



# EXECUTIVE BOARD MEETING AGENDA

March 22 & 23, 2013, Start Time: 9:30AM on Saturday and 9:00am on Sunday if necessary

## Fixed Time Items:

1. Saturday – 9:30–10:00am – Region Meetings in the Fresno Office
  - 10:00–10:20am Report Back to Executive Board from Region Meetings
2. Saturday – 10:30–12:00 noon – Trip to Covered CA Event at Fairgrounds - (pages 7-10)
3. Saturday – 12:00–12:30pm – Lunch in the Fresno Office
  - During Lunch Break – Trustees Meeting
4. Saturday – 12:30–12:50pm – PowerPoint Community First Presentation – Khanh Weinberg.
5. Saturday – 12:50pm–1:05pm – Open Forum
6. Saturday – 5:30-6:00pm – Dinner
7. Saturday – end of meeting – Executive Session – Personnel Issues

**Agenda Items will be moved to accommodate fixed time items.**

## Call to Order – Gwyn Harshaw, President – 12:50pm – Open Forum Meeting starts at 12:50pm.

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 1:05 whichever comes sooner. If members arrive before 1:05 and the general meeting has begun, it will be suspended for the members' comments. If Board action is requested, the Board may place the matter on a future agenda. All statements that require a response will be referred to staff for reply in writing.

## Responses to Last Executive Board Meeting Open Forum Issues and other pertinent issues: None

## Roll Call – 12:30AM quorum determined - (Karen N.)

## Swear-In Unsworn Delegates-Alternates-Trustees Present – Obligation/Pledge - (last page of packet)

## Announcements:

1. Yong Soung has resigned her position as Region 6 VP effective 3/14/14.
2. Tulare County Democratic Party - (pages 11-12)

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

## Motion A – Report Consent Agenda Approval - (pages 13-14)

1. Approval of Executive Board Meeting Minutes – December 7, 2013 - (pages 15-24)
2. Budget & Finance Committee Report of March 19, 2014 - (pages 25-50)
  - Financials – January 2014 - (pages 25-40)

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- Income/expenses by Region for 2013 - (pages 41-42)
- 3. Good & Welfare Committee Expenditures Report –
  - February donations – \$250 to Evelyn Ortega – for child’s health condition.
  - March donations -

**Any Requests for Assistance** – please send them to both RoseAnn Dominguez at [ruth.pern@hotmail.com](mailto:ruth.pern@hotmail.com) and Karen Summers at [karen.summers@seiu521.org](mailto:karen.summers@seiu521.org)

**Items Pulled from the Consent Agenda or the Report Consent Agenda**

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

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

1. Officers’ Reports
  - 1<sup>st</sup> Vice President Report – (oral)
  - Regional VP Reports
    - Region 1 - (pages 51-52)
    - Region 2 - (pages 53-54)
    - Region 3 & 4 - (pages 55-56)
    - Region 5 - (pages 57-58)
    - Region 6 - (none)
2. Education and Training Report - (pages 59-60)
3. Organizing Report - (pages 61-62)
4. Communications Report - (pages 63-72)
5. IT Report - (pages 73-74)
6. Admin/Building Report - (pages 75-76)
7. CED Report - (pages 77-98)
8. PAC/PACE Totals Report - (pages 99-100)
9. Trustee Report - (none)
10. Industry, Caucus and Committee Report
  - Nurse Alliance Report - (none)
  - Pension Committee Report - (pages 101-104)
  - SEJ Committee Report – (pages 105-106)
    - AFRAM Report - (pages 107-108)
    - Latino Caucus Report - (pages 109-110)
    - APALA Caucus Report - (pages 111-112)
    - Women’s Caucus Report - (none)
11. Correspondence - (none)

**President’s Report: President Gwyn Harshaw** - (Oral Report)

**Motion B – Political Consent Agenda** - (pages 113-114)

1. Political Motions B/1 – B/13 - (pages 115-140)
2. COPE Blitz and 100 conversations - (pages 141-142)

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## Chief Elected Officer Report: Luisa Blue

1. Fresno County Board of Supervisors' Election (Riko Mendez and Tom Abshere – oral)
2. Harris vs Quinn
3. State Federation of California – Organizing as well as Politics are now their priorities.
4. Contracts -

## New Business

1. **Motion C** – Localwide Convention - (pages 143-144)
2. **Motion D** – Appointment of Trial Committee for Charges in Santa Clara County - (pages 145-146)
3. **Motion E** – Fund the Secured Retirement Work Group - (pages 147-148)
4. **Motion F** – Issue with Monterey County Ratification Vote and its Election Committee - (pages 149-152) Debbie Narvaez, Matt Nathanson and Bill Ragland.
5. Bylaws Consent Agenda - (none)

## Unfinished Business

1. **Update** – Trial Board for a Momentum Bullying Issue – Bill Ragland - (oral)
2. Member vs Non-Member Analysis by Chapter:
  - Member Counts - (pages 153-156)
  - Member Participation - (pages 157-160)
  - Leaders - (pages 161-164)
  - Certified Stewards - (pages 165-166)
  - Stewards - (pages 167-170)
  - Members/Non-Members - (pages 171-174)

## Adjournment

LB/kns SEIU 521 CTW/CLC

## Executive Session

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# Fresno Community Health Fair

## Saturday, March 22

**MARCH 31 IS THE DEADLINE TO ENROLL IN HEALTH COVERAGE**

Find out if you and your family qualify for high quality, low cost health plans before it's too late!



✓ **FREE** Help Enrolling into:

- Medi-Cal
- CalFresh
- Covered California

**PLUS...**

✓ **FREE** Admission & Parking!

✓ **FREE** Health Services!

- Flu Shots
- TDAP Immunizations
- Blood Pressure Checks
- Glucose Screenings
- Disease Education

✓ **FREE** Tax Prep Information!

✓ **FREE** Telemundo Giveaways!

## The Big Fresno Fairgrounds

Gem and Minerals Building

1121 South Chance Ave,

Fresno, CA 93702

Saturday, March 22

9:00am – 2:00pm

For more  
information,  
visit:

<http://getcoverednowca.com/>

or call:  
559-549-4798



\*Private, one-on-one help from Certified Educators, Certified Enrollment Counselors, and County Eligibility Workers understanding and enrolling into Medi-Cal, CalFresh and high quality, low cost health insurance plans through Covered California. Covered California's plans cover doctor visits, medications, hospital stays and more! (See back for more info)

# Enrollment Documents

If you are interested in enrolling in Medi-Cal, CalFresh and/or a health plan through Covered California, please bring:

- ✓ Current Income of all family members on the application (Tax Return, W2, recent pay stubs, etc.)
- ✓ Copy of U.S. Citizenship and residency status
- ✓ Legal resident card or Certificate of Naturalized Citizenship
- ✓ Copy of Social Security Number and Date of Birth for each family member in the household
- ✓ Applicant's California ID or Driver's License

*Note: Not all documents are required for enrollment!*

The Fresno Community Health Fair has been brought to you by:



In partnership with:







# NEWS RELEASE

**MEDIA ADVISORY**  
February 28, 2013

**Contact:** [ashley@harbageconsulting.com](mailto:ashley@harbageconsulting.com)  
**Media Line:** 559-549-4798

## **Free Community Health Fair to Boost Insurance Coverage in Fresno**

*March 22 Fresno Community Health Fair Puts the Community First: Free Health Services and Free Private Counseling for Enrollment into Covered California, Medi-Cal, and CalFresh*

**FRESNO, CA** - As of mid-February, 828,638 Californians successfully enrolled into health plans through Covered California. Service Employees International Union, Local 521 and its partners plan to boost that number at the March 22 Community Health Fair.

While California continues to lead the nation in signing people up for low-cost or no-cost health insurance through the Affordable Care Act, there are still many uninsured yet to enroll. According to January 1 enrollment statistics from Covered California, less than half of the 14,500 people in Fresno County who are eligible for coverage have enrolled. Additionally, in the month of January, only 28 percent of those who enrolled statewide were Latino, compared to the nearly 50 percent who are eligible.

In order to continue to reach California's most vulnerable populations, SEIU Local 521 has partnered with a number of local, community-based organizations in Fresno to host the fair.

**WHAT:** FREE Fresno Community Health Fair  
**WHEN:** Saturday, March 22, from 9:00am – 2:00pm  
**WHERE:** Fresno Fairgrounds' Gem & Minerals Building

Attendees will receive free health services, education about high quality, low cost plans available through Covered California, and private counseling for enrollment into Covered California, Medi-Cal and CalFresh. In addition, representatives from Telemundo will provide free giveaways and representatives from WE Connect will help set up appointments for free tax preparation services.

SEIU Local 521 is a proud participant of Covered California's Outreach and Education Grant Program. Certified Educators from Local 521 have already reached nearly 125,000 people who are likely eligible for financial assistance through Covered California.

"We worked hard to win health care reform and to bring the promise of affordable, quality care to all," said Luisa Blue, Chief Elected Officer of SEIU Local 521. "We are proud to put our community first and ensure all families in Fresno have equal opportunity to thrive."

To date, the following organizations have confirmed participation in the fair: Telemundo, Fresno County Department of Public Health, Clinica Sierra Vista, WE Connect, Service Employees International Union – United Healthcare Workers (SEIU-UHW), United Way Fresno, Sierra Nevada Opportunity Political Action Committee (SNOPAC), HandsOn Central California, and the Fresno Center for New Americans (FCNA).

More information about the event can be found at <http://getcoverednowca.com/>.

### **About SEIU Local 521**

SEIU Local 521 represents 57,000 members in the Central Valley South Bay, and Central Coast Area who work in the public and non-profit sector. For more information about SEIU Local 521, visit [www.seiu521.org](http://www.seiu521.org).

### **About Covered California**

Covered California is the state's marketplace for the federal Patient Protection and Affordable Care Act. With health insurance coverage starting in 2014, Covered California helps individuals determine whether they are eligible for premium assistance that is available on a sliding-scale basis to reduce insurance costs or whether they are eligible for low-cost or no-cost Medi-Cal. Consumers can then compare health insurance plans and choose the plan that works best for their health needs and budget. Small businesses can also purchase competitively priced health insurance plans and offer their employees the ability to choose from an array of plans and may qualify for federal tax credits.

Covered California is an independent part of the state government whose job is to make the new market work for California's consumers. It is overseen by a five-member board appointed by the Governor and the Legislature. For more information on Covered California, please visit [www.CoveredCA.com](http://www.CoveredCA.com).

### **About the Outreach and Education Grant Program**

In May 2013, Covered California awarded 48 organizations, including SEIU Local 521, Outreach and Education grants to be used to conduct outreach and education programs on how Californians can access affordable health care coverage under the federal Patient Protection and Affordable Care Act. Covered California will focus its outreach on 5.3 million Californians in need of individual insurance, about half of whom may be eligible for financial assistance with their premiums. The goal of the grant program is to increase awareness about the new benefits, to educate targeted audiences about the subsidy programs available to them and to motivate consumers and small businesses to be part of obtaining health insurance.

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RUBEN MACARENO  
Chairman  
P.O. Box 2500  
Visalia, CA 93279  
559-237-2126  
ruben.macareno@TulareCDP.org

March 15, 2014

Dear Friend:

I am excited to announce that the 2014 Rose Ann Vuich Recognition Dinner and Silent Auction will be held on Saturday, May 10, 2014 at the Lamp Liter Inn Grand Ballroom in Visalia.

This dinner gives us the opportunity to collectively celebrate and meet as Democrats. It also serves as a venue to thank and formally recognize the volunteers and community members who have helped in the various important efforts here in Tulare County. This event is important in that the funds raised allow us to continue to work at building our base and help elect Democrats. On behalf of our central committee, we hope that you will dig deep to support our local efforts. This is our only major fundraiser of the year and we work hard to make sure it is an enjoyable evening for all attendees.

This year our keynote speaker is State Assemblymember Luis Alejo and Insurance Commissioner Dave Jones. Both are on the cutting edge of historic legislation that is now being implemented statewide and nationally.

We are offering VIP packages for \$1,000 which include tables of eight that will be located closest to the podium, a VIP pre-dinner reception with our special guest, a color advertisement in our Democratic program which will be distributed at the dinner and throughout the year and will be allowed to hang a banner of your campaign or organization in the banquet hall. Regular tables of eight will be sold for \$600 and individual tickets for \$75. We have limited space and I fully expect that this year's dinner will sell out quickly.

As we work to build our Democratic base here in Tulare County I know I can count on you to help us meet our goals! Please call me or email me to reserve a table or to purchase tickets or just send a check to our post office box listed above or to our physical address in care of our Dinner & Program Chairman Jack Gonzalez, 1318 Syrah Ave., Tulare, CA 93274. Checks can be made out to the Tulare County Democratic Central Committee or simply TCDCC.

I thank you for your anticipated support and we look forward to seeing you at the 2014 Rose Ann Vuich Dinner on Saturday, May 10.

Respectfully,

Ruben Macareno

Contributions to the Tulare County Democratic Central Committee are not tax deductible. State law requires us to collect and report the name, address, occupation and name of employer of individuals whose contributions exceed \$100 in a calendar year. FPPC ID #1231808  
Paid for by Tulare County Democratic Central Committee, PO Box 2500 Visalia, CA 932979



presents the

# Rose Ann Vuich Dinner & Democratic Recognition Program

Saturday, May 10, 2014

5:30pm Cocktails & 7:00pm Dinner and Program  
Lamp Litr Inn Grand Ballroom  
3300 West Mineral King, Visalia

Recognition Program / Silent Auction  
VIP Reception / and more

### Keynote Speakers



Assemblyman  
**Luis Alejo**

Insurance Commissioner  
& **Dave Jones**



**VIP TABLE PACKAGE:** Premium seating for eight, admission to special VIP pre-dinner reception, full page ad in program book and hang banner at event.

### FOR INDIVIDUALS

I am a U.S. citizen or a permanent resident alien.

This contribution is made from my own funds, and funds are not being provided to me by another person or entity for the purpose of making this contribution.

I am making this contribution with my own personal credit card and not with a corporate or business credit card or a card issued to another person.

I am not a federal contractor.

I am at least 18 years old.



Signature \_\_\_\_\_

NAME \_\_\_\_\_

OCCUPATION \_\_\_\_\_

ORG/EMPLOYER. \_\_\_\_\_

ADDRESS \_\_\_\_\_ CITY & ZIP \_\_\_\_\_

**Circle one**  
\$1,000 – for VIP Table of 8      \$600 – for a table of 8      \$75 – Single ticket

**NUMBER OF TABLES OR INDIVIDUAL TICKETS** \_\_\_\_

For more information call Ruben Macareno at 559-372-2126 or via email [ruben.macareno@yahoo.com](mailto:ruben.macareno@yahoo.com).

Contributions to the Tulare County Democratic Central Committee are not tax deductible. State law requires us to collect and report the name, address, occupation and name of employer of individuals whose contributions exceed \$100 in a calendar year. FPPC ID #1231808

Paid for by the Tulare County Democratic Central Committee, PO Box 2500 Visalia, CA 932978

## SEIU Local 521 Executive Board Motion

\* **Motion Number: A**

Date: March 22 & 23, 2014

### Motion Title: Report Consent Agenda

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

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

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

1. **Approval of the Minutes for the Executive Board Meeting of December 7, 2013** - (pages 15-24)
2. **Budget & Finance Committee Report** – RoseAnn Dominguez, Local 521 Treasurer  
**March 19, 2014 Meeting** – The Committee reviewed the January 2014 Financials - (25-42), no questions were asked. Some of the reports are in a new format that is by Region
  - B&F Item 1 – Approved - the January 2014 Financials - (page 43-44)
  - B&F Item 2 – Approved – to increase monthly Service Fee Rebate Set Aside from \$42,000 to \$60,000 retroactive to 1/1/14 - (page 45-46)
  - Impact Harris vs Quinn Decision.
  - Service Fee Rebate Report.
  - Discussion – Service Fee Rebate Process.
  - Report Update - Guidelines for SEJ Committee and Caucuses – will be discussed at next Budget & Finance Meeting.
  - B&F Item 3 – Approved – Remodel of Bakersfield Downstairs - (page 47-50)
  - Update – Lost Time checks – weekly reimbursements when completed requests are received.
3. **Good and Welfare Committee Report** – donations in February
  - \$250 to Evelyn Ortega to help with expenses incurred because of her child's health condition.
  - Please submit all Good & Welfare requests to both RoseAnn Dominguez and Karen Summers.

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

**Follow Up:**

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Moved by: \_\_\_\_\_ Second : \_\_\_\_\_

Pulled: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**

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**Minutes December 7 & 8, 2013 –  
Executive Board Meeting  
All business completed Saturday; no meeting Sunday  
Saturday 9:30am for Region Meeting and Reports Back – 4:48pm  
Executive Session: 5:00pm – 5:30pm**

**Call to order** by 1<sup>st</sup> Vice President, John Gutierrez at 10:00am via video conferencing to all offices.

Officers in Attendance at the Meeting:

John Gutierrez	1 <sup>st</sup> Vice President	Alysia Bonner	Region 4 Vice-Pres.
RoseAnn Dominguez	Treasurer	Vacant	Region 5 Vice-Pres.
Muriel Frederick	Region 1 Vice-Pres.	Yong Ok Sung	Region 6 Vice-Pres.
Matt Nathanson	Region 2 Vice-Pres.	Luisa Blue	CEO
Vacant	Region 3 Vice-Pres.		

