inputs (Level 3):

	Participant Loans
Balance, December 31, 2008	\$ 40,660
Total gains or losses (realized and unrealized)	
Included in changes in net assets available for benefits	-
Interest credited	-
Purchases, sales, issuances, and settlements (net)	22,219
Balance, December 31, 2009	\$ 62,879

Note 4 – Information prepared and certified by trustee

The following is a summary of the information included in the accompanying financial statements and supplemental information, which was prepared by or derived from information prepared and furnished to the Plan administrator by the trustee, Wilmington Trust Retirement and Institutional Services Company, for the years ended December 31, 2009 and 2008. The Plan administrator has obtained certification from the trustee that such information is complete and accurate.

	2009	2008
Investments at fair market value:		
Mutual funds	\$ 1,479,783	\$ 603,818
Collective trust	268,516	86,926
Participant loans	62,879	40,660
Total investments	\$ 1,811,178	\$ 731,404

SEIU Local 521**401(k) Plan**

Notes to Financial Statements

Note 4 – Information prepared and certified by trustee (continued)

	<u>2009</u>	<u>2008</u>
Investment income (loss)		
Interest and dividends	\$ 26,875	\$ 2,295
Appreciation (depreciation) in fair value of investments	<u>241,833</u>	<u>(227,590)</u>
Total investment income (loss)	<u>\$ 268,708</u>	<u>\$ (225,295)</u>

Note 5 - Investments

The following presents investments at December 31, 2009 and 2008 that represent 5% or more of the Plan's net assets:

	<u>2009</u>	<u>2008</u>
Mutual funds		
Calvert Social Investment Bond Fund, A	\$ 130,423	\$ **
AIM Conservative Allocation Fund, R	**	54,781
AIM Moderate Allocation Fund, R	265,235	98,484
AIM Growth Allocation Fund, R	307,297	157,974
Oppenheimer Main Street Small Cap Fd, N	106,991	38,874
Fidelity Advisor Diversified Intl Fund, T	194,005	87,428
Collective trust		
Wells Fargo Stable Value Fund, J	268,516	86,926
Participant loans	**	40,660

** Investment did not represent 5% or more of the Plan's net assets.

Net appreciation in fair value

For the year ended December 31, 2009, the Plan's investments (including investments bought, sold and held during the period) appreciated as follows:

Mutual funds	\$ 237,130
Collective trust	<u>4,703</u>
Net depreciation	<u>\$ 241,833</u>

SEIU Local 521

401(k) Plan

Notes to Financial Statements

Note 6 – Income tax status

The Plan document is a Sungard Volume Submitter document with an IRS opinion letter dated October 5, 2001, in which the Internal Revenue Service stated that the Plan as then designed was in compliance with the applicable requirements of the Internal Revenue Code (IRC). Although the Plan has been amended since receiving the opinion letter, the Plan administrator and the Plan's tax counsel believe that the Plan is designed and is currently being operated in compliance with the applicable requirements of the IRC.

Note 7 - Plan termination

Although it has not expressed any intent to do so, the Organization has the right under the Plan to discontinue its contributions at any time and terminate the Plan subject to the provisions of ERISA.

Note 8 - Risks and uncertainties

The Plan invests in various types of investment securities. Investment securities are exposed to various risks, such as interest rate, market and credit risks. Due to the level of risk associated with certain investment securities, it is at least reasonably possible that changes in the values of investment securities will occur in the near term and that such changes could materially affect participants' account balances and the amounts reported in the statement of net assets available for benefits.

Note 9 – Reconciliation of financial statements to Form 5500

The following is a reconciliation of net assets available for benefits per the financial statements to Form 5500 at December 31, 2009 and 2008:

	<u>2009</u>	<u>2008</u>
Net assets available for benefits per the financial statements	\$ 1,815,864	\$ 737,955
Participants' contributions receivable	-	-
Employer contribution receivable	<u>(4,686)</u>	<u>(6,551)</u>
Net assets available for benefits per Form 5500	<u>\$ 1,811,178</u>	<u>\$ 731,404</u>

SEIU Local 521

401(k) Plan

Notes to Financial Statements

Note 9 – Reconciliation of financial statements to Form 5500 (continued)

Following is a reconciliation of employer contributions per the financial statements for the year ended December 31, 2009 to Schedule H of Form 5500:

Employer contributions per the financial statements	\$	195,017
Add: Employer contribution receivable as of December 31, 2008		6,551
Less: Employer contribution receivable as of December 31, 2009		<u>(4,686)</u>
Employer contributions per Schedule H of Form 5500	\$	<u>196,882</u>

Supplemental Information

SEIU Local 521**401(k) Plan**

Schedule H, Line 4i

Schedule of Assets Held for Investment Purposes at Year End

December 31, 2009

EIN 20-8192637

PN 001

(a)	(b)	(c)	(e)
Identity of Issue, Borrower, Lessor, or Similar Party	Description of Investment Including Maturity Date, Rate of Interest, Collateral, Par or Maturity Value	Fair Value	
Wells Fargo Stable Value Fund, J	Collective Trust, 6,263.501 units	\$ 268,516	
Calvert Social Investment Bond Fund, A	Mutual Fund, 8,614.450 units	130,423	
Oppenheimer Strategic Income Fund, N	Mutual Fund, 21,614.714 units	85,378	
AIM Conservative Allocation Fund, R	Mutual Fund, 9,782.284 units	90,290	
AIM Moderate Allocation Fund, R	Mutual Fund, 27,571.246 units	265,235	
AIM Growth Allocation Fund, R	Mutual Fund, 30,791.271 units	307,297	
Oppenheimer Value Fund, N	Mutual Fund, 4,658.236 units	87,761	
Oppenheimer Main Street Growth & Income Fund, N	Mutual Fund, 1,913.781 units	53,127	
Calvert Social Investment Fd Equity Portfolio, A	Mutual Fund, 2,747.530 units	83,882	
Oppenheimer Main Street Small Cap Fd, N	Mutual Fund, 6,633.047 units	106,991	
Fidelity Advisor Ser Diversified Intl Fd, T	Mutual Fund, 13,197.597 units	194,005	
AIM Real Estate Fund, R	Mutual Fund, 4,240.332 units	75,394	
Participant Loans	Interest rates from 4.25% to 9.25%, collateral is vested interest in participant's account and the latest maturity is August 2014.	62,879	
		<u>\$ 1,811,178</u>	

Column (a) is blank because there are no parties-in-interest.

Column (d) has been omitted because all investments are participant directed.

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SEIU Local 521 Executive Board Motion

Motion Number: 09

Date: March 19, 2011

Motion Title: Approval to Reduce the Unfunded Reserves that are Dedicated Set Aside Balance Amounts within the General Fund

Recommended By: The SEIU Local 521 Budget and Finance Committee

Background: For some months now we have been painfully aware that monies set aside for certain savings accounts are no longer available to the General Fund. As previously described certain of our funds which were voted on at Board meetings to be dedicated savings accounts were held in the General Fund and used as "float" to earn more interest and to allow for the vagaries of our cash flow situation. However, during 2010 and late 2009 the money was spent and our revenues did not increase as hoped and budgeted.

As we do not have the money to back these amounts up we wish to show a more accurate picture of our finances and reduce these reserves. As of January 31st the Bank Balance on Saving and Investment Accounts Document #1 of the monthly Financial Reports shows the following:

Unfunded Reserve Name	as of 1/1/11	Reduce to:
Retiree Benefit Trust	\$602,148.16	\$ 500.00
Clarence Dodge Scholarship	\$ 9,631.04	
Capital Reserve	\$ 91,134.23	\$ 10,000.00
Building Fund	\$172,661.53	\$ 10,000.00

Motion: To approve reducing the following Unfunded Reserves that are dedicated set aside balance amounts which are shown as located in the General Fund as follows: the Retiree Benefit Trust – reduce to \$500.00, the Capital Reserve – reduce to \$10,000, and the Building Fund – reduce to \$10,000.

Follow Up:

Moved by: _____ Second : _____

Amendment: _____

Amended By: _____

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

Motion: Carries Fails: Tabled Until: Date:_____

Signatures



Report Backs on Finances

Service Fee Payer Rebates and Open Shops:

16,898 letters went out to service fee payers during December 2010 and early January 2011, informing them what the fair share fee would be for 2011, giving them required information to request a rebate or challenge the chargeable/non-chargeable percentages, and giving them an opportunity to become a member of the union. Approximately 500 of these letters went out to service fee payers paying the fair share fee. The remaining letters went to service fee payers either paying fees equivalent to dues (100%) or fees of 80%, 90% or 95% of equivalent dues.

Approximately 8,000 letters went to Homecare workers in Santa Clara and San Mateo Counties, and approximately 8,325 letters went to workers in our other chapters. The largest numbers of letters sent to those paying more than the fair share fees other than homecare workers went to workers in the following Chapters: 1,565 to Fresno County employees, 1,944 to Kern County employees, 1,548 to Tulare County employees, 1,162 to former Local 535 workers in the San Jose/Santa Clara area, 924 to FASTA, and 486 to Santa Clara COE.

1423 service fee payers requested rebates in 2010 totaling \$380,829.37. The average requested rebate sent out to the 99 homecare workers was \$93.76 for the year, and the average rebate for the remaining 1324 workers from other employers was \$281.05 for the year. There were 715 rebate requests from Fresno County, 201 requests from the former Local 535 employees in the San Jose/Santa Clara area, and 129 requests from Kern County. There were 13 challenges of the audited percentage for chargeable/non-chargeable; 12 from Kern County Air Pollution Control Regional District.