Executive Board Delegates and Alternates in Attendance at the Meeting:

**REGION 1:**

Cheryl Easterbrook  
Scott Johnson  
Donna Nielsen  
Lesbia Reclosado  
Rosemary Romo  
Lydia Torres  
Lori Niepoth  
Tammy Dhanota

**REGION 2:**

Luis Aguilar  
Javier Sanchez  
Veronica Rodriguez  
Victoria Rodriguez

Diane Goldwasser

**REGION 3:**

**REGION 4:**

Diana Calderon  
Jennifer Jensen  
OC Santiago  
Sergio Garcia

**REGION 5:**

Rudy Plaza  
Linda Krolnik  
Roy Harris  
Regina Kane  
Carmen Morales

Herman Williams

**REGION 6:**

Myrna Bravo  
Huong Chung

**CAUCUS DELEGATES:**

Arvelia Cooper-Whigham  
Wanda Yarbrough  
Rachel Subega

**RETIREE DELEGATES:**

Gary Linsner

Executive Board Officers, Members and Alternates – Excused:

Gwyn Harshaw	Laura Basua	Dolly Clemente
Karen Nakatani	Sonja Bennett	Carol Garvey
Josh Wallace	Imelda Ceja-Bulkiewicz	
Adam Gintz	Greg Gomez	

Executive Board Members and Alternates – Unexcused:

Delia Herrera	Preston George	Marcela Bonilla
Valerie Pickering	Jennifer Stegman	

Local 521 Trustees in Attendance:

William Ragland	Connie Chew
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Local 521 Trustees Absent:

Phillip Brown	Melanie Martinez
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Local 521 Staff in Attendance:

Albert Carlson	Ernest Harris	Carmen Hernandez
Pamela Rodgers	Teneya Johnson	Barbara Cuevas
Karen Summers	Debbie Narvaez	Liane Mazzela
Riko Mendez	Debbie Pate	Dee Jimenez
Don Brown	Beth Thomas	Tommy Gilbreath
Robert Li	Nick Raisch	
Tom Abshere	KC Snodgrass	

Local 521 Members in Attendance:

Richard Long	John Roitz	Brielle Roddy
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Guests:

Catherine McCoy	Eric Stern	Sue Manley
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**Regional Meeting Feedback:**

1. Region 1 – Lydia Torres reported that passion in members is vital, and that identifying, developing and training new leaders on history is a key issue. They also would like things planned with more lead time.
2. Region 2 – Matt Nathanson reported that there was a leadership meeting in October and one coming up next Saturday. They will look at priorities and goals to activate stewards and structure. Most of the 20+ open contracts have been settled. San Benito County is in fact finding and there may be a strike. In November the Scotts Valley sales tax measure passed with 75% yes vote. Salinas is looking at putting a sales tax measure on their next ballot.
3. Region 4 – Alysia Bonner reported that they are trying to turn Fresno County morale around. They are looking at Steward training and regular quarterly meetings of leadership. BOS races there are goals for each chapter and a push to get all chapters involved. Push for 100% membership in all Chapters – go after the service fee payers. Be proactive not reactive.
4. Region 5 – Rudy Plaza reported that impressive goals have been set as far as organizing, membership and steward to member ratios. They are working in 2014 on building the CAT structure so they will be ready for contracts in 2015.
5. Region 6 – Myrna Bravo and Yong Ok Soung reported that they have several goals including increasing training, membership participation, home visits, communication, non-member recruitment. They also would like to see rewards for participation and snacks and drinks at membership meetings so workers feel respected. They said that 70% of homecare workers don't understand how they are paid and want the union to explain.
6. Luisa responded that she was glad to hear this input and the focus is on increasing membership, leadership and growth in Chapters, Regions, and the Local.

**Open Forum Presentations:**

1. Myrna Bravo talked about our health and natural remedies that can help us.



2. Alysia Bonner – Fresno BOS just voted 4 to 1 to make the County of Fresno a “right to work” county. This is a statement of where the County stands as far as employee rights.
  3. Carmen Morales – opportunity to write an article on what a “right to work” county means. The entire Local needs to know this is happening.
  4. Muriel Frederick – all the Regions met – we need to lead by example – we need to go the fight is and walk with our brothers and sisters. We need to show up and support each other across Region lines.
  5. Jennifer Jensen – the Fresno BOS got a retroactive raise.
  6. Luisa – we must “flip the BOS” in Fresno or we will continue to have problems.
  7. Diana Calderon – members from all over the Local need to support Fresno. We are stronger together.
  8. Luisa – San Benito County needs help.
  9. Luis Aguilar – the City Council of Hollister is cleaning house. They are getting rid of the “old guard”. They have hired a new City Manager at a much higher wage. This is good for workers because their salaries are benchmarked to his.
  10. Gwyn and Karen Nakatani sent their Holiday Greetings although they were unable to attend the meeting.
- 

**Call to Order:** 1<sup>st</sup> Vice President, John Gutierrez, formally called the meeting of the Executive Board for December 7 & 8, 2013, to order on Saturday December 7, 2013 at 10:00am. A quorum was present. The Regional Meeting were held at 9:00 and report backs were done following those meetings at 9:30am.

**Pledge of Allegiance to the Flag:** was requested and done.

**Responses to Last Executive Board Meeting Open Forum Issues:**

1. The Attorney’s letter addressing the question of vacant vs vacated Executive Board seats is in the packet.
2. The list of thoughts to change Service Fee Payers to members was in the packet.
3. Carmen Morales had requested Service Fee Payers by Region – that document was in the packet.

**Swear-In of Unsworn Delegates-Alternates-Trustees Present** – There were none.

**Announcements:** There were Fixed Time Items on the Agenda which will be reported in the appropriate business item if possible.

1. Luisa called for a moment of silence to reflect on the loss of Nelson Mandela who died 12/6/13 after 27 years in prison for fighting apartheid, a South African government racial policy. After release from prison he became the first black President of South Africa.

2. Candlelight Vigil by IHSS members at 70 West Hedding on Wednesday at 4:00pm.
3. APALA Holiday Party on December 22<sup>nd</sup> from 11am-5pm.
4. Contract Enforcement Department Overview with KC Snodgrass – CED Director and Carmen Hernandez – CED Administrative Director:  
There is the Contract Enforcement Specialist side of the Contract Enforcement Department and the CESA administrative help to the Specialists side.  
Currently there are 332 grievances or disciplines that are unresolved. There is a backlog of grievances – the oldest is from 2008. We are working to resolve them, but sometimes the process is very slow.
5. Albert Carlson, Research Director, did a powerpoint on Inequality showing the disparity in the economic recovery between low paid jobs and other jobs and the racial and ethnic disparity of people keeping the existing and landing the reemerging jobs. There are many lower wage jobs coming back, but middle class jobs are not coming back to the level prior to the fall. There is a far bigger gap between the rich and the poor. Corporate profits are up yet wages are falling. Corporations are not paying their share of the taxes. There is less mobility in a society when the disparity between the rich and the poor is great. Unfortunately, many think that unions are an obstacle to equality because of union wages and pensions. However, the opposite is the truth, unions actually increase the numbers of workers in the middle class. Proposition 13 has been a problem with having corporations pay their proper property taxes.
6. Albert Carlson did an update on the Covered CA Grant. We have been hugely successful thus far in the process of meeting our goals. Some of the problems have been in other areas: delays getting paper applications into the system, getting people from Covered CA to the insurance companies, and getting call backs on our leads – now we are giving the leads directly to those who can sign the people up.
7. The Trustees did not meet during lunch because there was too much noise via video conference.
8. International Leadership Module Training by Beth Thomas.  
She presented the module - SEIU Leadership Standards: Leaders in Action for Justice.  
The Definition of Leadership in SEIU is the ability to inspire, develop, collaborate with and align others to take action, and successfully achieve our common goals.  
SEIU Leadership Standards are:
  - Shared unity of purpose
  - Openness to questions and willingness to learn
  - Acting with the courage of our convictions
  - Working together with accountability
  - Commitment to inclusion

It costs to be a leader. Execution and follow through are essential. Members want to be heard/their story told – leadership should be the verb to make that happen.
9. John Roist was nominated, seconded and accepted unanimously by the Executive Board as the Region 2 Trustee to replace retired Catherine Farnham. He was then immediately sworn into office.

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**Various actions of the Board were done as time permitted throughout the meetings Saturday. They are enumerated below.**

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**Motion A – Report Consent Agenda Approval:**

1. Approval by the Executive Board Meeting Minutes of September 28 & 29, 2013.
2. Budget & Finance Committee Report of November 20, 2013 and September 2013 Financial Documents.
  - Budget & Finance Committee Item 1 – Approved – the September 2013 Financials under the consent agenda.
  - Budget & Finance Committee Item 2 – Approved – the Budget & Finance Meeting Schedule – the meetings will be January 15, February 19, March 19, April 16, May 14, June 18, July 16, August 20, September 17, October 15, November 19.
  - B&F Item 3 – Approved – Recommendation that the EBd approve the Draft 2014 General Fund and Organizing Budgets with an increased \$48,000 in the Building Fund.
  - B&F Item 4 – Approved – to close the IHSS Trust Fund Account and transfer half the funds to the Building Fund and half to the Capital Fund.
  - B&F Item 5 – Tabled until the next Budget and Finance Meeting – to move a \$10,000 overpayment from the General Fund to allow time to notify the International.
  - Discussion on funding a Developmentally Disabled Council Consultant to update the Executive Board. The Budget and Finance Committee agreed that because of our structural budget deficit and because the priorities for the State Council and the International are not organizing DD facilities that SEIU Local 521 should not help fund a DD Council staff person at this time. There are changes happening with closures of State emotional and physical facilities and redirecting these patients to other facilities that may change the organizing priorities of the State Council and International. If organizing Regional Facilities should become a priority, then funding could be reconsidered. Local 521 will continue to lobby for DD issues and send members and staff to the DD Council meetings.
  - Ming reported on the success of the AMEX Policy and the auditor's audit of AMEX. A new mileage reimbursement form will be rolled out soon that is easier and more aligned with DOL rules.
3. Good & Welfare Committee Expenditures Report – November donations - none  
Any Requests for Assistance – please email them to both RoseAnn Dominguez at [ruth.pern@hotmail.com](mailto:ruth.pern@hotmail.com) and Karen Summers at [karen.summers@seiu521.org](mailto:karen.summers@seiu521.org).

**Motion:** To approve/confirm as presented All Reports on the Report Consent Agenda.  
Duly moved; seconded; passed as presented

## **Motion B – Political Consent Agenda:**

### **Motion B/2 – Senate and Assembly Endorsed Candidate Contributions**

**Motion:** To approve the contributions as shown on the attached chart. In the packet.  
Duly moved; seconded; passed as presented under the Political Consent Agenda.

### **Motion B/3 – Support SEIU 521 Members at Kern Medical Center – SEIU Issues PAC - \$10,000**

**Motion:** To approve \$10,000 from the SEIU Local 521 Issues account to support the SEIU Local 521 members at kern Medical Center (Public Hospital).  
Duly moved; seconded; passed as presented under the Political Consent Agenda.

**Motion B:** To approve as presented All Motions on the Political Consent Agenda.  
Duly moved; seconded; passed as presented.

## **B/1 was pulled from the consent agenda.**

### **Motion B/1: Endorsement of the 5 Political Priorities for the Local.**

**Motion:** Recommended Top 5 Political Priorities 2014.

Utilize the Community First approach and focus on leadership and member political action.

1. Organizing to grow the union: Childcare Organizing and support for the low wage worker campaign;
2. Revenues: State and Local;
3. Pensions: Defeat anti-pension initiative and support SB 1234 implementation;
4. Local and State Elections;
5. Healthcare: ACA implementation and public health services.

Duly moved; seconded; passed as presented.

There was a powerpoint presentation.

Riko Mendez, Political Director, Report:

There is a new COPE Committee that has been formed in Fresno. The election of officers will be in January.

## **Written Reports & Correspondence Requiring no Action by the Board:**

### 1. Officers' Reports

- 1<sup>st</sup> Vice President Report – Negotiations with OPEIU and CWA have been completed
- Regional VP Reports
  - Region 1 - in packet
  - Region 2 - in packet
  - Region 3 - in packet
  - Region 4 - in packet
  - Region 5 - in packet - There is a huge battle in Kern County to save the Kern County Medical Center from being privatized. There were problems with mismanagement of money by former CEOs of the hospital and lack of adequate oversight by the Bounty BOS. The most recent CEO who was fired was union friendly; the new CEO is not union friendly. If the hospital is lost it

will mean loss of members to the union, and loss to the community of a level 2 trauma center. The nearest one would then be 100 miles away.

2. Education and Training Report – The Education & Training Committee plans to meet in December/January to begin the process of evaluating current steward training modules and developing advanced steward training modules.
3. Organizing Report - (in packet)
4. Communications Report - (in packet)
5. IT Report - (in packet)
6. Admin/Building Report - (in packet)
7. PACE/PAC Totals Report - (in packet)
8. Trustee Report - (in packet)
9. Industry, Caucus and Committee Report
  - Nurse Alliance Report – submitted by Carmen Morales - (in packet)
  - Pension Committee next meeting is Wednesday December 11, 2013 from 6-8pm via video conferencing.
  - SEJ Committee Report - (none)
  - Central Valley AFRAM - (none)
  - Latino Fresno Caucus Report - (none)
  - Women’s Caucus Report - (none)
10. Correspondence - (none)

**President’s Report: President Gwyn Harshaw - none**

**Chief Elected Officer Report: Luisa Blue**

Updates:

- Immigration Reform Update:  
Eliseo Medina “FAST for Immigration” video was shown. Fast for families. He passed on his fast to Robert Kennedy’s grandson.
- Fast Food action in Bakersfield with others coming up.
- Immigration Reform Coalition in Tulare. 22 groups met. Tulare County for Families is the coalition’s name.
- Community First – SEIU is continuing to work on other issues using Community First as our slogan.
- Philippines Typhoon Haiyan Relief Work – SEIU is leading the way in relief work. Thousands and thousands of Philippians are in the union. Several SEIU 521 SEJ Caucuses have donated from their budgets to the Philippine Relief effort.

**New Business:**

**Motion C:** Schedule for 2014 Officers’ and Executive Board Meetings

**Motion:** To accept the schedule listed above for monthly meetings of the Officers and quarterly meetings of the Executive Board.

Executive Board Meetings: March 22-23, 2014, June 28-29, 2014, September 27-28, 2014, December 6-7, 2014.

Officers' Meetings: January 28, 2014, February 25, 2014, April 22, 2014, May 20, 2014, July 22, 2014, August 26, 2014, October 28, 2014.

Duly moved; seconded; passed as presented.

**Motion D:** Approval of the SEIU Local 521 Draft 2014 General Fund and Organizing Budgets

**Motion:** For the Executive Board to approve the SEIU Local 521 Draft 2014 General Fund Budget and the Draft 2014 Organizing Budget recommended by the Budget & Finance Committee.

Duly moved; seconded; passed as presented.

**Motion E:** Authorization for Carmen Morales to attend the National Nurse Alliance Leadership Council Meetings on Behalf of Luisa Blue.

**Motion:** To authorize that Carmen Morales attend the National Nurse Alliance Leadership Council Meetings on Behalf of Luisa Blue whenever possible.

Duly moved; seconded; passed as presented.

**Motion K:** Concurrence of Appointment to the Budget and Finance Committee for Region 5 Open Seat.

**Motion:** To concur with the appointment of the President of Rudy Plaza to the open Region 5 seat on the Budget and Finance Committee.

Duly moved; seconded; passed as presented

#### **Motion F – Bylaws Consent Agenda:**

**Motion F/1 – Acceptance of the APALA Bylaws Approved by the Localwide Bylaws Committee**

**Motion:** To approve the APALA Caucus Bylaws as presented.

Duly moved; seconded; passed as presented under the Bylaws Consent Agenda.

**Motion F/2 – Acceptance of the VTA Chapter Bylaws Approved by the Localwide Bylaws Committee**

**Motion:** To approve the VTA Chapter Bylaws as presented.

Duly moved; seconded; passed as presented under the Bylaws Consent Agenda.

**Motion F/3 – Acceptance of the San Benito County Chapter Bylaws Approved by the Localwide Bylaws Committee**

**Motion:** To approve the San Benito County Chapter Bylaws as presented.

Duly moved; seconded; passed as presented under the Bylaws Consent Agenda.

**Motion F:** To approve as presented All Motions on the Bylaws Consent Agenda.

Duly moved; seconded; passed as presented.

#### **Unfinished Business:**

**Motion G:** Extension of Part-Time Contract with Kristy Sermersheim

**Motion:** To agree to continue the part-time contract with Kristy Sermersheim through December 31, 2013, and her use of accruals in January 2014 prior to her pay-out.  
Duly moved; seconded; passed as presented.

**Motion H:** Concurrence of Appointment to the Localwide Strike Hardship Committee Chair  
**Motion:** To concur with the appointment of the President of John Gutierrez as Chair of the Localwide Strike Hardship Committee.  
Duly moved; seconded; passed as presented.

**Motion I:** Concurrence of results of Officers' Email Poll.

**Motion:** To concur that this is an accurate report of these motions.

1. To endorse Barigye McCoy for Fresno County Equal Opportunities Commission.
2. To officially recognize the newly formed Fresno COPE Committee.
3. To contribute up to \$10,000 from either the SEIU Issues Account / the SEIU International grant / or some combination of both to be determined by SEIU 521 Political Director; to the Sierra Nevada Opportunity Organization (SNO) to support their issue activation and community organizing work in Fresno County. PACE also recommends approval of \$452 from the PACE Issues account to support the effort outlined above.