If we had converted the service fee payers who requested 2010 rebates, the Local would have kept the \$380,829.37 plus the costs associated with the service fee notification letters in the general fund. Based on experience the dollar amount saved in 2011 will be roughly the same: about \$100 per converted homecare worker and about \$250 per converted worker from other employers plus associated costs above.

Currently the Local is pursuing Agency Shop campaigns in both Tulare County with 931 non-members and Kings County with 408 non-members. Throughout the Local there are approximately 2539 non-members. These non-members pay nothing to the union even though they are represented. *If we are successful in Tulare County the increase in dues/fees based on the current average member dues of \$26 per month could be \$290,472 per year. If successful in Kings County the increase based on current average member dues of \$36 per month could be \$176,256. A successful Agency Shop campaign in Madera County where average dues of the professional unit are \$66 per month (114 non-members) and the Service Unit \$53 per month (63 non-members) could bring in an additional \$130,356 per year.

*These amounts are prior to applicable per capita payments and are at equivalent dues for service fees.

SEIU Local 521 2010 Rebate Project

Employer	Number of Service Fee Payers	Requested count	Claim %	Rebate in \$\$
City of Bakersfield	76	1	1.32%	\$ 233.08
City of Santa Cruz	52	1	1.92%	\$ 192.02
City of Wasco	7	3	42.86%	\$ 871.22
Community Action - Kern	59	3	5.08%	\$ 336.88
County - Fresno	1,565	715	45.69%	\$ 188,378.78
County - Kern	1,944	129	6.64%	\$ 18,808.37
County - Mariposa	52	22	42.31%	\$ 4,965.37
County - Santa Cruz	115	27	23.48%	\$ 9,447.39
County - Stanislaus	124	16	12.90%	\$ 5,369.08
County - Tulare	1,548	46	2.97%	\$ 13,195.04
Court - Fresno County	38	14	36.84%	\$ 3,111.99
Court - Kings County	3	1	33.33%	\$ 200.07
Court - Santa Clara County	15	2	13.33%	\$ 685.82
Court - Santa Cruz County	1	1	100.00%	\$ 166.13
FASTA	924	10	1.08%	\$ 409.41
Housing Authority - Fresno	31	12	38.71%	\$ 2,472.85
Regional Center-Kern	21	11	52.38%	\$ 2,512.74
Retired Members Chapter (521)	-	15	0.00%	\$ 4,067.19
San Mateo COE	20	16	80.00%	\$ 4,843.05
Santa Clara COE	486	66	13.58%	\$ 20,626.89
Santa Clara County	1,162	208	17.90%	\$ 89,062.08
Santa Cruz Metro - SEA	1	1	100.00%	\$ 276.03
Valley Transportation Authority	7	3	42.86%	\$ 1,191.51
West Valley/Mission CCD	74	1	1.35%	\$ 123.79
SC-IHSS	6,915	94	1.36%	\$ 8,806.56
SM-IHSS	1,159	5	0.43%	\$ 476.03
Grand Total	16,399	1,423		\$ 380,829.37

County	Office	Chapter	%		Members	Service Fee	Non-Mbrs	Contract Type
			to Local	Total				
KER	BFL	CITY OF ARVIN	0.05%	32	32	-		Agency
KER	BFL	CITY OF BAKERSFIELD	1.09%	710	635	75		Agency
FAT	HAN	CITY OF COALINGA	0.05%	33	26	7		Agency
KER	BFL	CITY OF DELANO	0.32%	206	192	14		Agency
SC	SJC	CITY OF EAST PALO ALTO	0.06%	37	28	9		Agency
FAT	HAN	CITY OF EXETER	0.03%	18	17		1	Agency
MRY	SAL	CITY OF GREENFIELD	0.02%	14	13	1		Agency
KER	BFL	CITY OF HANFORD	0.20%	129	105	24		Agency
SB	SAL	CITY OF HOLLISTER	0.06%	41	34	7		Agency
MRY	SAL	CITY OF KINGS	0.02%	15	7	8		Agency
TUL	BFL	CITY OF LINDSAY	0.02%	12	12		-	Agency
SM	SM	CITY OF MENLO PARK	0.56%	366	114	252		Agency
SM	SM	CITY OF MOUNTAIN VIEW	0.25%	165	133	32		Agency
SM	SM	CITY OF PALO ALTO	1.06%	687	465	222		Agency
SM	SM	CITY OF REDWOOD CITY	0.40%	260	244	16		Agency
MRY	SAL	CITY OF SALINAS - Blue Collar Unit	0.10%	63	47	16		Agency
MRY	SAL	CITY OF SALINAS - Crew Supervisors Unit	0.01%	8	7	1		Agency
MRY	SAL	CITY OF SALINAS - SMEA	0.23%	152	54	98		Agency
SM	SM	CITY OF SAN MATEO - Maint	0.11%	69	67	2		Agency
SM	SM	CITY OF SAN MATEO - Part Time Non-Merit Unit	0.27%	178	7	171		Agency
SM	SM	CITY OF SAN MATEO - Library Per Diem Unit	0.08%	53	23	30		Agency
SM	SM	CITY OF SAN MATEO - Library Merit Unit	0.05%	32	25	7		Agency
SCR	SCR	CITY OF SANTA CRUZ	0.67%	435	371	64		Agency
SCR	SCR	CITY OF SANTA CRUZ - Temps	0.46%	299	203	96		Agency
SCR	SCR	CITY OF SCOTTS VALLEY	0.04%	24	24			Agency
KER	BFL	CITY OF SHAFTER	0.12%	76	55		21	open
MRY	SAL	CITY OF SOLEDAD	0.07%	46	42	4		Agency
SC	SJC	CITY OF SUNNYVALE	0.08%	50	42	8		Agency
KER	BFL	CITY OF TAFT	0.02%	16	15		1	open
KER	HAN	CITY OF TULARE	0.28%	183	119	19	45	Agency
KER	BFL	CITY OF WASCO	0.08%	51	47	4		Agency
SCR	SCR	CITY OF WATSONVILLE	0.08%	54	53	1		Agency
FAT	FAT	FRESNO COUNTY	0.00%	-				
FAT	FAT	Unit 3 - Social Services	0.79%	516	333	183		Agency
FAT	FAT	Unit 31 - Public Defenders	0.07%	48	33	15		Agency
FAT	FAT	Unit 36 - Supervisory Employees	0.55%	356	66		290	open
FAT	FAT	Unit 4 - Eligibility Workers	1.09%	708	460	248		Agency
FAT	FAT	Unit 4 - Job Specialists	0.36%	235	139	96		Agency
FAT	FAT	Unit 12 - Clerical & Tech Unit	2.07%	1,344	843	501		Agency
FAT	FAT	Unit 2 - Child Support	0.28%	180	92	88		Agency
FAT	FAT	Unit 2 - Correctional Officers	0.47%	307	285	22		Agency
FAT	FAT	Unit 2 - Corrections (no chapter structure - all others in unit 2)	0.07%	44	37	7		Agency
FAT	FAT	Unit 2 - Juvenile Hall	0.36%	231	208	23		Agency
FAT	FAT	Unit 22 - Paraprofessional & Technical	0.32%	206	150	56		Agency
KER	BFL	KERN COUNTY	0.00%	-				
KER	BFL	1-Supervisory	0.77%	499	278		221	open
KER	BFL	2-Professional	1.42%	919	550	369		Agency
KER	BFL	3-Technical	1.64%	1,066	757	309		Agency
KER	BFL	4-Clerical	1.81%	1,173	765	408		Agency
KER	BFL	5-Administrative	1.20%	781	504	277		Agency
KER	BFL	6-Trades/Craft/Labor	0.94%	612	445	167		Agency
KER	BFL	9-Court Servc unit	0.54%	348	272	76		Agency
KER	BFL	C-Court Service Supervisory	0.05%	32	32		-	Agency
KER	BFL	J-Criminal Justice	0.00%	2	2		-	Agency
KER	BFL	S-Criminal Justice Supervisory	0.00%	-	-		-	Agency
KER	BFL	Kern Water Agency	0.08%	51	26	25		Agency
KER	BFL	SJVAPCD - General Unit	0.35%	225	123	102		Agency
KER	BFL	North Kern Cemetary District	0.01%	4	4		-	Agency
KER	BFL	Grandparent/Non-Members	0.29%	187	187		-	
KIN	HAN	KINGS COUNTY	1.24%	807	399		408	open
MAD	FAT	MADERA COUNTY COMPA	0.27%	178	64		114	open
MAD	FAT	MADERA COUNTY SEMC	0.13%	85	22		63	open
MAR	FAT	MARIPOSA COUNTY	0.37%	238	187	51		Agency
MRY	SAL	MONTEREY COUNTY	0.00%	-				
MRY	SAL	J-General	2.36%	1,534	1,283	251		Agency
MRY	SAL	H-Health	0.53%	344	310	34		Agency