The three motions were passed: Alysia, RoseAnn, Muriel, John, Matt, and Karen all voted yes which was a majority vote.

**Motion J:** Approval/Concur the Appointments of a "Trial Committee" to Hear Charges against a Momentum Member.

**Motion:** To approve/concur the Presidential appointments of Lori Niepoth, Bill Ragland, Lydia Torres, and Scott Johnson to hear charges against a Momentum Member.  
Duly moved; seconded; passed as presented.

**Motion N:** State Council Support for DD Industry Upgrade

**Motion:** To direct our representatives to the SEIU State Council to support the SEIU California DD Council's work to create a sustainable budget model for DD services as a priority of the State Council for 2014.

Duly moved; seconded; passed as presented by Catherine McCoy and Del Mallory.

Member vs Non-Member Analysis by Chapter was presented in the packet.

- Member Counts
- Member Participation
- Leaders
- Certified Stewards
- Stewards
- Members/Non-Members

### **Adjournment of Executive Board Meetings into Executive Session:**

Moved; seconded; passed for adjournment of the Executive Board Meetings of December 7 & 8, 2013, at 4:48pm into Executive Session.

### **Motions Put on the Record After Executive Session:**

**Motion L:** Acceptance of CWA Contract

**Motion:** The Tentative Settlement with CWA on their Contract that expired February 28, 2013, has been ratified by the SEIU Local 521 employees represented by CWA. The Officers, on behalf of the Executive Board, agree to accept the terms and conditions of the ratified Tentative Settlement.

Duly moved; seconded; passed as presented.

**Motion M:** Me Too for the Unrep Unit

**Motion:** The Officers on behalf of the Executive Board agree to allow the Unrep unit to follow the terms and conditions of the ratified CWA Tentative Settlement.

Duly moved; seconded; passed as presented.

**Final Adjournment of the December 7 & 8, 2013 Executive Board Meeting at 5:30pm on December 7, 2013. No meeting on December 8, 2014.**



## SETU Local 521

Bank Balance on Saving and Investment accounts  
as of January 31, 2014**DISCRETIONARY SAVINGS**

ITEMS	GL#	ACCOUNT NAME	Bank	BALANCE as of 12/31/2013	+/- reason	BALANCE as of 1/31/2014
1	1005	CONTINGENCY FUND	Bank of The West #18986	50,088.75		50,088.75
2	1006	STRIKE FUND	Bank of The West #18978	56,778.71		56,819.35
3	1006	STRIKE FUND	Bank of The West - T- Bill Matures 4/17/2014	800,000.00		800,000.00
4	1006	STRIKE FUND	Bank of The West - T- Bill Matures 2/27/14	700,000.00		700,000.00
5	1016	LEGAL DEFENSE FUND	Bank of The West # 28691	29,529.11	Accrued \$0.12 per month per member	36,327.11
6	1016	LEGAL DEFENSE FUND	Bank of The West - T- Bill Matures 2/27/14	500,000.00		500,000.00
7	1017	GOOD & WELFARE FUND	Bank of The West #28758	5,432.15		5,332.15
8	1017	GOOD & WELFARE FUND	Bank of The West - T- Bill Matures 2/27/14	65,000.00		65,000.00
9	1018	CAPITAL FUND	Bank of The West # 28667	67,399.93	Accrued \$1,000 per month + 12/2013 motion	78,399.93
10	1019	BUILDING FUND	Bank of The West #28733	38,848.52	Acc \$2k per mon,\$10K from 12/2013 motion	50,848.52
11	1011	Accrued Vacation from EO to IO	Bank of The West #18820	150,330.32	Vacation bank transfer between EO and IO	150,330.32
Total reserve				<b>\$ 2,463,407.49</b>		<b>\$ 2,493,146.13</b>

**POLITICAL - PAC money**

12		PAC - Candidates	US Bank - Olson	41,528.75	Olson Statement Reconciled as of 1/31/2014	48,681.35
13		PAC - Issues	US Bank - Olson	17,454.49	Olson Statement Reconciled as of 1/31/2014	16,404.49
14		PAC - Independent Expenditure	US Bank - Olson	136,693.02	Olson Statement Reconciled as of 1/31/2014	126,643.02
				<b>\$ 195,676.26</b>		<b>\$ 191,728.86</b>

**MANDATORY SAVINGS**

15	1002	ORGANIZING FUND	Bank of The West #18895	328,148.63		174,442.30
16	1002	ORGANIZING FUND	Bank of The West - T- Bill Matures 4/17/2014	2,750,000.00		2,750,000.00
17	1002	ORGANIZING FUND	Monterey County Employee Credit Union	203,023.60	CD with credit union	203,023.60
18	1002	ORGANIZING FUND Acc Vac	Bank of The West #33823	309,003.23	Accrued time off - adjust monthly to actual accrual	296,914.14
19	1003	AGENCY FEE	Bank of The West #18960	12,162.37	\$42,000 accrual monthly	49,647.18
20	1003	AGENCY FEE	Bank of The West - T- Bill Matures 3/2014	470,000.00		470,000.00
				<b>\$ 4,072,337.83</b>		<b>\$ 3,944,027.22</b>

**Unfunded Reserve and Liabilities**

21	2150-10	RETIREE BENEFIT TRUST	Unfunded Reserve	536.00	+ \$1 / month	537.00
22	2150-11	CLARENCE DODGE SCHOLARS	Unfunded Reserve	20,131.04	+ \$1250 / mon,	21,381.04
23	2400-00	Accrued Vacation for General Fund	Liabilities	2,111,987.84	adjust monthly to actual accrual	2,062,569.76
				<b>\$ 2,132,654.88</b>		<b>\$ 2,084,487.80</b>

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	A	B	C	D	E
1	<b>SEIU LOCAL 521</b>				
2	<b>Income Statement - Current and YTD</b>				
3	<b>For the One Month Ending Friday, January 31, 2014</b>				
4					
5		<b>Budget</b>	<b>January</b>	<b>Better / (Worse)</b>	<b>Notes</b>
6					
7	<b>TOTAL DUES RECEIPTS</b>	<b>2,536,633</b>	<b>2,467,415</b>	<b>(69,218)</b>	
8					
9	<b>OTHER INCOME</b>				
10	Interest & Dividends	300	210	(90)	interest rate is very low
11	Sublease Rent	5,583	7,396	1,813	
12	Misc. Income - SEIU Int'l Subsidy	-	2	2	
13	<b>TOTAL OTHER INCOME</b>	<b>5,883</b>	<b>7,608</b>	<b>1,725</b>	
14					
15	<b>TOTAL GENERAL FUND INCOME</b>	<b>2,542,517</b>	<b>2,465,023</b>	<b>(77,494)</b>	
16					
17	<b>GENERAL FUND EXPENSES</b>				
18	<b>ORGANIZING OFFSET</b>	<b>335,431</b>	<b>335,431</b>	<b>-</b>	
19					
20	<b>SALARIES</b>				
21	Administrative	36,883	29,774	7,109	AR unfilled
22	Admin Support	35,319	32,321	2,998	
23	Directors	94,985	97,174	(2,189)	
24	Internal Organizers/Research	335,630	318,212	17,418	vacant positions
25	Clerical	83,878	75,039	8,839	2 vacant positions
26	Facilities	7,466	7,373	92	
27	Data Base Services	23,201	22,460	742	
28	Temp. Internal Organizers/Research	6,250	2,929	3,321	contractors on NEG
29	Temp. Clerical/Support	1,667	8,728	(7,061)	temp on 3 vacant positions
30	Vacation & Comp Time	33,333	21,658	11,675	actual cash out
31	<b>TOTAL SALARIES</b>	<b>658,612</b>	<b>615,667</b>	<b>42,945</b>	
32					
33	<b>PAYROLL RELATED</b>				
34	Pension	111,125	103,035	8,090	unfilled positions
35	Payroll Taxes Expenses	74,083	93,020	(18,936)	FUTA paid out beginning of year
36	Travel Staff-Admin	4,167	2,755	1,412	
37	Travel Staff- Internal Organizers	10,000	4,643	5,357	
38	Mileage/Ins. Reimb.-Admin & Director	1,138	225	913	
39	Mileage/Ins. Reimb.-Internal Organizers	11,303	12,038	(735)	
40	Telephone Reimbursement	7,500	8,718	(1,218)	
41	Retiree Health Exp	9,077	8,628	450	
42	Retire Benefit Trust Fund	1	1	-	
43	Benefits(Health, Dental, Vision,life,401K, Flex Plan matching)	259,245	218,764	40,481	unfilled positions
44	Workers Comp Insurance	21,608	19,400	2,208	
45	Recruiting exp	667	99	567	
46	<b>TOTAL PAYROLL RELATED</b>	<b>509,915</b>	<b>471,325</b>	<b>38,590</b>	
47					
48	<b>TOTAL SALARIES &amp; PAYROLL RELATED</b>	<b>1,168,527</b>	<b>1,086,992</b>	<b>81,535</b>	
49					

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4					
5		<b>Budget</b>	<b>January</b>	<b>Better / (Worse)</b>	<b>Notes</b>
50	<b>MISCELLANEOUS</b>				
51	Agency Fee/Assoc. Exp.	42,000	42,000	-	
52	Capital Fund Expense	1,000	1,000	-	
53	Admin exp share w. chapter	1,000	509	491	
54	Free Life insurance to members (SCR, MRY & BFL)	333	312	21	
55	Dodge Scholarship	1,250	1,250	-	
56	Computer Database Unionwares	6,000	10,296	(4,296)	2 months invoices
57	<b>TOTAL MISCELLANEOUS</b>	<b>51,583</b>	<b>55,367</b>	<b>(3,784)</b>	
58					
59	<b>ARBITRATIONS &amp; LEGAL</b>				
60	Arbitrations Fees & Legal Admin.	12,500	8,593	3,907	
61	Retainer	21,500	21,500	-	
62	Automatic Legal Defense Fund (\$0.25 per member per month)	6,798	6,798	(0)	
63	<b>TOTAL ARBITRATIONS &amp; LEGAL</b>	<b>40,798</b>	<b>36,891</b>	<b>3,907</b>	
64					
65	<b>FACILITIES</b>				
66	Rent-San Jose	37,500	36,574	926	
67	Rent-San Carlos	4,833	5,256	(423)	
68	Rent-Santa Cruz & Watsonville	3,917	3,325	592	
69	Rent-Hanford	1,700	500	1,200	
70	Utilities	13,750	14,349	(599)	
71	Kitchen Sundries	4,167	(653)	4,820	new vendor gave credit to start
72	Gen. Liab. Ins. & Property Tax	14,167	12,746	1,421	
73	Building Maintenance/Security/Janitorial	15,000	17,212	(2,212)	HVAC repair for varies offices
74	<b>TOTAL FACILITIES</b>	<b>95,033</b>	<b>89,308</b>	<b>5,725</b>	
75					
76	<b>ADMINISTRATIVE - OFFICES</b>				
77	Audit/Acct. Fees	10,167	2,506	7,661	
78	Subscriptions	350	335	15	
79	Office Sundries	5,833	2,302	3,531	
80	Office Equipment Leases	16,000	17,806	(1,806)	extra month billing
81	Equipment Maintenance & Repair Contracts	5,841	4,779	1,062	
82	Contributions	250	432	(182)	
83	Research Material & Data	931	850	81	
84	<b>TOTAL ADMIN - OFFICES</b>	<b>39,372</b>	<b>29,010</b>	<b>10,362</b>	
85					
86	<b>COMMUNICATIONS</b>				
87	Printing	3,500	2,977	523	
88	Paper	1,667	2,948	(1,281)	paper stock
89	Website/Station/Communication	2,583	199	2,384	
90	Telephone & Internet	17,623	16,463	1,160	
91	Postage	5,000	4,695	305	
92	Professional Fees/Translations	417	266	151	
93	<b>TOTAL COMMUNICATIONS</b>	<b>30,789</b>	<b>27,548</b>	<b>3,242</b>	
94					

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3	<b>For the One Month Ending Friday, January 31, 2014</b>				
4					
5		<b>Budget</b>	<b>January</b>	<b>Better / (Worse)</b>	<b>Notes</b>
95	<b>STAFF MEETING &amp; TRAINING</b>				
96	Staff / Director Training	1,433	421	1,013	
97	Staff - Representation & Political & Communication	5,000	4,723	277	
98	Clerical Staff	75	-	75	
99	Executive Staff			-	
100	Tuition Reimbursement-CWA	83	-	83	
101	Tuition Reimbursement-OPEIU	167	-	167	
102	<b>TOTAL STAFF MEETING &amp; TRAINING</b>	<b>6,758</b>	<b>5,143</b>	<b>1,615</b>	
103					
104	<b>EDUCATION &amp; TRAINING</b>				
105	Steward & Chief Steward Training	584	916	(332)	
106	Executive Board	42	-	42	
107	Education & Training Committee Meeting & Materials	-	38	(38)	
108	Industry Training Events	417	52	365	
109	<b>TOTAL EDUCATION &amp; TRAINING</b>	<b>1,042</b>	<b>1,005</b>	<b>36</b>	
110					
111	<b>POLITICAL/SOCIAL INVOLVEMENT</b>				
112	Candidates Account (\$0.10 per member per month)	10,305	7,653	2,652	
113	Issues Account (\$0.10 per member per month)			-	
114	I.E. Account (\$0.00 per member per month)			-	
115	Legal	3,333	2,316	1,017	
116	Committee Meetings	910	1,448	(538)	
117	Conferences	83	-	83	
118	Electoral Staff/ Activity			-	
119	Polls & Surveys	167	-	167	
120	Special Printing	8	-	8	
121	Subscriptions	17	-	17	
122	<b>TOTAL POLITICAL/SOCIAL INVOLVEMENT</b>	<b>14,823</b>	<b>11,417</b>	<b>3,406</b>	
123					
124	<b>SOCIAL &amp; ECONOMIC JUSTICE</b>				
125	Committee Meetings	1,260	893	367	
126	Contributions/Solidarity	1,920	-	1,920	
127	Caucus Activities	15,850	2,652	13,198	
128	<b>TOTAL SOCIAL &amp; ECONOMIC JUSTICE</b>	<b>19,030</b>	<b>3,545</b>	<b>15,485</b>	
129					
130	<b>MEMBER INVOLVEMENT</b>				
131	Memorabilia/Give Away/ Member Pride	2,500	1,154	1,346	
132	Awards/Recognition	83	-	83	
133	Planning & Event Prep			-	
134	Ex Board / Advisory Board Reimbursement	167	-	167	
135	Rally Rental & Bus	1,667	310	1,356	
136	Member Reimbursement/Lost time	208	236	(28)	
137	Transportation & Vehicle Expenses	1,000	577	424	
138	<b>TOTAL MEMBER INVOLEMENT</b>	<b>5,625</b>	<b>2,277</b>	<b>3,348</b>	
139					

	A	B	C	D	E
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3	<b>For the One Month Ending Friday, January 31, 2014</b>				
4					
5		<b>Budget</b>	<b>January</b>	<b>Better / (Worse)</b>	<b>Notes</b>
140	<b>NEGOTIATIONS</b>				
141	Printing Contracts	4,167	-	4,167	
142	Meetings & Supplies	4,167	3,845	321	
143	Professional Negotiations	2,500	8,234	(5,734)	for region 2 & 4 NEG
144	Strike Preparations	3,333	-	3,333	
145	Automatic Strike Fund Transfer (\$0.50 per member/mom)	1	-	1	
146	<b>TOTAL NEGOTIATIONS</b>	<b>14,168</b>	<b>12,079</b>	<b>2,089</b>	
147					
148	<b>MEETINGS &amp; EVENTS</b>				
149	Executive Board Meetings	2,500	(152)	2,652	
150	Steward/Council Meetings	-	94	(94)	
151	521 Party & Other Events	3,417	64	3,352	
152	By Law Convention - 400 mbr			-	
153	Industries & Members Conference	2,083	-	2,083	
154	Miscellaneous				
155	<b>TOTAL MEETINGS &amp; EVENTS</b>	<b>8,000</b>	<b>6</b>	<b>7,994</b>	
156					
157	<b>REPRESENTATIVE DUES</b>				
158	SEIU \$7.65 ea	433,365	426,035	7,330	
159	SEIU Unity Fund \$5.00ea	252,435	262,615	(10,180)	more mbr met and above the min.
160	SEIU Retirees \$1.00ea	746	828	(82)	
161	SEIU State Council \$2.53ea	143,322	139,154	4,168	
162	Nurse Alliance \$1.45ea	1,015	974	41	
163	So Bay CLC \$0.55ea	14,514	14,302	212	
164	SMCO CLC \$0.60ea	2,047	2,380	(333)	
165	Fresno CLC \$0.45ea	2,673	2,232	441	
166	Bakersfield CLC \$0.25ea	4,162	2,093	2,069	
167	Monterey & Santa Cruz LC \$0.55ea	3,419	3,436	(17)	
168	CA Labor Fed 25% X .47ea	1,371	1,308	63	
169	Building Trades-SMCO	300	-	300	
170	North Valley CLC \$.55ea	110	110	-	
171	<b>TOTAL REPRESENTATIVE DUES</b>	<b>859,478</b>	<b>855,465</b>	<b>4,013</b>	
172					
173	<b>TOTAL GENERAL FUND EXPENSES</b>	<b>2,690,458</b>	<b>2,551,485</b>	<b>138,974</b>	
174					
175	<b>TOTAL INCOME LESS TOTAL EXPENSES</b>	<b>(147,942)</b>	<b>(86,462)</b>	<b>61,480</b>	
176					
177	<b>VOLUNTARY TRANSFERS</b>				
178	Building Funds	4,000	4,000	-	
179	Strike Funds	-	-	-	
180	<b>TOTAL VOLUNTARY TRANSFERS</b>	<b>4,000</b>	<b>4,000</b>	<b>-</b>	
181					
182	<b>TOTAL INCOME LESS EXPENSES &amp; TRANSFERS</b>	<b>(151,942)</b>	<b>(90,462)</b>	<b>61,480</b>	