MRY	SAL	F-Supervisory		0.36%	234	193	41		Agency
MRY	SAL	K-Social Service		0.93%	601	569	32		Agency
MRY	SAL	R-Resident Physicians		0.03%	21	15		6	open
SB	SAL	SAN BENITO COUNTY		0.48%	314	164	150		Agency
SM	SM	SAN MATEO COUNTY		0.00%	-				
SM	SM	35-Accounting/Admin		0.47%	307	157	150		Agency
SM	SM	36-Appraisal		0.06%	41	27	14		Agency
SM	SM	37-Office/Technical Svcs		1.56%	1,015	589	426		Agency
SM	SM	38-Engineering		0.02%	11	6	5		Agency
SM	SM	39-Library		0.31%	200	67	133		Agency
SC	SJC	SANTA CLARA COUNTY		0.00%	-				
SC	SJC	1-APT		5.92%	3,847	3,242	605		Agency
SC	SJC	2-Clerical		4.75%	3,081	2,706	375		Agency
SC	SJC	3-Blue Collar		1.71%	1,113	1,019	94		Agency
SC	SJC	5-PHN		0.12%	76	69	7		Agency
SC	SJC	15-EHN		0.09%	57	49	8		Agency
SC	SJC	Super-21		0.33%	212	201	11		Agency
SC	SJC	Worker		1.77%	1,150	1,086	64		Agency
SCR	SCR	SANTA CRUZ COUNTY		0.00%	-				
SCR	SCR	Santa Cruz County		2.34%	1,519	1,468	51		Agency
SCR	SCR	Santa Cruz County Temps		0.73%	474	415	59		Agency
SCR	SCR	Regional Transportation Commission		0.02%	12	12			Agency
STA	FAT	STANISLAUS COUNTY		0.00%	-				
STA	FAT	unit "A"		0.83%	541	417	124		Agency
TUL	VIS	TULARE COUNTY		0.00%	-				
TUL	VIS	unit 1		0.94%	610	166		444	open
TUL	VIS	unit 3		0.65%	421	210	211		Agency
TUL	VIS	unit 4		1.18%	769	393	376		Agency
TUL	VIS	unit 6		0.36%	234	57		177	open
TUL	VIS	unit 7		0.59%	386	76		310	open
STA	FAT	TUOLUMNE COUNTY		0.00%	-				
	FAT	unit		0.18%	119	22		97	open
SM	SM	ADDUS		0.07%	44	42	2		Agency
KER	BFL	BEAR VALLEY		0.05%	35	30		5	open
SM	SM	IHSS SAN MATEO		4.92%	3,192	2,046	1,146		Agency
SC	SJC	IHSS SANTA CLARA		22.17%	14,393	10,017	4,376		Agency
SC	SJC	INSTITUTE ON AGING		0.18%	115	115		-	Closed/Union
SM	SM	PATHWAYS CONTINUOUS CARE		0.19%	126	86	40		Agency
SC	SJC	521 STAFF		0.06%	36	36			(no contract)
SC	SJC	RETIRED MEMBERS		1.45%	941	941		-	(no contract)
SC	SJC	ACHIEVEKIDS		0.16%	101	92	9		Agency
SC	SJC	ALLIANCE FOR COMM CARE / MOMENTUM		0.36%	236	215	21		Agency
SC	SJC	AMERICAN RED CROSS		0.08%	55	48	7		Agency
SB	SAL	CHAMBERLAIN'S CHILDRENS CENTER		0.06%	39	34	5		Closed/Union
KER	BFL	COMMUNITY ACTION KERN		0.63%	409	355	54		Agency
KIN	HAN	COMMUNITY ACTION KINGS		0.25%	163	37		126	open
MAD	FAT	COMMUNITY ACTION PART MADERA		0.18%	114	94	20		Agency
SCR	SCR	COMMUNITY BRIDGES		0.20%	128	113	15		Agency
SC	SJC	COMMUNITY SOLUTIONS		0.20%	128	109	19		Closed/Union
SC	SJC	GARDNER FAMILY HEALTH CTR		0.18%	120	119	1		Agency
FAT	FAT	GOLDEN VALLEY HEALTH CTR		0.65%	425	419	6		Agency
SC	SJC	HOPE REHABILITATION		0.41%	264	120	144		Agency
SC	SJC	HUMANE SOCIETY		0.08%	49	15	34		Agency
SC	SJC	MACSA		0.06%	39	39			Closed/Union
MRY	SAL	MAOF / Center Base Unit & Admin Unit		0.08%	55	55			Closed/Union
SM	SM	PENINSULA JEWISH COMM CTR		0.09%	61	61			Closed/Union
SC	SJC	REBEKAH		0.14%	90	90			Closed/Union
SCR	SCR	SALUD PARA LA GENTE INC.		0.23%	149	149			Closed/Union
SCR	SCR	SANTA CRUZ COMM COUNSELING		0.16%	105	93	12		Agency
SC	SJC	STARLIGHT		0.10%	66	66			Closed/Union
FAT	VIS	STUDENT TRANSPORTATION		0.06%	38	38			Closed/Union
SCR	SCR	WOMEN'S CRISIS SUPPORT		0.03%	18	18			Closed/Union
SC	SJC	CAMPBELL-UHSD		0.16%	103	95	8		Agency
SC	SJC	CUPERTINO SD / Bus Drivers		0.29%	189	156	33		Agency
KER	BFL	EDISON ELEMENTARY		0.12%	77	28		49	open
FAT	FAT	FASTA		1.80%	1,170	269	901		Agency
FAT	FAT	FRESNO UNIFIED SCHOOL		0.91%	592	504	88		Agency
MRY	SAL	GONZALES UNIFIED SCH DIST		0.01%	5	5			Agency
FAT	FAT	FIRST STUDENT (LAIDLAW)		0.41%	263	263		-	Closed

SC	SJC	MORGAN HILL USD	0.48%	314	301	13		Agency
SC	SJC	ORCHARD SD	0.04%	29	29		-	Agency
FAT	FAT	RIVERDALE UNIFIED	0.09%	57	50	7		Agency
STA	FAT	SALIDA UNION SCHOOL	0.06%	39	35	4		Agency
SCR	SCR	SAN LORENZO VALLEY	0.16%	107	107			Agency
SM	SM	SAN MATEO COE	0.12%	75	55	20		Agency
SC	SJC	SANTA CLARA COE	2.26%	1,468	976	492		Agency
KER	BFL	STANDARD SCHOOL	0.22%	144	51		93	open
KER	BFL	TAFT UNION HIGH SCHOOL DIST	0.15%	100	45		55	open
SC	SJC	WEST VALLEY / Mission CCD	0.44%	288	217	71		Agency
KER	BFL	ARVIN-EDISON WATER STORAGE DIST	0.02%	10	7	3		Agency
FAT	FAT	CENTRAL CA LEGAL SERVICES	0.07%	45	45		-	Closed/Union
MRY	SAL	CHISPA HOUSING MANAGEMENT	0.04%	26	26			Closed/Union
FAT	FAT	Court - Fresno Unit 6	0.41%	269	203	66		Agency
FAT	FAT	Court - Fresno Unit 15 Court Professional	0.09%	56	54	2		Agency
KIN	HAN	COURT - KINGS COUNTY	0.10%	62	59	3		Agency
MAR	FAT	COURT - MARIPOSA	0.01%	7	5	2		Agency
MRY	SAL	COURT - MONTEREY	0.21%	135	91	44		Agency
MRY	SAL	COURT - MONTEREY SUPERVISORY UNIT	0.01%	7	7			Agency
SB	SAL	COURT - SAN BENITO GENERAL UNIT	0.04%	26	13	13		Agency
SM	SM	COURT - SAN MATEO	0.34%	224	162	62		Agency
SC	SJC	COURT - SANTA CLARA	0.91%	591	577	14		Agency
SCR	SCR	COURT - SANTA CRUZ GENERAL UNIT	0.14%	90	89	1		Agency
TUL	VIS	COURT - TULARE COURT REPORTERS	0.03%	20	20		-	Agency
TUL	VIS	COURT - TULARE GENERAL UNIT	0.24%	157	144	13		Agency
TUL	VIS	COURT - TULARE PROFESSIONAL UNIT	0.02%	12	11	1		Agency
FAT	FAT	HOUSING AUTHORITY - FAT	0.22%	142	107	35		Agency
MRY	SAL	HOUSING AUTHORITY - MONTEREY	0.10%	66	66			Agency
SC	SJC	HOUSING AUTHORITY - SCCO	0.22%	140	117	23		Agency
KER	BFL	KERN REGIONAL CENTER	0.25%	162	142	20		Agency
SC	SJC	LAW FOUNDATION	0.08%	53	52	1		Agency
TUL	VIS	LINDSAY STRATHMORE IRRIGATION	0.00%	2	2		-	open
MRY	SAL	MONTEREY BAY UNIFIED AIR POLLUTION CONTROL DIS	0.04%	26	26			Agency
MRY	SAL	MV PUBLIC TRANSPORTATION - Hollister	0.02%	16	16			Closed/Union
MRY	SAL	MV PUBLIC TRANSPORTATION - Salinas	0.12%	81	81			Closed/Union
SC	SJC	SAN ANDREAS REG CTR	0.35%	225	213	12		Agency
SB	SAL	SAN BENITO CO WATER DISTRICT	0.02%	12	12			open
SCR	SCR	SANTA CRUZ METRO TRANSIT DIST	0.00%	-				
SCR	SCR	PSA	0.03%	19	18		1	open
SCR	SCR	SEA	0.08%	51	50	1		Agency
SCR	SCR	VMU	0.03%	19	19			Agency
SCR	SCR	SOQUEL CREEK WATER DISTRICT	0.04%	23	12		11	open
SC	SJC	VTA	0.40%	258	249	9		Agency
SCR	SJC	Young Women Christian Assoc.	0.02%	13	13			Closed/Union
		TOTAL	100.00%	64,930	47,087	15,305	2,538	

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SEIU Local 521

ASIAN PACIFIC AMERICAN LABOR ALLIANCE
Santa Clara, San Mateo, and Fresno Counties

Report to the Executive Board

March 2011

Disseminated and discussed the Governor's Budget Proposal with all members and their families to gain support of the budget plan for this coming special election in June through a balanced combination of cuts and maintaining existing services to the city, county and state level.