SEIU Local 521  
Organizing Statement for the year of 2014

Doc # 3

	A	B	C	D	E
1		Year 2014		Jan-14	
2		12 months			Better /
3		Budget	Budget	Acutal	Worst
4	Budget from SEIU Local 521	4,025,172	335,431	335,431	-
5					
6	<b>Expenses</b>				
7	Legal - Organizi	28,200	2,350	2,350	-
8	Arbitration - Organizing	2,500	208	-	208
9	Lost Time - Organizing	243,614	20,301	-	20,301
10	Salaries - Organizing (15+2)	1,748,079	134,468	72,118	62,349
11	Workers Comp. Ins. - Org	61,183	4,706	2,600	2,106
12	Payroll Tax Exp - Organ.	209,769	16,136	6,925	9,211
13	401K Matchering	52,442	4,034	2,058	1,976
14	EMPLOYEE BENEFITS - Organizing	719,827	59,986	22,916	37,069
15	Pension Plan Exp - Organi.	314,654	24,204	12,071	12,133
16	Staff Recruiting Exp-Org.	10,000	833	-	833
17	Vacation / Comp Time - Org	67,234	5,603	2,829	2,774
18	Training Exp - Org.	5,858	488	-	488
19	Mileage reimb exp - Organizing	86,748	7,229	757	6,472
20	Vehicle Expenses	26,718	2,227	3,183	(956)
21	RENT EXPENSES - Organizing	1,103	92	-	92
22	Telephone Expenses - Organizin	15,286	1,274	957	317
23	Utilities Expenses	-	-	-	-
24	Office Supplies & Other Allocation - Organiz	23,538	1,962	990	972
25	Printing Expenses - Organizing	1,958	163	-	163
26	Postage Expenses - Organizing	508	42	-	42
27	PT Organizing	-	-	-	-
28	Communication Cost Expenses	5,539	462	-	462
29	Referral lead/DATA - Organizing	1,000	83	-	83
30	Professional Fee Expenses	91,434	7,620	392	7,228
31	Translation Expenses - Organ	202	17	-	17
32	Equipment Leasing Exp - Organi	-	-	-	-
33	Equip. Maint. & Repair -Organi	1,148	96	-	96
34	Building Maint. & Repair -Organi	-	-	-	-
35	Computer Database Services	1,000	83	-	83
36	Subcriptions - Organizing	200	17	-	17
37	Travel Expenses - ORGANIZING	196,040	16,337	8,859	7,477
38	Conference - Organizing	100	8	-	8
39	Rally / Bus Rental-Organizing	-	-	-	-
40	Memorabilia / Give Away-Org	25,000	2,083	-	2,083
41	Meeting - Organizing	2,548	212	3,368	(3,155)
42	Donation - Organizing	2,960	247	-	247
43	SEIU Int'l share cost	360,000	360,000	360,000	-
44					
45	Total Expenses	4,306,390	673,570	502,373	171,198
46					
47	Net Income	(281,218)	(338,139)	(166,942)	171,198

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SEIU Local 521  
Per Capita Analysis by Region

	A	B	C	D	E	F	G	H	I	J	K	L	R
REGION 1													
1	County	Office	B	C		Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	AVERAGE
2	SCC	SJC	12	M	Achievekids	93							93
3	SCC	SJC	12	A	Achievekids - Agency	1							1
4	SCC	SJC	12	M	American Red Cross Blood Services Northern	50							50
5	SCC	SJC	12	A	American Red Cross Blood Services Northern	-							-
6	SCC	SJC	12	M	Campbell Union High School District	-							-
7	SCC	SJC	12	A	Campbell Union High School District - Agency	-							-
8	SCC	SQL	26	M	City of East Palo Alto	20							20
9	SCC	SQL	26	A	City of East Palo Alto - Agency	12							12
10	SMC	SQL	26	M	City of Menlo Park	81							81
11	SMC	SQL	26	A	City of Menlo Park - Agency	182							182
12	SCC	SQL	26	M	City of Mountain View	110							110
13	SCC	SQL	26	A	City of Mountain View - Agency	40							40
14	SCC	SQL	26	M	City of Palo Alto	389							389
15	SCC	SQL	26	A	City of Palo Alto - Agency	248							248
16	SMC	SQL	26	M	City of Redwood City	229							229
17	SMC	SQL	26	A	City of Redwood City - Agency	10							10
18	SMC	SQL	26	M	City of San Mateo	99							99
19	SMC	SQL	26	A	City of San Mateo - Agency	79							79
20	SCC	SQL	26	M	City of Sunnyvale	33							33
21	SCC	SQL	26	A	City of Sunnyvale - Agency	7							7
22	SCC	SJC	26	M	Community Solutions	86							86
23	SCC	SJC	26	A	Community Solutions - Agency	50							50
24	SMC	SQL	26	M	County - San Mateo	728							728
25	SMC	SQL	26	A	County - San Mateo - Agency	724							724
26	SCC	SJC	26	M	County - Santa Clara	8,062							8,062
27	SCC	SJC	26	A	County - Santa Clara - Agency	995							995
28	SMC	SQL	26	M	Court - San Mateo County	127							127
29	SMC	SQL	26	A	Court - San Mateo County - Agency	40							40
30	SCC	SJC	26	M	Court - Santa Clara County	529							529
31	SCC	SJC	26	A	Court - Santa Clara County - Agency	8							8
32	SCC	SJC	12	M	Cupertino Union School District	55							55
33	SCC	SJC	12	A	Cupertino Union School District - Agency	18							18
34	SCC	SJC	26	M	Gardner Family Care Corporation	122							122
35	SCC	SJC	26	A	Gardner Family Care Corporation - Agency	11							11
36	SCC	SJC	24	M	Hope Services	83							83
37	SCC	SJC	24	A	Hope Services - Agency	84							84
38	SCC	SJC	26	M	Housing Authority of the County of Santa Clara	53							53
39	SCC	SJC	26	A	Housing Authority of the County of Santa Clara - Agency	12							12
40	SCC	SJC	26	M	Humane Society of Silicon Valley	13							13
41	SCC	SJC	26	A	Humane Society of Silicon Valley - Agency	16							16
42	SCC	SJC	24	M	Law Foundation of Silicon Valley	51							51
43	SCC	SJC	24	A	Law Foundation of Silicon Valley - Agency								

SEIU Local 521  
Per Capita Analysis by Region

	A	B	C	D	E	F	G	H	I	J	K	L	R						
2	County	Office	B	C	D	Jan-14							Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	AVERAGE
44	SCC	SJC	24	A	Law Foundation of Silicon Valley - Agency	2												2	
45	SCC	SJC	24	M	MACSA, Inc	-												-	
46	SCC	SJC	26	M	Momentum for Mental Health	234												234	
47	SCC	SJC	26	A	Momentum for Mental Health - Agency	9												9	
48	SCC	SJC	12	M	Morgan Hill Unified School District	-												-	
49	SCC	SJC	12	A	Morgan Hill Unified School District - Agency	-												-	
50	SCC	SJC	12	M	Orchard School District	-												-	
51	SCC	SJC	12	A	Orchard School District - Agency	-												-	
52	SMC	SQL	12	M	Peninsula Jewish Community Center	61												61	
53	SCC	SJC	26	M	Rebekah Children's Services	67												67	
54	SCC	SJC	26	A	Rebekah Children's Services - Agency	2												2	
55	SCC	SJC	12	M	San Andreas Regional Center	190												190	
56	SCC	SJC	12	A	San Andreas Regional Center - Agency	20												20	
57	SCC	SJC	12	M	Santa Clara COE	787												787	
58	SCC	SJC	12	A	Santa Clara COE - Agency	514												514	
59	SCC	SJC	26	M	Santa Clara Valley Transportation Authority	251												251	
60	SCC	SJC	26	A	Santa Clara Valley Transportation Authority	5												5	
61	SCC	SJC	24	M	Starlight Community Services	59												59	
62	<b>REGION 2</b>																		
63	SBC	SNS	24	M	Chamberlain's Children Center	37												37	
64	SBC	SNS	24	A	Chamberlain's Children Center - Agency	1												1	
65	MRY	SNS	26	M	CHSPA Housing Management Inc	28												28	
66	MRY	SNS	26	M	City of Greenfield	14												14	
67	MRY	SNS	26	A	City of Greenfield - Agency	-												-	
68	SBC	SNS	26	M	City of Hollister	34												34	
69	SBC	SNS	26	A	City of Hollister - Agency	5												5	
70	MRY	SNS	26	M	City of King City	8												8	
71	MRY	SNS	26	A	City of King City - Agency	4												4	
72	MRY	SNS	12	M	City of Salinas	85												85	
73	MRY	SNS	12	A	City of Salinas - Agency	111												111	
74	SCR	SCR	26	M	City of Santa Cruz	448												448	
75	SCR	SCR	26	A	City of Santa Cruz - Agency	180												180	
76	SCR	SCR	12	M	City of Scotts Valley	21												21	
77	SCR	SCR	12	A	City of Scotts Valley - Agency	-												-	
78	MRY	SNS	26	M	City of Soledad	30												30	
79	MRY	SNS	26	A	City of Soledad - Agency	-												-	
80	SCR	SCR	24	M	City of Watsonville	50												50	
81	SCR	SCR	24	A	City of Watsonville - Agency	3												3	
82	MRY	SNS		M	Clinica de Salud del Valle de Salinas	-												-	
83	SCR	SCR	12	M	Community Bridges	102												102	
84	SCR	SCR	12	A	Community Bridges - Agency	13												13	
85	MRY	SNS	12	M	County - Monterey	2,082												2,082	

SEIU Local 521  
Per Capita Analysis by Region

	A	B	C	D	E	F	G	H	I	J	K	L	R
2	County	Office	B	C	D	Jan-14 Feb-14 Mar-14 Apr-14 May-14 Jun-14 Jul-14							AVERAGE
86	MRY	SNS	12	A	County - Monterey - Agency	617							617
87	SBC	SNS	26	M	County - San Benito	126							126
88	SBC	SNS	26	A	County - San Benito - Agency	91							91
89	SCR	SCR	26	M	County - Santa Cruz	1,428							1,428
90	SCR	SCR	26	A	County - Santa Cruz - Agency	81							81
91	MRY	SNS	12	M	Court - Monterey County	88							88
92	MRY	SNS	12	A	Court - Monterey County - Agency	38							38
93	SBC	SNS	26	M	Court - San Benito County	11							11
94	SBC	SNS	26	A	Court - San Benito County - Agency	10							10
95	SCR	SCR	26	M	Court - Santa Cruz County	89							89
96	SCR	SCR	26	A	Court - Santa Cruz County - Agency	2							2
97	MRY	SNS	12	M	Housing Authority of the County of Monterey	54							54
98	MRY	SNS	12	A	Housing Authority of the County of Monterey	4							4
99	MRY	SNS	26	M	MAOF	86							86
100	MRY	SNS	26	A	MAOF - Agency	3							3
101	MRY	SNS	26	M	Monterey Bay Unified Air Pollution Control	26							26
102	MRY	SNS	12	M	MV Public Transportation	99							99
103	SCR	SCR	26	M	Salud Para la Gente Inc	119							119
104	SCR	SCR	26	A	Salud Para la Gente Inc - Agency	1							1
105	SBC	SNS	26	M	San Benito County Water District	13							13
106	SCR	SCR	12	M	San Lorenzo Valley Unified School District	95							95
107	SCR	SCR	12	A	San Lorenzo Valley Unified School District - A	9							9
108	SCR	SCR	12	M	Santa Cruz Community Counseling Center	70							70
109	SCR	SCR	12	A	Santa Cruz Community Counseling Center - A	17							17
110	SCR	SCR	26	M	Santa Cruz County Regional Transportation C	12							12
111	SCR	SCR	26	A	Santa Cruz County Regional Transportation C	-							-
112	SCR	SCR	26	M	Santa Cruz Metro	96							96
113	SCR	SCR	26	A	Santa Cruz Metro - Agency	2							2
114	SCC	SCR	12	M	Soquel Creek Water District	14							14
115	SCR	SCR	12	M	Womens Crisis Support-Defensa de Mujeres	19							19
116	SCR	SCR	26	M	YWCA of Watsonville	12							12
117	<b>REGION 3</b>												
118	MAR	FAT	12	M	County - Mariposa	143							143
119	MAR	FAT	12	A	County - Mariposa - Agency	73							73
120	STA	FAT	26	M	County - Stanislaus	412							412
121	STA	FAT	26	A	County - Stanislaus - Agency	86							86
122	TUO	FAT	24	M	County - Tuolumne	14							14
123	MAR	FAT	12	M	Court - Mariposa County	7							7
124	MAR	FAT	12	A	Court - Mariposa County - Agency	-							-
125	MER	FAT	26	M	Golden Valley Health Center	427							427
126	MER	FAT	26	A	Golden Valley Health Center - Agency	9							9
127	STA	FAT	12	M	Salida Union School District - Headstart	29							29

SEIU Local 521  
Per Capita Analysis by Region

	A	B	C	D	E	F	G	H	I	J	K	L	R						
2	County	Office	B	C	D	Jan-14							Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	AVERAGE
128	STA	FAT	12	A	Salida Union School District - Headstart - Ag	5							5						
129					<b>REGION 4</b>														
130	FAT	FAT	24	M	Central California Legal Services	41							41						
131	FAT	FAT	26	M	City of Coalinga	25							25						
132	FAT	FAT	26	A	City of Coalinga - Agency	2							2						
133	MAD	FAT	26	M	Community Action Partnership of Madera	73							73						
134	MAD	FAT	26	A	Community Action Partnership of Madera -	35							35						
135	FAT	FAT	26	M	County - Fresno	2,673							2,673						
136	FAT	FAT	26	A	County - Fresno - Agency	1,268							1,268						
137	MAD	FAT	12	M	County - Madera COMPA	59							59						
138	MAD	FAT	12	M	County - Madera SEMC	25							25						
139	FAT	FAT	26	M	Court - Fresno County	232							232						
140	FAT	FAT	26	A	Court - Fresno County - Agency	39							39						
141	FAT	FAT	12	M	Dental Source	3							3						
142	FAT	FAT	12	M	FASTA	-							-						
143	FAT	FAT	12	A	FASTA - Agency	4							4						
144	FAT	FAT	26	M	First Student	214							214						
145	FAT	FAT	24	M	Fresno Housing Authority	89							89						
146	FAT	FAT	24	A	Fresno Housing Authority - Agency	33							33						
147	FAT	FAT	12	M	Fresno Unified School District	58							58						
148	FAT	FAT	12	A	Fresno Unified School District - Agency	28							28						
149	FAT	FAT	12	M	Riverdale Unified School District	49							49						
150	FAT	FAT	12	A	Riverdale Unified School District - Agency	9							9						
151					<b>REGION 5</b>														
152	KER	BFL	26	M	Bear Valley Community Services District	24							24						
153	KER	BFL	26	A	Bear Valley Community Services District - Ag	1							1						
154	KER	BFL	26	M	City of Arvin	20							20						
155	KER	BFL	26	A	City of Arvin - Agency	-							-						
156	KER	BFL	26	M	City of Bakersfield	509							509						
157	KER	BFL	26	A	City of Bakersfield - Agency	212							212						
158	KIN	HJO	26	M	City of Hanford	112							112						
159	KIN	HJO	26	A	City of Hanford - Agency	22							22						
160	TUL	VIS	26	M	City of Lindsay	5							5						
161	KER	BFL	26	M	City of Shafter	12							12						
162	KER	BFL	26	M	City of Taft	12							12						
163	KER	BFL	26	A	City of Taft - Agency	1							1						
164	KER	BFL	26	M	City of Wasco	37							37						
165	KER	BFL	26	A	City of Wasco - Agency	8							8						
166	KER	BFL	26	M	Community Action Partnership of Kern	271							271						
167	KER	BFL	26	A	Community Action Partnership of Kern - Age	45							45						
168	KER	BFL	26	M	County - Kern	2,884							2,884						
169	KER	BFL	26	A	County - Kern - Agency	2,201							2,201						