Discussed volunteer contributions to the SEIU Committee On Political Education to help make the elected officials stand up for the working people like WE!!!

Process of electing of new officers for the APALA at Santa Clara County, San Mateo County, and Fresno County

Preparing for the Cesar Chavez events to be held in San Jose and Delano areas.

Putting together the APALA Heritage Event on May 21, 2011, Saturday, at San Jose SEIU521 office.

Preparing lists of members that will attend the National APALA convention in Oakland, California this coming June 2011.

Members proposed to donate money or clothes to the victim of earthquake & tsunami in Japan. Also, members proposed to donate money to RECALL Wisconsin Republican's CULPRIT overriding the Labor union rights!!!

Submitted by:

Luis Aguilar laguilar.apala@gmail.com or 408 – 561 - 2423
SEIU Local 521 APALA chair

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AFRAM IS A NATIONAL CAUCUS FOR SEIU
MEMBERS
AND STAFF OF AFRICAN DESCENT



TO: SEIU 521 Executive Board

FROM: Ouida Lewis
SEIU 521 AFRAM

SUBJECT: Caucus Report

DATE: March 8, 2011

On Sunday, February 27, 2011, the Fresno Chapter of AFRAM held their Black History Celebration at Unity Hall in Fresno, CA. Their guest speaker was Chris Finley, Mathematics Instructor at Edison High School. Also in attendance were the winners of the Black History Essay Contest.

The San Jose/San Mateo Chapter of AFRAM held its Black History Celebration at History Park in San Jose, CA on Saturday, February 12, 2011. AFRAM and the Persons With Disabilities Caucus worked jointly to supply food. Brother Henry Gage, one of the last Buffalo Soldiers, was present for the celebration.

The weekend of April 9-10, 2011 is the date for AFRAM's overnight casino bus trip to Reno, Nevada. The bus will leave from San Jose, CA for Cal Neva Hotel & Casino. After spending the night at the Sands Regency Casino & Hotel, everyone leaves for Boomtown before departing for the Bay Area. Information can be obtained from any AFRAM member.

The National AFRAM caucus will convene in Weston, Florida for its National Convention being held April 29 – May 1, 2011. AFRAM delegates representing 521 will be Gwyn Harshaw, Alysia Bonner, Franz Creaga, James Charles, Jamina Hackett and Marilyn DeRouen.

Thank You.

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SEIU LOCAL 521 LATINO CAUCUS REPORT TO EXECUTIVE BOARD



Date: 3/8/2011

**Santa Clara County Chapter: San Jose Office First Quarter Report
Meeting Date: Second Saturday of every Month**

- List of Activities/Events

3/1/11 Members of the Latino Caucus attended a "Downtown" Rally in support of the Wisconsin workers and their struggle to preserve collective bargaining.

- New Members

Five new members recruited

- Current community collaboration work

Ray attended SVAIR meeting on immigration issues

Members participated in the planning meetings in preparation for the upcoming Mexica New Year Event on 3/12 and 3/13. Community Educational workshops will be held on the 3/14, 3/15, 3/17, and 3/18 in the San Jose Union Office.

2/24 and 3/3 members met to plan the Cesar Chavez Event scheduled for 3/27 in the San Jose Union Office.

Planning also underway for Cesar Chavez events in Redwood City.

Planning Joint collaborative meeting with Sister SEIU Local 1021 Latino Caucus planned for 5/14 in San Francisco

San Mateo County Chapter: _____ Meeting Date _____

- List of Activities/Events

- New Members

- Current community collaboration work

**Fresno Chapter: _____ Meeting Date 2/7 and
3/7 _____**

- List of Activities/Events

2/28/11 Donation presentation to Marjorie Mason Center working to eliminate domestic violence. The event was attended by LC members Sergio Garcia, Jennifer Jensen, Brenda Flores, Lorenzo Lambaren and staff Diana Vasquez.

Planning for the Cesar Chavez Event completed. The event will be held on 3/26/2011. Cesar Chavez Contest winners to be announced at the event.

3/4/11 Presentation of donation to the Community Food Bank. The event was attended by Sergio Garcia, Frances Coronado, and Lorenzo Lambaren.

13 individuals attended the 3/7 meeting. Informed members of the upcoming APALA and AFRAM events

- New Members

3 new members

SEIU LOCAL 521 LATINO CAUCUS REPORT TO EXECUTIVE BOARD

- Current community collaboration work

1/11 MLK events, community breakfast, garlanding ceremony, MLK March, Funding MLK events in Fresno and San Jose [ticket purchase]
Planning Latino Caucus meeting in San Francisco with Local 1021 on May 14, 2011
Representing SEIU Local 521 Fresno Latino Caucus, Brenda Flores and Lorenzo Lambaren attended a Meet and Greet event on 2/25/11 for Assemblyman Henry T. Perea and Senator Michael Rubio in collaboration with SEIU Local 1000 and local community groups. Asked local elected officials what their perspectives on the current State Budget and impact on SEIU members.

Visalia Chapter: _____

Meeting Date _____

- List of Activities/Events

- New Members

- Current community collaboration work

Bakersfield Chapter: _____

Meeting Date _____

- List of Activities/Events

- New Members

- Current community collaboration work



SEIU 521 Communications Committee * March 2011 report *

To: SEIU 521 Executive Board
Fr: Wanda Wallace, Chairperson

The 521 Localwide Communications Committee did not meet in March, with members instead opting to conduct work via email.

The group's next meeting: April 6.

Continuing business: Setting up SEIU 521 "Food for All Drive" to kick off in April, culminating by 5-21. The canned food drive will be localwide. It is a joint project with the Good and Welfare Committee.

Its purpose: Help working families during tough economic times and present to the public/media a positive image of Union workers who live in communities and care about our communities.

Individuals or "teams" can compete to see which ones donate the most tonnage of food to a local food bank. The Food Drive will kick off mid-April and run four weeks, ending just before MAY 21. We will hold various media events, in conjunction with food banks, to announce results of our efforts.

Fight for a Fair Economy will be a theme to weave into campaign.

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Nurse Alliance Meeting
March 1, 2011, Local 1021 San Francisco

Attended by Carmen Morales, RN, FNP, KMC; Regina Kane, RN, Mental Health and Kern County Chapter President; Jeff Rockholdt, KMC; Olga Desai, Local 1000 and Ernest Harris, 521 Staff.

Plans for future SEIU Nurse Alliance Conferences;
Public Health Nurse Conference – April 15, San Francisco, Local 1021
Annual Legislative Conference – May 2, 3, 4, Sacramento
Focusing on violence in the workplace, safe patient handling. Structure, breakout sessions and speakers discussed.

Calif. State Legislature Bills pending discussed and SEIU staff lobbyists and political organizers efforts to keep us informed—Debra Roth and Simeon Gant. Legislative Info: www.leginfo.ca.gov
Specific bills discussed: AB 1136- OSHA requirement posting employee injury form 300 annually from Feb. 1-March 30 at all hospitals. Check with your hospital to be sure it is posted.

Assembly member Leland Yee proposed bill to fine hospitals found in violation of nurse-patient ratios.

AB 1083 Perez – Hospital Safety assessments, workplace violence incidents.

AB 30 Hayashi – Hospital Safety, workplace violence, no retaliation for reporting, holding hospitals more accountable than AB 1083.

SB 60 Evans – Marker to meet into deadline – intending for legislation to address worker and patient safety in state hospitals under jurisdiction of state dept. of mental health.

School districts not providing on site school nurses which violates the Nurse Practice Act by allowing untrained personnel to administer medications. Education code mandates safe learning environment for students...therefore we ask, where are the school nurses?

Involving Union from individual to the elected member representatives to political and communication staff to increase awareness of conservative office holders in allegations that public employees are the cause of budget deficits and fiscal crises. The need to acquire data, talking points that elected officials have actually mismanaged government funds through misappropriations (oil, farm subsidies; practices that favor corporations over middle class working families).

Committees were reviewed and additional members joined. Nurse Alliance list of websites given out as well as information/applications for
Upcoming Nurse Conferences.

Here are some links whereas you can get info, updates and feedback on many worker/nurse issues.

NA of CA:

www.nurseallianceca.org

register for SEIU email updates:

<http://www.seiu.org/splash/>

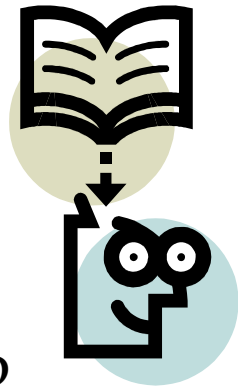
main website for SEIU:

www.seiu.org

National Nurse Alliance:

<http://www.seiu.org/division/healthcare/nurse-alliance/>

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PWD

People Working With Disabilities & IHSS fighting as one.