SEIU Local 521  
Per Capita Analysis by Region

	A	B	C	D	E	F	G	H	I	J	K	L	R
2	County	Office	B	C	D	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	AVERAGE
170	KIN	HJO	26	M	County - Kings	23							23
171	TUL	VIS	26	M	County - Tulare	821							821
172	TUL	VIS	26	A	County - Tulare - Agency	511							511
173	KER	BFL	26	M	Court - Kern County	246							246
174	KER	BFL	26	A	Court - Kern County - Agency	86							86
175	KIN	HJO	26	M	Court - Kings County	53							53
176	KIN	HJO	26	A	Court - Kings County - Agency	1							1
177	TUL	VIS	26	M	Court - Tulare County	154							154
178	TUL	VIS	26	A	Court - Tulare County - Agency	16							16
179	KER	BFL	12	M	Edison Elementary School District	18							18
180	KER	BFL	26	M	Kern County Water Agency	23							23
181	KER	BFL	26	A	Kern County Water Agency - Agency	27							27
182	KER	BFL	26	M	Kern Regional Center	145							145
183	KER	BFL	26	A	Kern Regional Center - Agency	8							8
184	KIN	HJO	26	M	Kings Community Action Organization	22							22
185	TUL	VIS	24	M	Lindsay-Strathmore Irrigation District	2							2
186	KER	BFL	26	M	Public Cemetery District #1	3							3
187	KER	BFL	26	A	Public Cemetery District #1 - Agency	-							-
188	KER	BFL	12	M	Standard School District	46							46
189	SBA	VIS	12	M	Student Transportation of America	33							33
190	KER	BFL	12	M	Taft Union High School District	22							22
191					<b>REGION 6</b>								
192	SMC	SQL	24	M	Addus Healthcare Inc.	31							31
193	SMC	SQL	24	A	Addus Healthcare Inc. - Agency	-							-
194	SMC	SQL	12	M	IHSS San Mateo	1,919							1,919
195	SMC	SQL	12	A	IHSS San Mateo - Agency	1,276							1,276
196	SCC	SJC	12	M	IHSS Santa Clara	7,946							7,946
197	SCC	SJC	12	A	IHSS Santa Clara - Agency	7,082							7,082
198	SCC	SJC	26	M	Institute on Aging/Older Adults Care Manag	142							142
199	SCC	SJC	26	A	Institute on Aging/Older Adults Care Manag	17							17
200	SCC	SQL	12	M	Pathways Continuous Care	83							83
201	SCC	SQL	12	A	Pathways Continuous Care - Agency	46							46
202					<b>REGION OTHER</b>								
203	SCC	SJC		M	Child Care Providers United California	381							381
204	SCC	SJC	26	M	Local 521 Staff & Officers	35							35
205	SCC	SJC	12	M	Retired Members Chapter (521)	828							828
206													
207					<b>Total Members</b>	<b>39,493</b>							<b>39,493</b>
208					<b>Total Agency Fee Payers</b>	<b>17,432</b>							<b>17,432</b>
210					<b>Total Count</b>	<b>56,925</b>							<b>56,925</b>

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# SEIU Local 521 Budget and Finance Committee Motion

Item Number: 01

Date: March 19, 2014

**Motion Title:** Consent Agenda for Financial Statements

**Recommended By:** RoseAnn Dominguez, SEIU Local 521 Treasurer

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

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

## January 2014 Financials – New Format

Bank Balances – Document 1 - (pages 9-10)

Income Statement – Document 2 - (pages 11-14)

Organizing Income Statement – Document 3 - (pages 15-16)

Dues Receipts – Document 4 - (pages 17-20)

Per Capita Report – Document 5 - (pages 21-24)

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

### Follow Up:

Moved by: Moussed Second: Secordsd

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

Signatures



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# SEIU Local 521 Budget and Finance Committee Motion

Item Number: 02

Date: March 19, 2014

**Motion Title:** Approval to Increase the Service Fee Rebate Amount each Month Retro back to January 1, 2014

**Recommended By:** Ming Lee, Financial Director

**Background:** This year the total request for service fee rebates (the difference between the fees paid and the fair share amount) exceeded the amount set aside by approximately \$163,000. Since it is vital to set aside at least as much as the repayment amount request, Ming asked that the monthly set aside be increased from \$42,000 to \$60,000 retro back to January 1, 2014.

**Motion:** To approve increasing the set aside amount for service fee rebate request from \$42,000 per month to \$60,000 per month retro back to January 1, 2014.

**Follow Up:**

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Moved by: Moved Second: Second

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**



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# SEIU Local 521 Budget and Finance Committee Motion

Item Number: 03

Date: March 19, 2014

**Motion Title:** Bakersfield Office Downstairs Remodel

**Recommended By:** Pam Rodgers, Administrative Director

**Background:** This motion was discussed at the February 19, 2014, Budget and Finance Meeting, and the members asked that more work be done on the motion and it be brought back requesting approval at the March 19, 2014 meeting.

Debbie Pate received bids for the remodel of the old gym, "The Sweatshop" and the old conference rooms on the bottom floor of the building that the Local owns in Bakersfield. Attached are the three bids for each of the following remodeling components: painting; stripping and refinishing the cement floor; and replacing blinds. No improvements have been made to the gym or conference rooms since their construction in the 1980s.

Basic estimates of the three bids received are approximately \$4500.00 - \$6000 for painting of both conference rooms and the two restrooms in the old gym, \$3000.00 for blinds, and \$8150.00 - \$13,900.00 to completely strip all carpet from both rooms, scrape glue off cement, smooth and texture cement, stain, finish and replace baseboard. I would recommend the mid-range bids of:

Master Custom Painting	\$5,385 – for painting
Hawley's Design	\$2,690 – for the blinds
Cade Construction	\$9,450 – for the floor work

There is a shortage of tables and space in both conference rooms, it will be necessary to purchase "penny tables", thin tables which take up less space. Purchase of 12 penny tables and cart is \$1400.00.

Costs of the recommended work, tables and cart plus 10% contingency would be \$20,817.50.

24,000 -  
~~20,817.50~~

**Motion:** To approve spending up to ~~\$20,817.50~~ 24,000 for the remodel of the Bakersfield Office Downstairs from the Building Fund. The work would be done by the following contractors in accordance with their bids: Master Custom Painting \$5,385 bid on 2/18/2014, Hawley's Design \$2,690 bid on 2/10/2014, and Cade Construction \$9,450 bid on 2/19/2014.

**Follow Up:**

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Moved by: Moved Second: Second

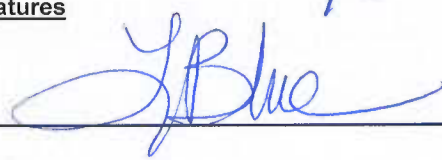
Amendment: amended to \$24,000 -

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: 1 - Cheryl Easterbrook Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

Signatures



BIDS FOR BAKERSFIELD OFFICE DOWNSTAIRS REMODEL

		High	Middle	Lowest
<b>FLOORING</b>				
	Steve Holloway Painting Contractor Citywide Sevices	11,500.00 <u>2,375.00</u> 13,875.00		8,150.00
	<b>CADE Construction</b>		<b>9,450.00</b>	
	Complete Concrete			
<b>PAINTING</b>				
	Steve Holloway Painting Contractor	6,100.00		4,000.00
	<b>Master's Custom Painting</b>		<b>5,385.00</b>	
	Larry Murphy Painting			
<b>BLINDS</b>				
	Budget Blinds Blinds and More	3,012.08	2,882.00	
	<b>Hawley's Window Coverings</b>			<b>2,690.00</b>

My personal recommendation are highlighted.

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## **Region 1 Officer and Delegates Meeting**

March 12, 2014, Union Office - Training Room

**Purpose:** Coordinate across Region 1 to strengthen our union

### **Outcomes:**

- Learn progress and challenges from large and small chapters
- Explore and determine if the group wishes create member leader to member leader mentorship program
- Determine if we want regular Region 1 meetings and, if so, make a schedule

### **Agenda:**

1. Welcome, Agenda Review, and Ground-rules (5 min)
2. Open Comment and/or Reports (10 min)
3. Start discussion on mentorship program pilot (45 min)
  - a. What would be right purpose of the mentorship program pilot?
  - b. What would be outcomes we would want to achieve with the mentorship program pilot to measure our success?
  - c. What steps can we take to start building this program?
  - d. Assignments and next steps
4. Regular Region 1 meetings Schedule (10 min)

### **Reports from Attendees**

- Lori Niepoth – Santa Clara County, Social Services Agency, Department of Family and Children Services – Receiving Center – Many of the Children Shelter workers are watching closely on what the County plans to do in the long run with the receiving center. There are indications that the County wants to phase out the receiving center and possibly have an outside agency perform those tasks. Talks about the receiving center have been a regular item at the County's Child Abuse Council meetings.
- Cheryl Easterbrook –
  - o Redwood City – Members are presently in contract negotiations and they have been described as moving slowly. Cheryl identified contracting out as a growing issue at the City as it appears that the City has accelerated the contracting out to contractors.

### **Peer to Peer Mentorship Pilot Program Discussion:**

- Pilot Program's Purpose: To successfully mentor a new and younger generation of union leadership to help take the place of retiring leadership
- Common Description of Mentorship:
  - o Providing regular and reliable support
  - o Providing guidance and leadership
  - o Helping to build up confidence and help new/existing leader be successful
  - o Making the time, even personal time, to be there for someone you are mentoring
- Next steps to help identify the outcomes: Hold 2 focus groups to shape up the outcomes of the pilot program. Hold 1 in San Jose and 1 in San Carlos. We will invite generally all stewards to the meeting, but will ensure we have a minimum of 20 in San Jose and 10 in San Carlos.

### **Action:**

1. Robert will request admin to obtain an excel file containing the names of the chapter leaders for each region 1 small chapter to create a distribution list by March 28, 2014. Clarify usage rules for distributing personal information regarding leaders.

2. Robert will request admin to build list of all key chapter meetings by March 28, 2014.
3. Muriel will set up two focus groups to explore and develop a member to member mentorship program by April 12. We will avoid April 10.

### **SANTA CLARA COUNTY CHAPTER**

- Community First
  - Wage realignments – Years of budget deficits created severe staffing challenges which have caused real consequences for the community we serve. Some County departments have experienced trouble recruiting and retaining qualified workers leading to delayed care and mandatory overtime. Our Community First Organizing Committee, formed back in November 2013, recently achieve some substantial wage realignments on March 11 that brings many job series in line with the competitor’s wage average in the market place. Our efforts required weekly organizing committee meetings, regular worksite organizing, and advocacy with the County and Board of Supervisors. We are certain that our achievements will put community first by affording the County a stronger retention tool to keep experienced staff at the County. We will continue our efforts into the next full contract bargaining in 2015 to help close the talent gap and put the County back on the pathway to being a number one in delivery of services.
  - Contract Action Team – The Community First Contract Action Team is back and moving along full steam ahead to building real relationships to put community first. Our first community activity we will be supporting is the March of Dimes on April 26, 2015, where our goal is to reach \$521 in contributions. This is part of our larger effort to build long term community alliances to help us improving public service.
  - Covered CA event – Our EW industry council and Health Care Reform member committee are supporting a joint SEIU 521 and County Health Care event on March 29 from 11-3pm in effort to help enroll residents onto the health care exchange and access many other vital services to help uplift residents. We presently have 9 member volunteers to help support the event. Additionally, we have sponsorship from Supervisor Cortese, Councilperson Chu, County HHS, County SSA, Silicon Valley Council of Nonprofits, Asian Americans for Community Involvement, United Way, and many other organizations. The day will allow us to not only build relationships with partners, but also interact with day to day community members while highlighting the very valuable services our members provide.
  - Purple Trains – We purple train is back. The year 2014 brings many opportunities and challenges. The top priorities of the local: 1) Retirement Security, 2) Organizing Childcare, 3) Local/State Elections, 4) Health Reform, and, 5) new Revenues, need to be shared with the rest of the membership. Using the fun and excitement of the purple train, we have set out to educate majority of our membership on these five issues, which started back in February.
- Non Profit
  - Unity Council – After being on hiatus for 2 years, the unity council reconvened on March 4, 2014 of this month to get nonprofits back on track with collaborating and sharing resources to improve nonprofit services.
  - Humane Society – We are entering into Contract talks with Human Society. The contract is set to expire at the end of May 2014



SEIU Local 521 – Region 2 Vice President’s Report  
March 15, 2014

Here are some of the highlights from Region 2.

\* We have finally settled the contract in San Benito County. As I reported at the last officers’ meeting, the County Board of Supervisors had voted to impose a “last best and final” offer on our members that was actually worse than their last, best and final offer. After a meeting with the membership in San Benito County, a plan was devised to revive a previous mediated settlement offer that was not great, but much better than what the county was threatening to impose. So we have a contract, and we will be beginning negotiations soon on the contract for the coming fiscal year.

\* We also finally have a contract at the Monterey Bay Air Quality Management District. It is a 2 year contract expiring June 2015 with 3% retro to 7/1/13 and 2% on 7/1/14. Employee will contribute 2% towards PERS by the end of the contract. We also can now arbitrate lay off and have a pilot expedited arbitration process.

\* On March 25 we will be holding our first meeting of a Community First Coalition in Salinas to fight to preserve Natividad Hospital and the services it provides as the county considers various forms of merger and affiliation for the two hospitals in Salinas. This is a key struggle to make sure public hospitals persist and the health care needs of working families are addressed. SEIU 521 and the Labor Council are playing a key role in convening this coalition.

\* Ben Franklin, the Chapter president of our largest chapter in Region 2 (Monterey County) just announced his resignation as president,, due to the fact that he has been promoted out of the bargaining unit.

\* We are actively engaged in evaluating candidates for the upcoming June 2014 elections. We held candidate forums for Santa Cruz County (March 11) and Monterey County (March 17).

\* Ray Montemayor (City of Salinas) and Jeffrey Smedberg (County of Santa Cruz) were both elected to the Monterey Bay Central Labor Council Executive Board as representatives from SEIU Local 521.

\* On December 14 we held a Region 2 Leadership retreat, attended by about 20 leaders and staff from our three counties, and our CEO Luisa Blue. We used the event to review some of the lessons we had learned from a grueling year of bargaining in 2013, to review the 5 political priority goals for 2014, and to focus on a plan to strengthen our steward and leadership structure in our chapters in the region. The resulting plan will be reviewed at the March 2014 executive board meeting.

Respectfully submitted,  
Matt Nathanson, SEIU Local 521, Region 2 VP

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## Region 3

### **Stanislaus County:**

Chapter would like higher wages in the next contract. They are working to organize members and establish and build a CAT team. In Stanislaus County there are no union friendly members on the Board of Supervisors.

### **Golden Valley Health Centers:**

The GVHC members would like to have a reopener to ask for fair raises which will occur in 2 or 3 years. The chapter's political plan is to review the retirement plan for its members and to look at supporting implantation of AB123.

### **Salida Union School District, Head start:**

2014 contract to bargain for wage increase.

### **Tuolumne County:**

The Tuolumne County chapter is working with membership for elections.

## Region 4

### **Fresno County**

Fresno County chapter continues to work on its community action campaign to bring awareness to the community regarding the Board of Supervisors imposition; leaving the members with a 9%+ pay cut. Members successfully won the fight and avoided the Unit 2 decert effort. Member leaders are looking at organizing fee payers and developing its member leaders. The chapter's political goals include changing the face of the BOS in the County of Fresno. We will be phone banking for the next few months for the BOS races.

The newly elected leaders of Fresno County continue to fight for the membership and are working to get the County back to the table to negotiate a fair agreement for our members.

### **Fresno Substitute Teachers Association**

Members at FASTA are looking at building their chapter and keeping their members informed of the upcoming Board Race.

### **Central California Legal Services**

Members and leaders have successfully negotiated a MOU 2013 – 2015. The CCLS membership is 100%. Great Job!

### **First Student Bus Services**

Leaders would like to have more worksite actions to increase participation. At these actions member leaders will handout current contracts to keep members informed and to increase communication.

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# Region 5 Report

February, 2014

## César Chávez Day !

Monday, March 31, 2014

Happy Holidays  
from SEIU 521!

Please note that the  
Union offices will be closed in  
observance of this holiday.



### 2014's Quarterly All Chapters' Meetings:

- Thursday, January 30, 2014
- Thursday, April 24, 2014
- Thursday, July 31, 2014
- Thursday, October 30, 2014

All Chapters' Meetings are held at:  
SEIU Local 521 Bakersfield Office  
1001 17th Street from 5:30-7pm.

Please RSVP: (661) 321-4161

## All Chapters of Region 5

- ☑ Fast for Families Campaign strolled through Region 5 where Mr. Harris was a guest speaker.
- ☑ "Gapbusters" SEIU Child Care Bus Tour: We played a major role in this campaign as being a part of the support team, providing speakers and media.
- ☑ Region 5 is proudly promoting the Cesar Chavez Motion Picture Screening for its opening on March 28, 2014.

## Kern County News:

- Kern County: DHS - Eligibility Workers traveled to Sacramento to speak with legislators during the ACA Lobbying regarding the Eligibility Workers' needs for more funding.
- In February, we attended Kern County Employee Retirement Association (KCERA) meeting to discuss the Supplemental Retiree Benefit Reserve (SRBR). We are currently working on putting a stop on two bills: AB 2473 and SB 1056 . Then we'll have the County meet with us to form a committee to discuss the issue.
- KMC Update: In less than 2 months, the CEO went from saying no layoffs and working with members to saying there will be cuts and it's going to hurt before it gets better. He also got a raise from \$7 million to \$11.2 million.

## Kings County News:

- Kings Courts members attended the Judicial Council Meeting of the Administrative Office of the Courts (AOC) and lobbied for more Court funding and the reduction of Furloughs for employees.
- Kings Courts members have an upcoming meet and confer with management to attempt to reduce to reduce the number of furloughs for the current fiscal year.
- KCAO ratified their new union contract with 100% support. The Contract includes improvements to vacation and dental/vision insurance. Also there are improved union access rights.

## Tulare County News:

- Tulare County Bargaining Team Elections were held. First negotiations date set with the County for March 19, 2014.  
The theme for this year's negotiations: **Team Tulare County: Community First**
- City of Lindsay Chapter rejected Management's Last Best and Final Offer and requested Mediation.
- Tulare County Eligibility Workers attended an ACA Lobby in Sacramento and got to talk with Legislators about the need for more funding for Eligibility Workers.
- Tulare Courts members attended the Judicial Council Meeting of the AOC and lobbied for more funding for their courts.