SEIU 521 Executive Board & Caucus Report

March. 19 2011

Brothers & Sisters

Since we last met, we elected and signed into Office a new Governor.

I continue to believe he is more acceptable than his competitor. The lesser of two evils.

Though he may not be advocating the elimination of IHSS he is advocating its devastation. SEIU is working hard with coalition partners to find alternatives to the governors cuts in his budget to disability communities and seniors that are horrific. Advocates have been flooding the state capitol since January protesting outside and at those few open sessions. Sessions on the Budget are now closed to the voices of the Disability Community. Backroom meetings, Advocates report, are covertly being held providing perks for billionaires, corporations and millionaires.

Coalition partners are asking that members call into their legislators, Assembly and Senate, if you cannot go to the state capitol. Call to tell your legislative member not to support the IHSS Cuts. If you have family & friends that are Republicans show them they are also victims and need to protest.

I advocate on State Coalition calls, I participate as your voice, for local rallies to be held at all the local state offices throughout this budget hearing process. Sacramento folks will continue the vigils at the State Building and throughout the rest of the state all local coalition groups host and advocate daily robust (non-violent) protest at their local state buildings. We the workers, organizers and consumers must be visible during this dangerous budget event. We will not be invisible or quiet as government attempts to rolls over us.

Poor information has been shared at 521 on our situation yet participating on the various state coalition calls I am informed that SEIU is working hard with coalition partners to find solutions. The lobbyist opinion is: regardless of what is done it is not enough to

CA-History-Women of Color In San Jose
“A Conversation On Women And Career Goals”
We Stand Beside All Women and Their Families.

San Jose State University Africana Advisory Board &
SEIU Local 521 People Working With Disabilities (PWD)
Presents: **Dr. Florene Stewart Poyadue**
Founder, Parents Helping Parents, Inc.

Topic: **“WHAT’S A MOTHER TO DO???”**

Where: Africana Cultural Heritage Center SJSU/MLK Library Room 525
When: March 30th, 2011
Time: 4 -- 6PM

How complicated is it for parents to juggle family and career goals?
Students, come and share your efforts to blend in quality child rearing and work load.
Participate in open conversation with Dr. Poyadue on her history of helping parents, and
learn what resources are available, *especially your own inner power of one*, that can
assist you in reaching your goals effectively and satisfactorily..

The founding of the civic pueblo of San Jose in 1777 included five Mulatto families who were the first settlers in this small settlement. During the period of 1777 through 1849, there were small groups of African Americans who came to San Jose. Early census records indicate that they were farmers, barbers, stablemen, domestics, laborers and ministers.

California became an early battleground over human rights. In 1846 Mary, a Missouri slave, sued for liberty in a Mexican court in San Jose and won. During Gold Rush days other enslaved people, often assisted by white attorneys, took their masters to court or tried to flee to Canada. Slave Biddy Mason reached California the hard way: she walked all the way from Mississippi in charge of her owner's livestock. Aided by a white Los Angeles sheriff, she served her master with a writ of habeas corpus and after two days in court was granted liberty for herself and her three daughters. A successful midwife, she invested wisely in Los Angeles real estate, and became a noted philanthropist.

For over a quarter of a century Peter Williams Cassey and Annie Besent Cassey embodied the Good News for African American, Mexican, Native American and Chinese in San Jose and stirred the hearts of the white clergy and members of this parish family who supported his efforts. It is to their honor that this day is dedicated.

The contributions of Peter and Annie to this parish and San José are many. The two of them were founding members of Trinity.[2] They lived on the edge of town in a home on a property they leased. **The “edge of town” in 1860 was between 4th and 5th Streets bordered by Williams and San Salvador[3]. The “boonies” or the Reed Reservation started where 5th street ended at William St.** In the late 1850s Peter and Annie had started an informal school or tutoring program in their home for African American, as well as some Mexican, Native American and Chinese children who were denied by law access to attending public school.[4] African American colleagues of Peter from his San Francisco days joined him **in 1861 to found the Phoenixonian Institute, a residential secondary school, the first such school for African American students west of the Mississippi River.[5] Thirty-two boarding students were admitted annually and some came from as far away at Panama and Oregon.**

counter the severity of the proposed cuts to IHSS and Community Access partners. In light of the backroom bargains for the 1% have too much and corporations, like the nursing homes being provided a 2.6% bonus prior to the 10% across the board cuts resulting in a 7.4% real cut for those agencies and not 10% that disability non-profits would be meted out. Also reports that Billionaires, corporations and Millionaires will receive tax breaks, including Oil companies and Banks who caused this economic down turn. This is not an acceptable situation.

Please turn out to any local protest in your city, call daily your legislators and encourage friends and family to join you. Even our legislative friends are appearing to turn their back on their disability residents buying the message of conservative Government. This is an assault on working people and low income people. This is destroying our middle class. Since most people in the middle class are people of color this is a national class and race action by legislative members on behalf of the very rich.

I have a minor in economics and BA in Psychology. It is the working people that shop at stores and buy services. The rich shop in Europe and businesses such as Wal-mart manufacture in china and sell American working people low quality product's, that many times are physically dangerous: ie. lead paint. The rich don't shop at Wal-mart and neither should you. Working People are losing their homes to bad mortgage loans and those banks that made them are not paying the price; government workers and disability community members are paying the price. Corporations have moved to China, Korea, India, Taiwan, Mexico & South America for cheap labor, they are receiving tax breaks from their legislative friends and American union workers are paying the cost for allowing them to leave America. Labor in America is 12% in Europe it is 60 -78%. Swine flu, from Smith pig farms, in Mexico, destruction of the Amazon for lumber and oil; killing thousands of people in those countries without any significant consequences to those corporations.

This is all connected. Don't stick your head in the sand thinking it will get better; you must stand up and do it now around IHSS and the assault on good union jobs for working people. Stand up against the corporate and legislative assault on our Seniors and disabled communities. Also the assault on workers pensions, yet not fair tax for corporations or rich?

This months report is joint, as both, IHSS & PWD are in this fight. I sit as commissioner on IHSS for Public Authority and PWD members are working actively in their community to educate and inform community groups on Consumer & Worker issues. We are meeting across locals and collaborating together as union and community, to fight. **YOU MUST STAND UP AND BE COUNTED NOW!!!** We need your support.

Blessings

Sis Ellen Rollins, SEIU 521 IHSS Region 6VP

Chapter Chair People Working With Disabilities

erolltweety@yahoo.com

ADMIN / BUILDING REPORT

By: Pam Rodgers, Admin Director
March 2011

1. **Salinas Office:** We completed the cleanup effort in the Salinas office. We were able to maximize the space by removing all the old and broken furniture that was in the back and creating a new meeting space. Our facilities team improved the lighting by replacing all burned out lights.
2. **Hollister Office:** We have given notice to the landlord and have signed a new lease at 449 San Benito Street – Hollister. Although the space is smaller, the local will be saving \$ 650 per month on rent. The Hollister Library has a meeting room that seats 47 and is free of charge we just have to reserve the space. We also located meeting space at the YMCA and Hollister Rec Center that has a fee of \$ 35 per hour.
3. **Santa Cruz Office:** The lease for Santa Cruz will expire June 30, 2011. There is a 90 day clause with an option to renew. We currently pay \$ 5170 per month and have 3189 sq. ft. of office space which is \$ 1.62 psf. We will begin looking at comps and compare our current rent to comparables within the area.

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March Organizing Report

By: Catherine Balbas

New Organizing

External organizers have begun having conversations with workers at our 2011/2012 organizing targets. We are currently working on a blitz on these targets that our organizers and organizers from Locals 721, 99, and 1021 as well as NOC's are participating in.

National Organizing Corps

Robin Goka continues to recruit and train members to the National Organizing Corps. Since our last report, she has trained new NOC's from both Fresno County and Golden Valley Health Centers. Additionally, NOC's have participated in campaigns in the City of Tulare and on new organizing campaigns in the local.

The NOC's who have participated this month are Roy Harris, Greg Gomez, Gwyn Harshaw, Lydia Vallejo, Ruben Aguilar, Cynthia Howard, Henry Ildefonso, Karen Nakatani, and Donna Nielson.

Tulare County

External organizer Sue Madaus is working with internal organizers in Tulare County to increase membership, develop leadership, increase political involvement and activity through COPE, and prepare for the upcoming contract negotiations. Local 521 represents 2600 workers in Tulare County and had open shops in three of the five bargaining units. Organizers have recruited 31 members to the contract action team and have recruited 69 new members.

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Report to the Executive Board from Education and Training Director:

March 7, 2011

Staff Training:

Seven Internal Organizers from five separate L521 offices attended Collective Bargaining training for the week of February 28 – March 4. Organizers worked together in learning the nuts and bolts of contract campaigns and bargaining; from planning calendars for bargaining, developing table strategy, writing proposals and contract language to mock bargaining scenarios.

Fight for a Fair Economy/Pension Training:

L521 senior program staff attended the SEIU three-day, Washington DC, conference on the Fight for a Fair Economy in preparation for the March 25-28 Member Leadership and Action Conference and the implementation of the FFE program in all SEIU locals.

Directly following the FFE conference, some senior staff and members of the local's pension committee attended a one-day IU meeting on pensions.

The information brought back from these meetings will go into the planning for these programs and training of staff and bargaining team members.

Member Leadership and Action Conference (MLAC):

Representatives from Local 521 to the International Member Leadership and Action Conference have been selected. From among fifty-seven applicants, twenty-two were chosen, representing each of the local's regions. These members will travel with a small number of staff to Los Angeles, March 25 – 28, to begin the work of implementing the Fight for a Fair Economy. These members will receive training at the MLAC event and will bring that back to each of their regions. Membersleaders are an integral part (the most important part!) of this very important program and will bring back commitments to training other members and moving this program throughout the local and into the community.

Monthly Staff Leads Team Meetings:

We have convened regular monthly meetings of our staff leads to build a stronger team of lead staff for the Local because they are so widely spread out throughout the Local. The purpose of these monthly leads meetings is to determine developmental needs of our lead staff and provide training; to share information helpful in their day to day work; to coordinate localwide activities; and to debrief campaigns where they can learn from each other. This group of leads made up of internal worksite organizers, research organizers, and contract enforcement specialists is the next line of staff leaders who will eventually become staff directors.

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March 2011 COMMUNICATIONS REPORT

by Khanh T. Weinberg – Communications Director

Contract Campaigns

Kern County – Members passed a strike authorization vote on Jan. 22. Garnering much media interest, from print and television.

- Assisting in creation of signs for weekly rallies. Getting media out and directing to bargaining team members at those rallies.
- Edited and helped get printed a letter to the editor by Dutch Kooren in the Bakersfield Californian.

CA budget and Fair Economy

IHSS and Santa Clara County – About 70 members jointly staged a “Fair Budget, Fair Economy” rally on March 3 in San Jose in front of the state building. Communications prepared talking points and drafted speeches, pitching to media the idea that a fair economy is one that stops attacking working families. Coincidentally, on the same day as the rally, Anthem Blue Cross announced insurance rates would increase by 40%. We worked with KTVU Channel 2 reporter to connect the dots. . . that making insurance affordable for middle-class families was a “fair economy” issue. News clip can be seen at: www.ktvu.org

Pension fight-back in the media

Fresno and Kern counties: Citing quasi-credible study, local media (Fresno Bee and KGET TV) report that Fresno County’s pension benefits are the costliest in the state, with Kern at No. 2. We’ve prepared a rebuttal piece, authored by James Hackett, to be submitted to Fresno Bee. [news clips attached]

Pension stock article: See attached March article; continuing to inform/educate members on pension factoids.

Online Media: www.seiu521.org, Facebook, etc

CA budget: Launched new web page to promote the CA budget campaign; using budget to recruit more members to sign up for email. So far, gathered 51 new email addresses.

Santa Clara County Court: Created slideshow for the Santa Clara Court featuring cards written by members expressing what cuts would mean to employees and their families. <http://www.flickr.com/photos/37177629@N06/sets/72157625845250847/show/>

Facebook/Twitter: Continuing usage of both to get out to membership updates regarding Wisconsin and our solidarity rallies.

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HOLLISTER FREE LANCE

Union mass convinces board to put off job cuts

Feb 23, 2011

By Connor Ramey

Dozens of members from the Service Employees International Union flocked to the board of supervisors meeting Tuesday, hoping to gather support from the five officials on two separate issues.

The SEIU succeeded in postponing the elimination of three jail workers for another week, despite those cuts being scheduled - and previously postponed - during the county's budget hearings in August. One of the supervisors in particular, Jaime De La Cruz, stood staunchly in support of sustaining the positions and preventing any cuts.

The union also tried to gather support to prevent proposed cuts to home healthcare workers, but that wasn't on the agenda.

As for what was on the agenda, the San Benito County Sheriff's Office was proposing to cut three jail workers to fill its budget shortfall of more than \$286,000. The cuts originally were proposed by the then County Administrative Officer Susan Thompson to the former sheriff, Curtis Hill. The sheriff had asked for more time to find additional funding for the position. In December, he announced he couldn't find the funding but didn't eliminate the position.

The proposed elimination of two correctional officers and one inmate program manager at the county jail brought support from a large contingent of the local SEIU branch - including local branch representative Lewis Myers. Jail workers and correctional officers described the elimination significant, threatening their personal



San Benito County workers held a protest in the afternoon Feb. 15, a week before the latest board meeting, to show their displeasure about the current situations.

Photo by: Nick Lovejoy, Staff Photographer



The picketers were out Feb. 15.

Photo by: Nick Lovejoy, Staff Photographer

safety while working.

If the cuts weren't made soon, the deficit could grow by more than \$400,000 by the end of the fiscal year, County Administrative Officer Richard Inman warned.

If the cuts were not made, it would affect the following year's budget and almost entirely eliminate the county's reserves in case of an emergency, Inman said.

"If something isn't done it is not going to leave the county with enough reserves to protect itself in case of an emergency," Inman said.

De La Cruz said the county should hold off on the cuts until the end of the fiscal year and worry about them later - and his response received applause from the SEIU members.

De La Cruz also wanted members of the board to visit the jail to see what they are threatening to cut.

"The dollars have been spent, and that is a fixed cost that we can't do anything about," De La Cruz said. "We are still going to be in the negative so let it go."

An emotional sheriff Lt. Edward Escamilla said the jail is already understaffed, with around four guards on the jail floor at a time, and contended that a reduction in staff could mean more overtime hours and less inmate capacity.

"They put their life on the line every day," he said. "We are still afloat, but if we start cutting our officers, the ship is going to start sinking."

Sheriff Darren Thompson said that with the cuts, the jail would "not be able to provide the same services to inmates."

Thompson could not find other alternative methods to fund the positions after the former sheriff's attempts failed, he said.

The board held off on the cuts after Myers said the members would be willing to take possible cuts from pay and benefits - if the board looked into administrative costs as well. Myers also called for an independent audit of the county's budget to determine where money is going.

"We are open to everything," Myers said.

The board will discuss the cuts at the next board meeting March 1. Members of the board's budget committee will discuss the cuts on Friday.

Supervisor Anthony Botelho believes something has to be done soon.

"It's gotten to be really scary for us right now," Botelho said.

Other proposed reductions included state cuts to homecare workers threatening 30 percent of jobs in the county, SEIU representative Eric Larson proclaimed.

SEIU members representing the homecare workers turned in more than 600 cards signed by local residents in support of the homecare workers.

A cut in the program would affect the elderly and the county dramatically, Larson said. The projected cuts are expected to take place in July.

Last week, members of the SEIU protested outside the board chambers to try and "bring awareness to the community," Supervisor Robert Rivas said, who went out and met the SEIU members to exchange contact information.

SEIU members were calling for an audit of the county's budget, Rivas said.

Myers, who ran the protest, did not return phone calls before press time.

Connor Ramey

Connor Ramey is a staff writer for the Free Lance. You can reach him by [email](#) or at (831) 637-5566.

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Fresno County libraries may lay off staff, cut hours

Posted at 11:13 PM on Tuesday, Feb. 15, 2011

By Kurtis Alexander / The Fresno Bee

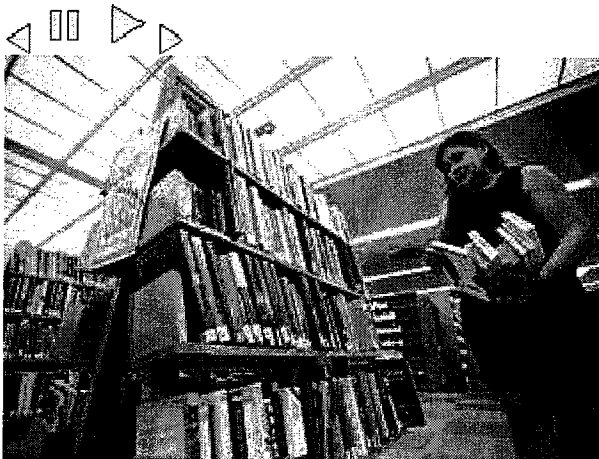
The past decade has been kind to Fresno County libraries.

Library officials have opened seven new libraries, turned old reading rooms into computer labs and Internet stations and even introduced e-books to the collections.

The progress, however, may soon slow. The sputtering economy is catching up with the 34-branch Fresno County Public Library system and, in a major cost-cutting effort, officials are looking to put new construction on hold, reduce hours, and for the first time in recent memory, lay off staff.

"We do need to make some savings," said county librarian Laurel Prysiazny, who is in her first year at the helm of the county library system. "We can't continue to keep expenditures where they're at, given our revenues."

A "restructuring plan" that Prysiazny intends to give the Board of Supervisors next month isn't finished, so details of her cost-cutting strategy remain uncertain. But Prysiazny says she will make cuts as invisible to the public as possible. She also says there are ways to improve services through efficiencies.



CRAIG KOHLRUSS / THE FRESNO BEE

Library worker Marcela Archuleta puts books out for sale at the Central Library branch Monday in downtown Fresno. The Central Library is expecting to have reduced hours to save money.

Several challenges await, however.

Nearly 80 part-time temporary library employees were recently let go and an untold number of the roughly 280 full-time workers will be laid off in coming months due to sagging library revenues, Prysiazny says.

Meanwhile, library use only grows as patrons check out more books, participate in more programs and spend more time at computers -- many using libraries as de facto job centers as they try to weather the tough economy.