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## **Education & Training Report**

by Beth Thomas, Director

The 2014 Steward Trainings have begun with improved attendance in several areas and averaging fifteen participants per monthly regional training session (total for Jan/Feb is 148 participants). Internal Organizing Directors have met together to begin working on ideas for improving steward development in all regions and with CED to map out how stewards will interact with CED in all regions to further develop stewards who can carry the ball in enforcing the contract in their areas while maintaining L521 legal obligations of representation. These conversations will continue. Region 2 has presented a Steward Development plan as part of their regional plan which will help to move these goals in their area and which other regions of the local will consider when developing their steward development plans.

All staff, including CWA, OPEIU and Sr staff, met together for 6 hours on January 30 to receive information and education on the work that will be done local wide in 2014. Presentations were made on the 5 Priority Campaigns for 2014, Harris v Quinn - and the IHSS campaign, Covered CA grant and our work with these educational events. In addition, IO directors and Leads led a training component on converting fee payers to members - necessary for the upcoming membership drives in each of the local's regions.

All-staff meetings such as this are planned to take place every other month going forward to continue to share information and training on the continuing work of the local. Our next meeting is scheduled for March 28.

*Beth Thomas, Director  
Education and Training  
and Human Resources  
SEIU Local 521*

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# **February Organizing Report**

**By: Catherine Balbas**

## **All in for Child Care**

The beginning of 2014 has been focused on member development. Child Care providers participated in a Teletownhall, led by various leaders including Luisa Blue, on the state of the budget and Governor Brown's proposal for Early Education. Much of 2014 will also be focused on bringing awareness to local communities on the impact of child care and the need to pass AB641 to grant providers the right to collectively bargain.

The kick off to the public campaign took place with the "Gapbusters" Bus Tour under the "Raising California" Coalition that has been formed at part of the Child Care campaign. 521 Child Care providers and parents joined providers around the State on a seven stop tour of California to highlight the need for Early Education investment. Representatives of 50 local, state, and national organizations took part in the event including the Superintendent of Public Instruction Tom Torlakson and Assemblymember Anthony Rendon, author of our child care bill AB641. The call was made by various leaders for Governor Brown to invest in early learning by 1) passing AB641 and 2) increasing funding for the system. The bus tour ended with a large Rally in Sacramento where Luisa Blue and various providers spoke about their experiences and the need to invest in the system."

Check out Luisa's blog: <http://raisingcaliforniatogether.org/2014/03/busting-achievement-gap/>

## **Tulare County Unit 2**

The United Auto Workers walked away from Unit 2 in Tulare County on June 30, 2013. Upon learning of this, we assembled a team of organizers and moved a petition for recognition. As this is public sector, it is subject to card check recognition if a majority of workers sign the petition. We filed for recognition with a majority of the unit (61%) on the petition. The Teamsters subsequently filed an intervening petition which would have triggered an election between the two unions. We have asked Change to Win to intervene and make a decision as to jurisdiction. Previous attempts to schedule arbitration on this matter have been unsuccessful due to scheduling conflicts. The current dates set for arbitration are March 17 and March 18, 2014.

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## Communications Department March 2014 Executive Board Report

### **Community First**

Formalizing the model of the Community First messaging framework that drove the contract campaigns in Santa Clara County and for Home Care. The plan is to share the framework with all Chapters in Local 521, in particular the ones that have contracts opening up with an opportunity to engage and outreach to the community.

### **Every Hour Counts [Statewide In-Home Supportive Services]**

Providing communications assistance to the statewide campaign to defeat Gov. Brown's plan to avoid paying IHSS home care providers overtime pay by capping workers hours. We collected five stories of Santa Clara County home care workers whose hours would be cut under the governor's plan. Our message to the governor is that the hours cap will be devastating to home care workers and their families (many will lose their homes), and that interrupting continuity of care is bad for the clients for whom they care.

The stories were collected as part of a "family photo album" that was used as a leave-behind for lobbying visits with members of the General Assembly in Sacramento.

### **Retirement Security for All**

Communications and political staff travelled to Los Angeles on Feb. 24-25 to take part in strategy and communications coordination meetings. We are moving forward with other locals from around the state in developing communications materials and preparing for lobbying efforts in Sacramento and before the CALPERS board over the next year.

## **Local Campaigns**

### **Community First @ Kern Medical Center**

Advancing our "Community First" message through upcoming March 29 health fair at Kern Medical Center, in conjunction with the county. Continuing to educate membership and community organizations to come together to preserve and strengthen the public hospital which is being targeted for privatization or other options.

We have collected 80 numbers for texting and 522 emails. Members are receptive to the message and getting ready to move.

### **Invest in Fresno**

Research created a series of graphs and communications wrote speeches and talking points for a presentation on how County Worker wages haven't kept pace with inflation.

<http://www.seiu521.org/2014/02/hackett-investinfresno/>

### **Quality Care @ Home [In-Home Supportive Services]**

In Santa Clara County, home care workers won a new contract with the IHSS Public Authority that provides a modest salary increase over three years. This was an 11th hour deal struck on the eve of what would have been a major escalation in the campaign, where home care providers and union supporters were prepared to be arrested committing acts of civil disobedience.

Speeches and talking points with a defiant tone were prepared for delivery before the board, including a speech to be delivered Local 521 Chief Elected Officer Luisa Blue. Once a deal was reached, communications materials including all speeches and talking points were revised to reflect our appreciation to the board. A new press release was sent to the media, explaining that an agreement had been reached and that acts of civil disobedience had been cancelled.

A joint press release was coordinated with the Board of Supervisors, and communications shifted to preparing our home care members for the ratification vote. The contract win was including as a victory in the February local-wide member newsletter. Earned media coverage.

### **City of Palo Alto**

Negotiators from the city broke impasse and were able to hash out a new proposal through three-on-three sidebar meeting. The chapter negotiating team supported the new proposal and it was ratified by the membership on March 5.

Our messaging on the contract is that the new proposal is a “step in the right direction” and provides workers with immediate relief, however it doesn’t do enough to solve Palo Alto’s hiring and retention crisis. A press release with a statement by Chapter Chair Margaret Adkins, was released and the full quote appeared in the Palo Alto Weekly, the Palo Alto Daily News, and the website of the San Jose Mercury News (the Daily News’ parent company). A blog post has been posted on the website and communicated out to members and the public through social media. Earned media coverage.

### **The Purple Buzz**

Purple Buzz, our local-wide newsletter sent out on Feb. 27 to 36K+ email addresses, opened by 11.9%, with 26 unsubscribes.

This e-newsletter included:

- Quiz about retirement to highlight retirement security crisis we face.
  - Victory for our home care workers, around the campaign topic of "Quality Care @ Home"
  - Promotion of our next health fair in Fresno (March 22)
  - Child care gapbusters bus tour
  - Endorsement Town hall in Fresno on Feb. 13 (BOS)
  - CED victory in Monterey County for union activists
- and more

## **Palo Alto reaches labor deal with largest union**

### **New contract with SEIU includes salary raises, health care reforms**

By Gennady Sheyner  
Palo Alto Weekly  
Mar. 5, 2014

The labor standoff between the City of Palo Alto and its largest employee union concluded this week when workers voted to accept an offer that raises salaries and aligns local positions with market rates.

The agreement, which the City Council is scheduled to approve on March 17, applies to the 570 employees represented by the Service Employees International Union, Local 521 – about half of the city's workforce. Members of the union voted on Tuesday to accept the city's proposal, which includes a 4.5 percent raise for every employee over two years. This includes a 2 percent cost-of-living adjustment upon adoption of the contract and another 2.5 percent in the second year of the contract.

In addition to the 4.5 percent raise, more than half of the SEIU workforce will see salary increases as part of the city's effort to align local salaries with those in other jurisdiction. The city had recently completed a compensation study that compared local salaries with those in 12 comparable jurisdictions. As part of the realignment, 89 job classifications representing about 315 workers will see upward adjustments, according to the city.

The agreement will also shift some of the risk in rising medical costs from the city to the workers. While the city currently pays 90 percent of the employees' health care costs (an amount that can go up significantly as medical premiums rise), the new agreement would require the city to provide flat fixed-rate contributions.

The new agreement will add about \$7.6 million in expenses to the city over the two-year period, which is roughly a 6.3 percent increase in total compensation. About \$2.7 million of that will come from the city's General Fund, with the rest drawing from various enterprise funds relating to utilities and public works.

The union reached an agreement after initially balking at the city's proposals to realign salaries and shift the medical formula. At a January meeting, the city declared an impasse in negotiations, prompting dozens of union workers to attend a council meeting and voice concerns about the proposed contract. Several utilities and public works employees argued that the city is no longer able to attract and retain workers because of insufficient pay.

Since then, the two sides held more meetings and negotiated a deal that was ratified by the workers, according to the union's announcement. The union described the deal in a statement as one that "provides workers with some relief after years of cuts." The SEIU was the first worker group to undergo benefit cuts in 2009, which included employee contributions for pensions and health care. Since then, the city has reached similar deals with other employee groups.

"The contract provides city workers with some immediate relief, but I doubt the wage requirements and cost-of-living adjustments will be enough to reverse Palo Alto's current staffing and retention crisis," Margaret Adkins, chair of SEIU, Local 521, said in a statement. "But, it is a step in the right direction."

According to the city, bringing employee salaries in line with the market median will cost the city roughly as much as providing the cost-of-living adjustments. The agreement also allows several positions to receive "additional adjustments to address unique recruitment and retention challenges," according to the city. The two sides have been negotiating since last fall.

"We are pleased that the SEIU membership has voted to accept this proposal, which offers a fair and balanced deal that seeks to ensure we can retain our excellent employees, where we are seeing heightened marketplace competition, especially in the utilities and enterprise sector, while also controlling health care costs in the future," City Manager James Keene said in a statement.

[http://www.mercurynews.com/news/ci\\_25286348](http://www.mercurynews.com/news/ci_25286348)

## **Palo Alto union members to get 4.5 percent raise under new agreement**

By Jason Green  
Palo Alto Daily News  
Mar. 5, 2014

After months of tense negotiations, Palo Alto and its largest employee union have forged a new labor agreement that provides pay raises and salary adjustments to hundreds of workers.

All 570 members of Service Employees International Local 521 would receive a 4.5 percent cost-of-living adjustment -- 2 percent would be retroactive to Dec. 1, 2013, and the remainder to Dec. 1, 2014.

In addition, the salaries of 315 workers in 89 job classifications identified as "under market" would be adjusted. Several positions would receive an additional adjustment to address recruitment and retention challenges.

The two-year agreement also changes the formula for employer-paid medical costs. The city would pay a flat fixed rate instead of covering 90 percent of a worker's premium cost.

The city council is scheduled to consider approval of the contract on March 17. The union has already ratified the agreement.

"We are pleased that the SEIU membership has voted to accept this proposal, which offers a fair and balanced deal that seeks to ensure we can retain our excellent employees, where we are seeing heightened marketplace competition, especially in the utilities and enterprise services sector, while also controlling health care costs in the future," City Manager James Keene said in a news release.

Margaret Adkins, SEIU Local 521 Palo Alto chapter chairwoman, said in a statement that the agreement was a "step in the right direction" but warned that it might not be enough to end an employee exodus.

"This contract provides city workers with some immediate relief, but I doubt the wage realignments and cost-of-living adjustments will be enough to reverse Palo Alto's current staffing and retention crisis," Adkins said.

Until recently, the city and union had been at odds over a contract to replace one that expired on Dec. 1, 2013. The city declared an impasse on Jan. 7 after the union presented its "last, best and final offer." The two sides, however, agreed to return to the bargaining table to hammer out an agreement.

The agreement is expected to cost the city an additional \$7.6 million when fully implemented.



# Busting the Achievement Gap

by Luisa Blue



Is there anyone among us who doesn't believe our children are our future, or that early childhood education is key to a person's future success in life?

Last week, I was invited to join the Gapbusters bus tour during its three-day, seven stop tour, from San Diego to Sacramento, to call on Gov. Brown to:

1. Commit to long-term investment in early learning and care programs by starting with the restoration of more than \$1 billion that was cut from the system since the economic recession
2. Prioritize the recruitment and retention of quality child care providers by signing the Quality Family Child Care Act (AB641) which will help improve training and oversight of the state's child care system.

If we don't start today, we won't be ready for tomorrow. Investing in early learning and care is—literally—investing in California's future.

“California is a national leader when it comes to bold initiatives that have a lasting, positive impacts on our state,” said Assemblyman Anthony Rendon, author of the Quality Family Child Care Act, AB 641. “But where we have failed to lead is on investment to early education and care despite it's crucial role in preparing our kids for school so that they are successful and prepared to go to college. Therefore, I urge Governor Brown to continue his legacy of a strong education system by ensuring that our kids are set-up for success in school by investing in early education.”

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*The author, Luisa Blue, left, with Assemblyman Anthony Rendon and other advocates  
Thank you, Assemblyman Rendon for joining us in San Jose.*

For photos and press releases related to the stops in San Jose and Bakersfield, I invite you to visit: [www.seiu521.org](http://www.seiu521.org) or [www.facebook.org/seiu521](http://www.facebook.org/seiu521).

Here is what child care provider Lorena Wright said at the Feb. 19 press conference in San Jose: “When children are brought into our day care, we know each of them has the potential to grow up and do great things, we see future graduates, future astronauts, chefs, scientists and novelists. It’s now time for California leaders to join us and also see our children’s potential and invest in that potential!”

Our Union, SEIU Local 521, represents 55,000 men and women who work in the public and private, non-profit sector. From Social Workers to Home Care workers, we are committed to putting our Community First through quality services that keep our communities strong. But we, as a state, are failing our children.

Let me share just a brief illustration of what we can do better. There are currently nearly 25,000 children – ages 0-13 – who are eligible for financial assistance for child care in Santa Clara county. These 25,000 kids are on a wait list.

For a child under three years old, the average wait list time in Santa Clara County is 1 to 1.5 years – even up to 2 years.

Working families need to know that their children are cared for when they go to work. A comprehensive early learning and care program is the best way to reduce missed shifts and sick days, and that’s good for both employers and working parents.

Right now, there is just one available licensed slot for every four children with working parents. Our children deserve better than this. Investment in early learning is simply the smart move for California.

The achievement gap impacts lifelong educational performance and is directly linked to poverty, inequality and crime. Early childhood learning and care can help close that gap and even prevent it from opening in the first place. In fact, quality early childhood education, especially for children from disadvantaged backgrounds, has been shown to:

- Increase high school graduation by 31 percent[1]
- Increase college attendance by more than 80 percent[2]
- Increase employment by 23 percent.[3]
- Reduce the prison population by 13,000 and save the state government \$1.1 billion every year.[4]

Today, children in California are condemned to the achievement gap and their bright futures dimmed based on the size of a parents' paycheck. The *Gapbusters* aim to change that.

Thank you to all our elected and community leaders, parents and children, who helped make the Gapbusters tour such a fun success!

[1] America's Promise Alliance: "Business Case for Early Childhood Investments," April 9, 2012. Report is a summary of research on early childhood education; specific research citations for each point available.

[2] Ibid.

[3] Ibid.

[4] "I'M THE GUY YOU PAY LATER: Sheriffs, Chiefs and Prosecutors Urge America to Cut Crime by Investing Now in High-Quality Early Education and Care", report by Fight Crime Invest in Kids California, 2013.

***Luisa Blue is the Chief Elected Officer of SEIU Local 521.***



## February 2014 Information Technology Report By: Don Brown, Information Technology Director

1. **IHSS Phone Banking campaign:** IT set up 30 phone banking stations using the computer internet and Unionware to make calls to our IHSS members. This included reconfiguring our network, data ports and software configuration of the laptops.
2. **PRI Circuit for San Carlos was ported over:** IT moved our telephone numbers for from one provider to another saving us money and gaining better quality of service. The circuit was successfully transferred
3. **File server Mercury failed :** Our File server Mercury crashed due to failed hardware equipment. IT was able to determine that the server would not boot up due to a hardware that controlled all of the hard drives in the server. IT was able to order the failed parts from New York, overnighted to us and the server was functioning by noon the next day.
4. **Communications equipment and software:** IT is working with our communications department to select the correct Macintosh products for our communication needs.
5. **Help Desk:** In the month of February the Information Technology Department successfully closed 395 Information Technology Trouble requests from all L521 staff.
6. **NAS server upgrades and maintenance:** IT upgraded the firmware on all of the satellite office NAS (Network Attached Storage devices) servers to insure stability and continual functionality.
7. **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 / network.
8. **Backups:** Monitored and configured all the servers' backups to be performed and monitored for disaster recovery on one central system.