The system counts about 275,000 card-carriers, and patrons on average are checking out more than they did three years ago, library data show.

Union officials, who plan to protest the layoffs, say losing library staff and their expertise will inevitably hurt service.

For years, the county library system has been largely immune to cutbacks seen in other public programs. A 1999 voter-approved sales tax, Measure B, assured libraries their own, secure pot of funds.

But declining sales tax revenues have begun to show on the balance sheets. So have declining property tax revenues, part of which are dedicated to libraries. Together, the two taxes make up nearly 90% of the system's roughly \$24 million annual budget. In the past three years, those revenues have fallen 13%.

The governor's budget proposal presents another potential pitfall. According to county estimates, local libraries stand to lose \$725,000 in state funds, much of it funding a partnership that allows Fresno County to share materials with nine other library systems in the Central Valley.

Without that funding, Prysiazny says, county libraries will likely start charging patrons who use materials from outside the system.

'A shame' to cut hours

In another likely cost-savings move, the Central Library in downtown Fresno will see its evening hours scaled back, Prysiazny says. Attendance at night is sparse, she explains.

But that plan doesn't sit well with everyone.

"This is one of the only libraries open late," said Linda Carrillo, who lives near Central Library and sometimes is there until its 9 p.m. closing time to do her homework from Fresno City College. "It'd be a shame to see hours cut."

No libraries will be closed, Prysiazny says, and few, if any other, libraries will see reduced hours under her pending plan. The bulk of the saving, she explains, will come by shifting employee workloads and locations.

"Libraries 10 years ago required more intervention from a librarian. People are a lot more empowered and information-savvy today," she said.

The biggest threat to the library system will come next year, when voters are expected to decide whether to extend Measure B. The sales tax measure sunsets in 2013.

"I can't imagine how the public would deal with [losing Measure B] when they're so actively utilizing library services," said Nancy Kast, president of Friends of the Fresno County Public Library.

Kast says her biggest priority is making sure Measure B continues.

Fewer hardships here

Library systems like Fresno County's that have taxes dedicated to their operations have made out much better in recent years than library systems that rely more heavily on city, county or state funding.

"When times are tough, often library services will be cut to fund other services," said Danis Kreimeier, librarian for Napa City-County Library and former president of the California Library Association. "Having dedicated funds helps provide stability."

Fresno County Supervisor Phil Larson, whose district has seen several new libraries built in recent years, hasn't heard the details of Prysiazny's restructuring plan. But he doesn't expect to see the hardships here that library systems elsewhere have faced.

"We've been fortunate so far," he said. "The people in Fresno have been pretty generous with the libraries."

The reporter can be reached at kalexander@fresnobee.com or (559) 441-6679.

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Fresno County pensions costliest in state

Posted at 10:13 PM on Saturday, Feb. 26, 2011

By Kurtis Alexander / The Fresno Bee

For every dollar Fresno County spends on pay, it will spend another 53 cents on pensions in the next budget year, making the retirement system here the most expensive among 20 county-run systems in the state, a new survey finds.

And despite efforts to rein in costs, Fresno County is unlikely to see its pension bill shrink for 15 years, a county-commissioned study says.

"People used to joke that General Motors was a pension plan that also makes automobiles. Maybe it will soon be that Fresno [County] is a pension plan that provides limited services," said Joe Nation, a professor of public policy at Stanford University who has studied government pension issues. "Anytime you're spending that much of your payroll on pensions, that's money you can't spend elsewhere."

Tulare County, in contrast, will pay the lowest retirement bill among the 20 counties surveyed. Costs there will equal about 15% of payroll in the next budget year, less than a third of what Fresno County will spend.

While Fresno County officials have known for years that their pension system is costly, the new reports underscore just how expensive it's become -- and how long it will remain a burden.

"I knew if we weren't the highest [cost] we had to be close," county Supervisor Phil Larson said. "That's been our problem."

The county's high pension costs come as the county budget is squeezed by the weak economy. Local leaders have laid off employees and slashed programs, from public safety to parks, and more service reductions are expected.

"If we don't address pension costs, it means our service levels will decline [further], and that's not OK," Supervisor Judy Case said.

Fresno County's distinction for having the state's highest relative pension expense among counties has been a long time coming. It started with generous benefits committed to retirees years ago. And it culminates with recent investment losses that have drained pension reserves, and retirement payouts that have continued to climb -- with employees living longer and collecting more.

While employees make a flat and relatively small contribution to the pension fund, the county is on the hook for the balance of retirement obligations.

In the fiscal year beginning July 1, county leaders expect to pour \$180 million into the pension fund, a 30% jump over last year. That's on top of roughly \$35 million of annual debt owed for bonds sold previously to fund pension benefits.

The county's total budget is about \$1.7 billion.

After Fresno County, Kern, Contra Costa and Merced counties will see the highest pension bills next year, according to the statewide survey prepared by Mendocino County's retirement administrator, Jim Anderson. Tulare, Los Angeles and Imperial counties will have the lowest bills.

Anderson said the cost discrepancies are due simply to how much in benefits each county has committed to its employees and how each has managed its reserves.

On average, for every dollar spent on pay, counties will spend 31 cents on pension costs, the survey finds.

Nineteen of the 20 counties with retirement systems took part in the survey. Marin County, which did not participate, is in the process of submitting its expenses, though officials there confirm their relative cost will be about half of Fresno County's.

"It's very telling that Fresno County is the highest in the survey," said Vicki Crow, Fresno County auditor-controller. "It certainly signals that something is amiss."

County leaders acknowledge, however, that at least in the short term, little can be done to trim expenses.

"A promise is a promise, so you don't get to change what you've already done," Case said. "But there can be change going forward."

One of the county's most costly commitments came in 2000 when supervisors settled two lawsuits brought by employees. With a pension fund then flush with investment returns, the county agreed to give employees a supplemental benefit on top of some of the most generous retirement payouts permitted under state law.

"Obviously, the benefit structure offered with our plan, when compared to others, is higher," said Roberto Peña, the county's retirement administrator.

Though supervisors set the level of employee benefits and make the county's annual contribution, the pension fund is managed by an independent agency, which Peña oversees.

In 2005, with the pension fund less robust, supervisors negotiated cheaper retirement benefits for new employees.

County leaders are looking to reduce benefits even further for future employees.

A study recently commissioned by the county, from financial consultant Cheiron, Inc. of McLean, Va., analyzed several new benefit options. They include having new employees contribute more toward their pensions and offering smaller payouts.

The savings reaped from the new benefits, however, would not materialize until the future employees retire. Assuming the least expensive tier is adopted, the county's pension costs would continue rising, peaking between 2014 and 2020, according to the Cheiron report. Pension expenses would not fall below the current level until 2025.

In Cheiron's proposed benefit tier, which does not factor in debt payments, pension contributions would equal 53% of payroll in 2014-15 and 52% in 2020-21.

That compares with a county contribution next year that will equal 44% of payroll, if pension-bond debt is excluded.

County Administrative Officer John Navarrette said adjusting benefit levels for future employees is only a starting point.

"What can we do with current employees -- that will probably be the next series of questions we want to examine," he said.

A much-anticipated report by the state's Little Hoover Commission this week urged state lawmakers to pass legislation allowing local governments to roll back benefits for existing employees -- to spare deeper cuts to local services. Legal challenges to that plan, however, would be certain.

Navarrette said the county is looking to hire legal counsel to explore its options for dealing with current employee benefits. That option and new benefit tiers are expected to be discussed at the March 8 Board of Supervisors meeting.

The county's largest labor union, Service Employees International Union Local 521, acknowledges the county's financial straits, but insists employees aren't to blame.

County supervisors could have invested more into the pension fund when times were good, union spokesman James Geluso said. He added that new employees already have agreed to new, less costly benefits.

"The county needs to look closely and provide a way to fund services while also making sure that somebody who puts in a lifetime of work can still enjoy a secure retirement," he said.

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New Study says Kern County ranks 2nd in pension bill costs

Kern County has some of the highest pension bills in the state, according to a new report. One county supervisor says the study is more proof that government pensions must change, but union spokesmen say the system is fine the way it is.

Kern County ranks 2nd for the highest pension bill in the state according to a survey released by Mendocino County retirement administrator, Jim Anderson.

19 of the 20 counties that are part of the State Association of County Retirement Systems (SACRS) took part in the survey.

Currently, for every dollar it pays its employees, the county must add nearly 40 cents to the pension fund.

"What we're seeing is that the cost of our pension system continues to climb. We had some drastic increases last fiscal year, about a \$40 million increase. It went from \$150 million to \$192 million in the course of one year," said Zack Scrivner, County Supervisor.

That's a huge increase, but unions say the stock market is to blame and their models have always taken into account economic troughs and peaks, so there's nothing to worry about.

"That's based on a straight line trend of last year's data. Kern County has already seen a 14% gain from the stock market in the past year, so that's going to change those numbers. Things are going to get better as the market gets better. Pension funds just like 401Ks depend on the performance of the stock market," said James Geluso, SEIU spokesperson.

Yet, Scrivner says there's just not enough money to go around.

"If we're not able to reach some agreements with our employee groups where they're contributing something to their own retirement and own health care benefits, we may be in a situation where layoffs may be necessary," said Scrivner.

SEIU's newly hired employees already contribute to their pensions. One-third of Kern County Fire Department employees are now contributing 12% to their pensions and have offered to do the same for the remaining two-thirds.