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## **Admin / Building / Bylaws Report**

**By: Pam Rodgers, Admin Director**

**March 2014**

1. **CHUW Lease:** We are ending our lease with CHUW due to increased staffing in the Visalia office. We currently lease the space at \$ 250 per month. The lease with CHUW will end effective June 30, 2014.
2. **Mike Honda Lease:** We are increasing the lease for Mike Honda by \$ 250 per month to include the use of office supplies and kitchen sundries. This will take effect on April 1, 2014.
3. **Bylaws:** The next review of Bylaws will include chapters in Region 2 that has proxy language which are (Monterey Bay Air Pollution and City of Salinas). Additionally, we will be cleaning up the other chapters that are in compliance but still have inconsistencies such as Roberts Rules of Order or reflect AFL-CIO, etc.
  - a. The following bylaws will be reviewed and considered for the June Executive Board: Cupertino School District, City of Wasco and Monterey County Superior Court.
  - b. The following bylaws are tabled: Kern Courts – we do not have any date as to when the chapter will review the changes proposed by the bylaws committee. They are tabled pending review from the chapter.
4. **Admin Team:**
  - a. We completed the annual registry letters. These letters is a requirement for Local 521 to register as the union. In addition, any changes in staff letters are sent to those employers indicating the changes.
  - b. The monthly letters were sent to members and fee payers:
    - i. Notice to employees who are fee payers to become members: 575
    - ii. Notice to new employees who joined the union: 607
    - iii. No dues letter – this letter goes to members who are out on leave beyond 30 days and have gap in membership: 340
    - iv. Newly retired members welcoming to become retired members: 60
  - c. The admin team continues to audit the Local 521 website to delete any obsolete information and posted all new meetings for 2014. This is an ongoing monthly audit the team performs.
5. **SEJ Guidelines:** We will be continuing our work on the SEJ guidelines with the SEJ committee to review the recommendations for the April meeting. Our goal is to have established guidelines that will be reviewed and approved by the SEJ committee, Budget & Finance and Executive Board so that all caucuses are fully aware of the guidelines and procedures.
6. **Retiree Chapter:** The leadership body of the retiree chapter will be attending the Alliance for Retired Americans conference April 28 to May 1. Five members were approved by the leadership group to attend the conference.

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## Localwide Closed Settled-Resolved Other Status from 12-1-13 - 2-18-14

### Total 282 by Region

Region	Employer Name	Case Type	Status	Office	Count	Total by Region
Other	Child Care Providers United California	Unfair Labor Practice	Closed-Resolved	SJC	1	
Other	Local 521 Staff & Officers	Unfair Labor Practice	Closed Pending	SJC	1	
Other	Retired Members Chapter (521)	Member Contact	Closed-Resolved	SJC	1	3
Region 1	American Red Cross Blood Services Northern California Region	Arbitration	Closed Pending	SJC	6	
Region 1	Campbell Union High School District	Investigation	Closed-No Contact	SJC	3	
Region 1	Campbell Union High School District	Member Contact	Closed-Resolved	SJC	1	
Region 1	City of East Palo Alto	Member Contact	Closed-Resolved	SQL	16	
Region 1	City of Palo Alto	Arbitration In Process	Closed Pending	SQL	3	
Region 1	City of Palo Alto	Grievance	Closed Pending	SQL	3	
Region 1	City of Palo Alto	Member Contact	Closed-Denied	SQL	2	
Region 1	City of Palo Alto	Member Contact	Closed-No Contact	SQL	7	
Region 1	City of Palo Alto	Arbitration In Process	Closed-Settled	SQL	1	
Region 1	City of Palo Alto	Group Grievance	Closed-Settled	SQL	1	
Region 1	City of Palo Alto	Final Disciplinary Action	Closed-Settled	SQL	3	
Region 1	County - San Mateo	Grievance	Closed Pending	SQL	1	
Region 1	County - San Mateo	Member Contact	Closed-No Contact	SQL	1	
Region 1	County - San Mateo	Member Contact	Closed-Resolved	SQL	1	
Region 1	County - San Mateo	Recommended Disciplinary Action	Closed-Settled	SQL	2	
Region 1	County - Santa Clara	Grievance	Closed Pending	SJC	3	
Region 1	County - Santa Clara	Final Disciplinary Action	Closed Pending	SJC	3	
Region 1	County - Santa Clara	Probationary Release	Closed Pending	SJC	1	
Region 1	County - Santa Clara	Final Disciplinary Action	Closed-Denied	SJC	2	
Region 1	County - Santa Clara	Member Contact	Closed-Denied	SJC	1	
Region 1	County - Santa Clara	Probationary Release	Closed-Denied	SJC	2	
Region 1	County - Santa Clara	Final Disciplinary Action	Closed-Member Withdrew	SJC	1	
Region 1	County - Santa Clara	Member Contact	Closed-No Contact	SJC	1	
Region 1	County - Santa Clara	Final Disciplinary Action	Closed-No Contact	SJC	3	
Region 1	County - Santa Clara	Recommended Disciplinary Action	Closed-No Contact	SJC	1	
Region 1	County - Santa Clara	Grievance	Closed-No Contact	SJC	1	
Region 1	County - Santa Clara	Investigation	Closed-No Contact	SJC	1	
Region 1	County - Santa Clara	Probationary Release	Closed-No Contact	SJC	1	
Region 1	County - Santa Clara	Member Contact	Closed-Resolved	SJC	5	
Region 1	County - Santa Clara	Informal	Closed-Resolved	SJC	1	
Region 1	County - Santa Clara	Final Disciplinary Action	Closed-Settled	SJC	1	
Region 1	County - Santa Clara	Arbitration	Closed-Settled	SJC	1	
Region 1	County - Santa Clara	Grievance	Closed-Settled	SJC	1	
Region 1	County - Santa Clara	Recommended Disciplinary Action	Closed-Settled	SJC	1	
Region 1	Court - San Mateo County	Final Disciplinary Action	Closed Pending	SQL	1	
Region 1	Court - Santa Clara County	Final Disciplinary Action	Closed Pending	SJC	1	
Region 1	Court - Santa Clara County	Final Disciplinary Action	Closed-Denied	SJC	1	
Region 1	Court - Santa Clara County	Arbitration In Process	Closed-Denied	SJC	6	
Region 1	Gardner Family Care Corporation	Grievance	Closed-Denied	SJC	3	
Region 1	Gardner Family Care Corporation	Member Contact	Closed-No Contact	SJC	1	
Region 1	Gardner Family Care Corporation	Grievance	Closed-Settled	SJC	1	
Region 1	Humane Society of Silicon Valley	Final Disciplinary Action	Closed-No Contact	SJC	1	
Region 1	Law Foundation of Silicon Valley	Final Disciplinary Action	Closed-Denied	SJC	1	
Region 1	Momentum for Mental Health	Member Contact	Closed-Denied	SJC	2	
Region 1	Momentum for Mental Health	Probationary Release	Closed-Denied	SJC	1	
Region 1	Momentum for Mental Health	Member Contact	Closed-No Contact	SJC	1	

**Localwide Closed Settled-Resolved Other Status from 12-1-13 - 2-18-14**  
**Total 282 by Region**

Region	Employer Name	Case Type	Status	Office	Count	Total by Region
Region 1	Rebekah Children's Services	Member Contact	Closed-Resolved	SJC	1	
Region 1	Santa Clara COE	Final Disciplinary Action	Closed-Denied	SJC	1	
Region 1	Santa Clara COE	Arbitration In Process	Closed-Member Withdrew	SJC	1	
Region 1	Santa Clara COE	Unfair Labor Practice	Closed-Member Withdrew	SJC	1	
Region 1	Santa Clara COE	Member Contact	Closed-No Contact	SJC	1	
Region 1	Santa Clara COE	Member Contact	Closed-Resolved	SJC	1	
Region 1	Santa Clara COE	Member Contact	Closed-Settled	SJC	1	
Region 1	Santa Clara Valley Transportation Authority	Final Disciplinary Action	Closed-No Contact	SJC	1	
Region 1	Santa Clara Valley Transportation Authority	Final Disciplinary Action	Closed-Settled	SJC	1	111
Region 2	Chamberlain's Children Center	Member Contact	Closed-Resolved	SNS	1	
Region 2	City of Greenfield	Recommended Disciplinary Action	Closed-Resolved	SNS	1	
Region 2	City of Hollister	Recommended Disciplinary Action	Closed-Member Withdrew	SNS	1	
Region 2	City of Hollister	Member Contact	Closed-Resolved	SNS	1	
Region 2	City of King City	Grievance	Closed-Member Withdrew	SNS	1	
Region 2	City of Salinas	Member Contact	Closed-No Contact	SNS	2	
Region 2	City of Salinas	Grievance	Closed-Settled	SNS	12	
Region 2	City of Santa Cruz	Arbitration	Closed-Member Withdrew	SCR	3	
Region 2	City of Santa Cruz	Member Contact	Closed-Member Withdrew	SCR	1	
Region 2	City of Santa Cruz	Recommended Disciplinary Action	Closed-Member Withdrew	SCR	1	
Region 2	City of Santa Cruz	Needs to be reviewed	Closed-Resolved	SCR	2	
Region 2	City of Santa Cruz	Member Contact	Closed-Resolved	SCR	1	
Region 2	County - Monterey	Final Disciplinary Action	Closed-Denied	SNS	2	
Region 2	County - Monterey	Member Contact	Closed-Member Withdrew	SNS	1	
Region 2	County - Monterey	Member Contact	Closed-No Contact	SNS	1	
Region 2	County - Monterey	Final Disciplinary Action	Closed-No Contact	SNS	1	
Region 2	County - Monterey	Member Contact	Closed-Resolved	SNS	1	
Region 2	County - Monterey	Grievance	Closed-Resolved	SNS	1	
Region 2	County - Monterey	Group Grievance	Closed-Resolved	SNS	2	
Region 2	County - Monterey	Unfair Labor Practice	Closed-Resolved	SNS	1	
Region 2	County - Monterey	Recommended Disciplinary Action	Closed-Resolved	SNS	1	
Region 2	County - Monterey	Arbitration	Closed-Settled	SNS	1	
Region 2	County - Monterey	Grievance	Union Withdrew	SNS	10	
Region 2	County - San Benito	Member Contact	Closed-Member Withdrew	SNS	1	
Region 2	County - San Benito	Member Contact	Closed-Resolved	SNS	3	
Region 2	County - Santa Cruz	Member Contact	Closed-Denied	SCR	2	
Region 2	County - Santa Cruz	Civil Service Appeal/Personnel Board	Closed-Member Withdrew	SCR	1	
Region 2	County - Santa Cruz	Member Contact	Closed-Member Withdrew	SCR	2	
Region 2	County - Santa Cruz	Recommended Disciplinary Action	Closed-Member Withdrew	SCR	1	
Region 2	County - Santa Cruz	Recommended Disciplinary Action	Closed-No Contact	SCR	1	
Region 2	County - Santa Cruz	Final Disciplinary Action	Closed-No Contact	SCR	1	

**Localwide Closed Settled-Resolved Other Status from 12-1-13 - 2-18-14**  
**Total 282 by Region**

Region	Employer Name	Case Type	Status	Office	Count	Total by Region
Region 2	County - Santa Cruz	Member Contact	Closed-Resolved	SCR	1	
Region 2	County - Santa Cruz	Recommended Disciplinary Action	Closed-Resolved	SCR	1	
Region 2	County - Santa Cruz	Informal	Closed-Resolved	SCR	3	
Region 2	Court - Monterey County	Final Disciplinary Action	Closed-Settled	SNS	3	
Region 2	Court - Santa Cruz County	Member Contact	Closed-Resolved	SCR	3	
Region 2	Court - Santa Cruz County	Group Grievance	Closed-Settled	SCR	2	
Region 2	Court - Santa Cruz County	Unfair Labor Practice	Closed-Settled	SCR	1	
Region 2	Housing Authority of the County of Monterey	Needs to be reviewed	Closed-Resolved	SNS	1	
Region 2	Housing Authority of the County of Monterey	Grievance	Closed-Resolved	SNS	1	
Region 2	Monterey Bay Unified Air Pollution Control District	Member Contact	Closed-Resolved	SNS	3	
Region 2	MV Public Transportation	Final Disciplinary Action	Closed-Denied	SNS	1	
Region 2	San Lorenzo Valley Unified School District	Unfair Labor Practice	Closed-Denied	SCR	1	
Region 2	Santa Cruz Metro - SEA	Member Contact	Closed-Resolved	SCR	1	
Region 2	Temps City SC	Member Contact	Closed-Resolved	SCR	1	
Region 2	Temps County SC	Member Contact	Closed-Resolved	SCR	1	<b>85</b>
Region 3	County - Stanislaus	Member Contact	Closed-Member Withdrew	FAT	1	
Region 3	County - Tuolumne	Investigation	Closed-Resolved	FAT	1	
Region 3	Golden Valley Health Center	Member Contact	Closed-Resolved	FAT	1	
Region 3	Golden Valley Health Center	Investigation	Closed-Resolved	FAT	1	<b>4</b>
Region 4	Community Action Partnership of Madera	Grievance	Closed-Settled	FAT	2	
Region 4	County - Fresno	Unfair Labor Practice	Closed-Member Withdrew	FAT	1	
Region 4	County - Fresno	Investigation	Closed-No Contact	FAT	1	
Region 4	County - Fresno	Investigation	Closed-Resolved	FAT	17	
Region 4	County - Fresno	Final Disciplinary Action	Closed-Resolved	FAT	1	
Region 4	County - Fresno	Member Contact	Closed-Resolved	FAT	2	
Region 4	County - Fresno	Informal	Closed-Resolved	FAT	1	
Region 4	County - Fresno	Arbitration	Closed-Settled	FAT	1	
Region 4	County - Fresno	Member Contact	Closed-Settled	FAT	1	
Region 4	Dental Source	Grievance	Closed-Settled	FAT	1	
Region 4	First Student	Grievance	Closed-Member Withdrew	FAT	1	<b>29</b>
Region 5	Bear Valley Community Services District	Informal	Closed-Resolved	BFL	1	
Region 5	City of Arvin	Informal	Closed-Resolved	BFL	1	
Region 5	City of Bakersfield	Informal	Closed-Resolved	BFL	1	
Region 5	City of Hanford	Informal	Closed-Resolved	HAN	1	
Region 5	City of Taft	Member Contact	Closed-Resolved	BFL	1	
Region 5	Community Action Partnership of Kern	Informal	Closed-Member Withdrew	BFL	1	
Region 5	Community Action Partnership of Kern	Informal	Closed-Resolved	BFL	1	
Region 5	County - Kern	Grievance	Closed-Member Withdrew	BFL	1	
Region 5	County - Kern	Group Grievance	Closed-Member Withdrew	BFL	1	
Region 5	County - Kern	Informal	Closed-Member Withdrew	BFL	1	
Region 5	County - Kern	Final Disciplinary Action	Closed-Member Withdrew	BFL	5	

**Localwide Closed Settled-Resolved Other Status from 12-1-13 - 2-18-14**  
**Total 282 by Region**

Region	Employer Name	Case Type	Status	Office	Count	Total by Region
Region 5	County - Kern	Informal	Closed-No Contact	BFL	4	
Region 5	County - Kern	Group Grievance	Closed-Resolved	BFL	9	
Region 5	County - Kern	Grievance	Closed-Resolved	BFL	1	
Region 5	County - Kern	Member Contact	Closed-Resolved	BFL	2	
Region 5	County - Kern	Informal	Closed-Resolved	BFL	3	
Region 5	County - Kings	Investigation	Closed-Resolved	HAN	1	
Region 5	County - Tulare	Member Contact	Closed-Member Withdrew	VIS	1	
Region 5	County - Tulare	Investigation	Closed-Member Withdrew	VIS	1	
Region 5	County - Tulare	Investigation	Closed-Resolved	VIS	5	
Region 5	County - Tulare	Informal	Closed-Resolved	VIS	1	
Region 5	County - Tulare	Final Disciplinary Action	Closed-Settled	VIS	3	
Region 5	Court - Kern County	Informal	Closed-Member Withdrew	BFL	1	
Region 5	Court - Kern County	Grievance	Closed-Resolved	BFL	1	
Region 5	Court - Tulare County	Informal	Closed-Resolved	VIS	1	49
Region 6	IHSS Santa Clara	Member Contact	Closed-Resolved	SJC	1	1
					<b>Total</b>	<b>282</b>

## Localwide Cases Closed Settled with Monetary Awards 12-1-13 - 2-28-14

Region	Employer Name	Case Type	Status	Amount	Count	Total by Region
Region 1	County - Santa Clara	Final Disciplinary Action	Closed Pending	\$ 4,695.30	1	
Region 1	County - Santa Clara	Final Disciplinary Action	Closed-Settled	\$ 183.98	1	
Region 1	County - Santa Clara	Final Disciplinary Action	Closed-Settled	\$ 4,606.68	1	
Region 1	City of Palo Alto	Arbitration In Process	Closed-Settled	\$ 23,000.00	1	
Region 1	County - Santa Clara	Grievance	Closed-Settled	\$ 2,000.00	1	
Region 1	City of Palo Alto	Final Disciplinary Action	Closed-Settled	\$ 5,517.56	1	
Region 1	Gardner Family Care Corporation	Grievance	Closed-Settled	\$ 839.36	1	
Region 1	City of Palo Alto	Grievance	Closed-Settled	\$ 6,725.00	1	
Region 1	City of Palo Alto	Final Disciplinary Action	Closed-Settled	\$ 30,000.00		\$ 77,567.88
Region 2	City of Salinas	Grievance	Closed-Settled	\$ 87.50	1	
Region 2	County - Santa Cruz	Civil Service Appeal/Personnel B	Closed-Settled	\$ 468.80	1	
Region 2	Court - Monterey County	Final Disciplinary Action	Closed-Settled	\$ 180.22	1	\$ 736.52
Region 4	Dental Source	Grievance	Closed-Settled	\$ 1,500.00	1	\$ 1,500.00
			Confidential	\$ 15,000.00	1	\$ 15,000.00
			<b>Total</b>	<b>\$ 94,804.40</b>	12	<b>\$ 94,804.40</b>

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# Localwide Current Open-Open-Pending-Follow-up Referral Cases Report 3-20-14 TOTAL:658