These unions maintain that the problem is not employee contribution, but rather the temporary downturn in the stock market.

"Its true that the pension funds have fallen due to the market and they are already on their way up," said Geluso.

<http://www.kget.com/news/local/story/New-Study-says-Kern-County-ranks-2nd-in-pension/86o4iUho-kO9JG9611vYEQ.csp>

<http://www.bakersfield.com/opinion/letters/x1780163281/Kern-supervisors-have-caused-a-loss-of-trust>

Kern supervisors have caused a loss of trust

The Bakersfield Californian | Saturday, Feb 05 2011 11:03 PM

Last Updated Saturday, Feb 05 2011 11:03 PM

The Kern County Board of Supervisors hired out-of-county attorney Cage Dungy to lead the county's negotiating team in bargaining with SEIU Local 521. Dungy informed the SEIU team that the county's position was political, not budgetary. All union recommendations to save money were quickly dismissed.

The county wants to implement a 20 percent medical premium immediately, and over 24 months, have workers who fall in this category to pay half of their full pension costs. The benefits were offered in exchange for years of low or no raises. These benefits were a written promise.

Imagine all Kern homeowners had a fixed mortgage rate of 4.6 percent, then suddenly the mortgage company raised its rate to 6.7 percent because they're going through hard times. Would the homeowners agree to this?

Currently, the average income for SEIU county employees who would be affected is \$50,238. Most of the lower-paid employees would lose nearly 27 percent of their take-home income. We can expect these employees to lose their housing, vehicles and child care. This will impact our economy severely.

On Dec. 7, the board agreed to extend the Williamson Act tax break despite a cost of \$4.6 million, so corporate farms such as Tejon Ranch and Grimmway Farms wouldn't have to pay as much tax. Was this action out of budgetary concerns or politics?

Perhaps the Board of Supervisors should alter its proposed chamber motto to "In God we trust, because our citizens and employees don't trust us."

DUTCH KOOREN

Bakersfield

Privatizing of Fresno Co. jobs may go to June ballot

Supervisor Poochigian wants to change vote requirement for measure.

Posted at 10:13 PM on Wednesday, Mar. 02, 2011

By Kurtis Alexander / The Fresno Bee

Voters will likely be asked in June to settle the debate over whether Fresno County should outsource government jobs.

A push to privatize parts of the work force, such as the Public Defender's Office and county security, came to a halt last month when only three of five county supervisors supported the cost-cutting effort -- one vote shy of what's needed for approval.

But now county Supervisor Debbie Poochigian is picking up the fight with a proposed June 7 ballot measure that would change the vote requirement for outsourcing to a simple majority.

"I'm disappointed our board didn't do the right thing before," said Poochigian, who plans to ask her colleagues to approve her ballot measure at Tuesday's board meeting. "Ninety percent of the things we do are with a majority vote. I don't think outsourcing should be any different."

For the measure to go before voters, two other supervisors need to agree to put it on the ballot. Both Supervisors Judy Case and Phil Larson, who have backed outsourcing in the past, said Wednesday they will vote to qualify the measure.

Should voters approve the measure, the three board votes needed to outsource jobs appear to be in place.

Poochigian contends that privatizing government jobs will save money as the county grapples with a \$31 million shortfall in the coming budget year. But critics, including the well-funded Service Employees International Union, say the four-fifths vote has merit and should stand.

The higher threshold was put in place in 1976, when voters approved an amendment to the county's charter.

"Fresno County voters understood then that outsourcing is a big decision that should only be done when there's an extremely good reason," James Geluso, spokesman for SEIU Local 521, said in a statement. "That's why they put this safeguard in place, and we're confident Fresno County voters will uphold this in June."

SEIU officials say they will fund an opposition campaign to the June measure. The union represents nearly 4,000 employees, including many whose jobs have been considered for outsourcing.

Last year, the county sought bids from private contractors for running the Public Defender's Office as well as for 54 security jobs. County managers also had planned to solicit bids for janitorial work, but all outsourcing efforts were shelved after Supervisors Susan Anderson and Henry Perea said last month they didn't want to proceed.

Both cited hidden costs that came with outsourcing as well as a potential loss of quality in public services.

Poochigian's June ballot measure is contingent upon a state special election this spring. Gov. Jerry Brown wants voters to extend a handful of statewide taxes on June 7, but the election has not been confirmed.

Including the local measure in the special election would cost the county \$295,000 to \$325,000, according to county elections officials. If the election is done with mail ballots, the county's expense would drop to between \$265,000 and \$300,000.

"The cost to the county will be relatively small in contrast to the millions of dollars [the measure] would save the taxpayer," Poochigian said.

A review of recent bids the county solicited for government work shows the county could save at least \$3.7 million annually. That savings, however, does not factor in costs, such as having to pay unemployment benefits for laid-off workers, nor does it account for quality issues.

"I don't like to see public defense in a for-profit model," said Scott Baly, an attorney for the Public Defender's Office, explaining that a private firm might take shortcuts to save money and not provide fair counsel.

"This is [county] money that should go to the representation of poor people."

The reporter can be reached at kalexander@fresnobee.com or (559) 441-6679.

Workers fight for a fair economy

By Gwyn Harshaw
SEIU Local 521 President

What's happening in Wisconsin?

To put it simply, a governor is using the Wall Street-created economic recession as an excuse to weaken workers' voice in America.

Gov. Scott Walker wants to eliminate most collective bargaining for teachers, nurses, road workers and other public workers. It's really an assault on the middle class.

This at a time when our economy no longer works for most of America's workers. One in six workers today is unemployed. Real wages haven't increased in more than 20 years. Meanwhile, executive bonuses are up 17 percent.



When is OUR recovery?

We need an economy that works for everyone, and in California, our recovery starts with passing Governor Brown's budget proposal and passing tax extensions in June.

Don't be fooled by all the attacks on workers' retirement or that our compensations are the problem. Three important factoids to know:

1. Three independent studies in 2010 found that employees of state and local governments are paid *less* in total compensation than their private sector counterparts when comparing similar work, education, experience and age.
2. Only 27 cents of every pension dollar paid to public sector retirees comes from employer contributions. The rest comes from employee contributions and investment earnings.
3. The economic crash of 2008 is the biggest reason why many state and local budgets are on shaky ground. The bigger problem facing cities and states is the dramatic loss in revenue. This loss in revenue could be fixed if we close tax loopholes that major corporations exploit and make them pay their fair share.

Stay informed, stay engaged, take action. Visit www.seiu521.org and sign up to get the latest budget updates!

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February 2011 Information Technology Report By: Don Brown, Information Technology Director

1. **OFFICE 2010 pre-production test and release:** IT has rolled out Microsoft Office 2010 to select staff for testing and to get a better understanding of Office 2010 capabilities and limitations. Once Testing is done IT will set an installation schedule for the rest of the staff.
2. **IHSS San Mateo IHSS Santa Clara migration planning :** IT has completed work with the IHSS department, UnionWare, and the IHSS database designer to bring the information we input in our IHSS database to nightly upload into L521's UnionWare database. IT also created all the IHSS hot lines and email addresses for San Mateo and Santa Clara including English, Spanish, Vietnamese and Korean.
3. **Symantec antivirus software upgrade:** IT updated all the servers and computers with the latest antivirus definitions to ensure Local 521's computers and servers remain virus free.
4. **Help Desk:** In the month of February the Information Technology Department successfully closed 216 Information Technology Trouble requests from all L521 staff.
5. **Hardware Failure:** L521's main data storage experienced a hardware failure and lost one of the hard drives. IT replaced the malfunctioning part and enabled our storage devise to be in full compliance and redundancy.
6. **Server updates and network security Patches:** All the servers and network have been updated with all the latest security updates and patches and are monitored and configured for health and the security of our data.
7. **Backups:** Monitored and configured all the servers' backups to be performed and monitored for disaster recovery on one central system.
8. **Telephone lines/Internet/Email MPLS:** IT is currently working with the service provider and our phone engineer's and we are currently building the backbone for our MPLS network. Once the backbone is built with in the data provider's central office IT will begin transferring the offices to the new MPLS network. As we begin the transformation each office that is removed from our old VPN network infrastructure will speed up the connection to all the other offices by removing some of the data traffic one at a time. IT is working with the team daily. IT will begin transferring the phone systems and network over effective the week of March 14th for the San Jose, San Mateo, Santa Cruz and Salinas offices. IT will then transfer the Central Valley offices the new phone and MPLS Starting the week of March 21st.

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FIESTA EDUCATIVA, INC

December 2010

SEIU Local 521
1400 Parkmoor Ave. Ste #100
San Jose, CA 95126

To: SEIU Local 521

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On behalf of the children and families at Fiesta Educativa, Inc. we would like to take this opportunity to say **Thank You** for your generous contribution of **catering services** for our 2010 Conference of Fiesta Educativa, San Jose. For your Records your gift is valued at **\$1,311.00**. No goods or services were provided in exchange of your contribution.

The following information is to provide you with a record of your contribution in adherence with the Internal Revenue Reconciliation Act of 1993. **Fiesta Educativa, Inc. is a 501 (c) (3) non-profit organization I.D. #95-4055182.**

Fiesta Educativa, Inc. appreciates your generosity in helping the families that we serve in our community.

Sincerely,

Irene Martinez
Executive Director

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