Region	Employer Name	Status	Case Type	Stewards	Count	Count by Region
Other	Local 521 Staff & Officers	Follow-up	Member Contact		1	
Other	Local 521 Staff & Officers	Open	Unfair Labor Practice		1	
Other	Local 521 Staff & Officers	Open	Unfair Labor Practice		1	
Other	Local 521 Staff & Officers	Open	Unfair Labor Practice		1	
Other	Local 521 Staff & Officers	Open	Unfair Labor Practice		1	
Other	Local 521 Staff & Officers	Open	Unfair Labor Practice		1	
Other	Local 521 Staff & Officers	Referral	Member Contact		1	7
Region 1	Achievekids	Follow-up	Member Contact		4	
Region 1	Campbell Union High School District	Follow-up	Member Contact		1	
Region 1	Campbell Union High School District	Open	Grievance	Yes	1	
Region 1	City of East Palo Alto	Follow-up	Recommended Disciplinary Action		1	
Region 1	City of Menlo Park	Follow-up	Member Contact		1	
Region 1	City of Menlo Park	Follow-up	Recommended Disciplinary Action		1	
Region 1	City of Menlo Park	Follow-up	Member Contact	Yes	1	
Region 1	City of Menlo Park	Open	Grievance	Yes	1	
Region 1	City of Menlo Park	Open	Grievance	Yes	1	
Region 1	City of Mountain View	Follow-up	Investigation	Yes	1	
Region 1	City of Mountain View	Follow-up	Member Contact	Yes	1	
Region 1	City of Mountain View	Follow-up	Member Contact		1	
Region 1	City of Mountain View	Open	Group Grievance	yes	1	
Region 1	City of Mountain View	Open	Arbitration In Process	yes	1	
Region 1	City of Palo Alto	Follow-up	Member Contact	yes	1	
Region 1	City of Palo Alto	Follow-up	Member Contact	yes	1	
Region 1	City of Palo Alto	Follow-up	Investigation	Yes	1	
Region 1	City of Palo Alto	Follow-up	Member Contact		1	
Region 1	City of Palo Alto	Open	Final Disciplinary Action	yes	1	
Region 1	City of Palo Alto	Open	Group Grievance	yes	2	
Region 1	City of Palo Alto	Open	Arbitration	yes	1	
Region 1	City of Palo Alto	Open	Group Grievance	yes	1	
Region 1	City of Palo Alto	Open	Unfair Labor Practice		1	
Region 1	City of Palo Alto	Open	Grievance	yes	1	
Region 1	City of Palo Alto	Open	Final Disciplinary Action	yes	1	
Region 1	City of Palo Alto	Open	Final Disciplinary Action	yes	1	
Region 1	City of Palo Alto	Open	Final Disciplinary Action	yes	1	
Region 1	City of Palo Alto	Open	Final Disciplinary Action	yes	1	
Region 1	City of Palo Alto	Referral	Member Contact	yes	1	
Region 1	City of Redwood City	Follow-up	Investigation		1	
Region 1	City of San Mateo	Open	Group Grievance	yes	1	
Region 1	Community Solutions	Open	Grievance	yes	1	
Region 1	Community Solutions	Open	Final Disciplinary Action	yes	1	
Region 1	County - San Mateo	Follow-up	Member Contact		1	
Region 1	County - San Mateo	Follow-up	Member Contact	yes	1	
Region 1	County - San Mateo	Open	Arbitration In Process	yes	1	
Region 1	County - San Mateo	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Follow-up	Member Contact	yes	1	
Region 1	County - Santa Clara	Follow-up	Investigation	yes	1	
Region 1	County - Santa Clara	Follow-up	Member Contact	yes	1	
Region 1	County - Santa Clara	Follow-up	Investigation	yes	1	
Region 1	County - Santa Clara	Follow-up	Investigation	yes	1	
Region 1	County - Santa Clara	Follow-up	Investigation	yes	1	





# Localwide Current Open-Open-Pending-Follow-up Referral Cases Report 3-20-14 TOTAL:658

Region	Employer Name	Status	Case Type	Stewards	Count	Count by Region
Region 1	County - Santa Clara	Follow-up	Recommended Disciplinary Action		1	
Region 1	County - Santa Clara	Follow-up	Investigation	yes	1	
Region 1	County - Santa Clara	Follow-up	Member Contact	yes	1	
Region 1	County - Santa Clara	Follow-up	Investigation		1	
Region 1	County - Santa Clara	Follow-up	Recommended Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Follow-up	Investigation		1	
Region 1	County - Santa Clara	Follow-up	Investigation	yes	1	
Region 1	County - Santa Clara	Follow-up	Recommended Disciplinary Action		1	
Region 1	County - Santa Clara	Follow-up	Member Contact	yes	1	
Region 1	County - Santa Clara	Follow-up	Member Contact		1	
Region 1	County - Santa Clara	Follow-up	Recommended Disciplinary Action		1	
Region 1	County - Santa Clara	Follow-up	Member Contact		1	
Region 1	County - Santa Clara	Follow-up	Member Contact	yes	1	
Region 1	County - Santa Clara	Follow-up	Recommended Disciplinary Action		1	
Region 1	County - Santa Clara	Follow-up	Investigation	yes	1	
Region 1	County - Santa Clara	Follow-up	Investigation	yes	1	
Region 1	County - Santa Clara	Follow-up	Recommended Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Follow-up	Recommended Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Follow-up	Recommended Disciplinary Action		2	
Region 1	County - Santa Clara	Follow-up	Member Contact		1	
Region 1	County - Santa Clara	Follow-up	Member Contact		1	
Region 1	County - Santa Clara	Follow-up	Member Contact		1	
Region 1	County - Santa Clara	Follow-up	Member Contact		1	
Region 1	County - Santa Clara	Follow-up	Investigation	yes	1	
Region 1	County - Santa Clara	Follow-up	Investigation	yes	1	
Region 1	County - Santa Clara	Follow-up	Member Contact	yes	1	
Region 1	County - Santa Clara	Follow-up	Member Contact		1	
Region 1	County - Santa Clara	Follow-up	Member Contact		1	
Region 1	County - Santa Clara	Follow-up	Member Contact		1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	2	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Arbitration	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	

# Localwide Current Open-Open-Pending-Follow-up Referral Cases Report 3-20-14 TOTAL:658

Region	Employer Name	Status	Case Type	Stewards	Count	Count by Region
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Unfair Labor Practice		1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Probationary Release	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	2	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Probationary Release	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Probationary Release	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Arbitration In Process	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Unfair Labor Practice		1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	2	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	

# Localwide Current Open-Open-Pending-Follow-up Referral Cases Report 3-20-14 TOTAL:658

Region	Employer Name	Status	Case Type	Stewards	Count	Count by Region
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	2	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Unfair Labor Practice		1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	2	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Probationary Release	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Unfair Labor Practice		1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Probationary Release	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Investigation		1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Investigation		1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Recommended Disciplinary Action		1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Probationary Release	yes	1	
Region 1	County - Santa Clara	Open	Probationary Release	yes	1	
Region 1	County - Santa Clara	Open	Recommended Disciplinary Action		1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	

# Localwide Current Open-Open-Pending-Follow-up Referral Cases Report 3-20-14 TOTAL:658

Region	Employer Name	Status	Case Type	Stewards	Count	Count by Region
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Final Disciplinary Action	yes	1	
Region 1	County - Santa Clara	Open	Investigation		1	
Region 1	County - Santa Clara	Open	Probationary Release		1	
Region 1	County - Santa Clara	Open	Grievance	yes	1	
Region 1	County - Santa Clara	Open	Group Grievance	yes	1	
Region 1	County - Santa Clara	Referral	Member Contact	yes	1	
Region 1	County - Santa Clara	Referral	Member Contact	yes	1	
Region 1	County - Santa Clara	Referral	Member Contact		1	
Region 1	County - Santa Clara	Referral	Member Contact		1	
Region 1	County - Santa Clara	Referral	Member Contact	yes	1	
Region 1	County - Santa Clara	Referral	Member Contact	yes	1	
Region 1	County - Santa Clara	Referral	Member Contact	yes	1	
Region 1	Court - San Mateo County	Follow-up	Investigation		1	
Region 1	Court - San Mateo County	Follow-up	Recommended Disciplinary Action		1	
Region 1	Court - San Mateo County	Open	Grievance	yes	1	
Region 1	Court - San Mateo County	Open	Final Disciplinary Action	yes	1	
Region 1	Court - Santa Clara County	Follow-up	Investigation	yes	1	
Region 1	Court - Santa Clara County	Follow-up	Investigation		2	
Region 1	Court - Santa Clara County	Follow-up	Investigation	yes	1	
Region 1	Court - Santa Clara County	Follow-up	Member Contact	yes	1	
Region 1	Court - Santa Clara County	Follow-up	Recommended Disciplinary Action		1	
Region 1	Court - Santa Clara County	Follow-up	Member Contact		1	
Region 1	Court - Santa Clara County	Open	Unfair Labor Practice		1	
Region 1	Court - Santa Clara County	Open	Final Disciplinary Action	yes	1	
Region 1	Court - Santa Clara County	Open	Investigation		1	
Region 1	Court - Santa Clara County	Open	Arbitration In Process	yes	1	
Region 1	Court - Santa Clara County	Open	Arbitration In Process	yes	1	
Region 1	Court - Santa Clara County	Open	Grievance	yes	1	
Region 1	Court - Santa Clara County	Open	Final Disciplinary Action	yes	1	
Region 1	Court - Santa Clara County	Open	Arbitration In Process	yes	1	
Region 1	Court - Santa Clara County	Open	Grievance	yes	1	
Region 1	Court - Santa Clara County	Open	Grievance	yes	1	
Region 1	Court - Santa Clara County	Referral	Member Contact		1	
Region 1	Cupertino Union School District	Follow-up	Recommended Disciplinary Action	yes	1	
Region 1	Gardner Family Care Corporation	Follow-up	Member Contact	yes	1	
Region 1	Gardner Family Care Corporation	Open	Group Grievance	yes	1	
Region 1	Hope Services	Referral	Member Contact		1	
Region 1	Housing Authority of the County of Santa Clara	Open	Member Contact	yes	1	
Region 1	Housing Authority of the County of Santa Clara	Referral	Member Contact		1	
Region 1	Momentum for Mental Health	Follow-up	Member Contact	yes	1	
Region 1	Momentum for Mental Health	Follow-up	Member Contact	yes	1	
Region 1	Momentum for Mental Health	Follow-up	Member Contact	yes	1	

# Localwide Current Open-Open-Pending-Follow-up Referral Cases Report 3-20-14 TOTAL:658

Region	Employer Name	Status	Case Type	Stewards	Count	Count by Region
Region 1	Momentum for Mental Health	Open	Final Disciplinary Action	yes	1	
Region 1	Momentum for Mental Health	Open	Final Disciplinary Action	yes	1	
Region 1	Momentum for Mental Health	Referral	Member Contact	yes	1	
Region 1	Momentum for Mental Health	Referral	Member Contact	yes	1	
Region 1	Morgan Hill Unified School District	Follow-up	Recommended Disciplinary Action		1	
Region 1	Morgan Hill Unified School District	Follow-up	Member Contact		1	
Region 1	Morgan Hill Unified School District	Open	Unfair Labor Practice		1	
Region 1	Morgan Hill Unified School District	Open	Grievance		1	
Region 1	Peninsula Jewish Community Center	Open	Unfair Labor Practice	yes	1	
Region 1	Peninsula Jewish Community Center	Open	Final Disciplinary Action	yes	1	
Region 1	Rebekah Children's Services	Follow-up	Investigation	yes	1	
Region 1	San Andreas Regional Center	Open	Unfair Labor Practice		1	
Region 1	San Andreas Regional Center	Open	Arbitration In Process	yes	1	
Region 1	Santa Clara COE	Follow-up	Investigation	yes	1	
Region 1	Santa Clara COE	Follow-up	Recommended Disciplinary Action		1	
Region 1	Santa Clara COE	Follow-up	Member Contact	yes	1	
Region 1	Santa Clara COE	Follow-up	Recommended Disciplinary Action	yes	1	
Region 1	Santa Clara COE	Follow-up	Member Contact	yes	1	
Region 1	Santa Clara COE	Follow-up	Member Contact	yes	1	
Region 1	Santa Clara COE	Follow-up	Member Contact	yes	1	
Region 1	Santa Clara COE	Open	Probationary Release	yes	1	
Region 1	Santa Clara COE	Open	Grievance	yes	1	
Region 1	Santa Clara Valley Transportation Authority	Follow-up	Recommended Disciplinary Action		1	
Region 1	Santa Clara Valley Transportation Authority	Follow-up	Recommended Disciplinary Action		1	
Region 1	Santa Clara Valley Transportation Authority	Follow-up	Member Contact	yes	1	
Region 1	Santa Clara Valley Transportation Authority	Open	Arbitration In Process	yes	1	321
Region 2	Chamberlain's Children Center	Follow-up	Investigation	yes	1	
Region 2	Chamberlain's Children Center	Open	Unfair Labor Practice		1	
Region 2	City of King City	Open	Unfair Labor Practice	yes	1	
Region 2	City of Salinas	Open	Final Disciplinary Action	yes	1	
Region 2	City of Salinas	Referral	Informal		1	
Region 2	City of Santa Cruz	Follow-up	Member Contact	yes	1	
Region 2	City of Santa Cruz	Follow-up	Member Contact		1	
Region 2	City of Santa Cruz	Follow-up	Member Contact	yes	1	
Region 2	City of Santa Cruz	Open	Arbitration	yes	1	
Region 2	City of Santa Cruz	Open	Recommended Disciplinary Action	yes	1	

# Localwide Current Open-Open-Pending-Follow-up Referral Cases Report 3-20-14 TOTAL:658

Region	Employer Name	Status	Case Type	Stewards	Count	Count by Region
Region 2	City of Santa Cruz	Referral	Member Contact		1	
Region 2	City of Santa Cruz	Referral	Member Contact		1	
Region 2	City of Santa Cruz	Referral	Member Contact		1	
Region 2	City of Watsonville	Referral	Member Contact		1	
Region 2	County - Monterey	Follow-up	Member Contact	yes	1	
Region 2	County - Monterey	Follow-up	Member Contact	yes	1	
Region 2	County - Monterey	Follow-up	Member Contact	yes	1	
Region 2	County - Monterey	Follow-up	Member Contact	yes	1	
Region 2	County - Monterey	Follow-up	Member Contact		1	
Region 2	County - Monterey	Follow-up	Recommended Disciplinary Action	yes	1	
Region 2	County - Monterey	Follow-up	Recommended Disciplinary Action	yes	1	
Region 2	County - Monterey	Follow-up	Member Contact	yes	1	
Region 2	County - Monterey	Follow-up	Investigation		1	
Region 2	County - Monterey	Follow-up	Member Contact		1	
Region 2	County - Monterey	Follow-up	Member Contact		1	
Region 2	County - Monterey	Follow-up	Member Contact	yes	1	
Region 2	County - Monterey	Follow-up	Member Contact		1	
Region 2	County - Monterey	Follow-up	Member Contact	yes	1	
Region 2	County - Monterey	Follow-up	Investigation		1	
Region 2	County - Monterey	Follow-up	Investigation	yes	1	
Region 2	County - Monterey	Open	Arbitration		1	
Region 2	County - Monterey	Open	Group Grievance		1	
Region 2	County - Monterey	Open	Group Grievance	yes	1	
Region 2	County - Monterey	Open	Group Grievance	yes	1	
Region 2	County - Monterey	Open	Group Grievance	yes	1	
Region 2	County - Monterey	Open	Group Grievance	yes	1	
Region 2	County - Monterey	Open	Grievance	yes	1	
Region 2	County - Monterey	Open	Arbitration In Process		1	
Region 2	County - Monterey	Open	Arbitration	yes	1	
Region 2	County - Monterey	Open	Grievance		1	
Region 2	County - Monterey	Open	Arbitration	yes	1	
Region 2	County - Monterey	Open	Arbitration		1	
Region 2	County - Monterey	Open	Final Disciplinary Action		1	
Region 2	County - Monterey	Open	Arbitration In Process		1	
Region 2	County - Monterey	Open	Final Disciplinary Action		1	
Region 2	County - Monterey	Open	Investigation		1	
Region 2	County - Monterey	Open	Final Disciplinary Action	yes	1	
Region 2	County - Monterey	Open	Grievance		1	
Region 2	County - Monterey	Open	Final Disciplinary Action		1	
Region 2	County - Monterey	Open	Arbitration In Process	yes	1	
Region 2	County - Monterey	Open	Member Contact	yes	1	
Region 2	County - Monterey	Open	Final Disciplinary Action	yes	1	
Region 2	County - Monterey	Open	Group Grievance	yes	2	
Region 2	County - Monterey	Open	Recommended Disciplinary Action		3	
Region 2	County - Monterey	Open	Group Grievance	yes	1	
Region 2	County - Monterey	Open	Investigation	yes	1	
Region 2	County - Monterey	Open	Recommended Disciplinary Action		1	
Region 2	County - Monterey	Referral	Member Contact	yes	1	
Region 2	County - Monterey	Referral	Member Contact		1	
Region 2	County - Monterey	Referral	Member Contact	yes	1	

# Localwide Current Open-Open-Pending-Follow-up Referral Cases Report 3-20-14 TOTAL:658

Region	Employer Name	Status	Case Type	Stewards	Count	Count by Region
Region 2	County - Monterey	Referral	Meet & Confer		1	
Region 2	County - Monterey	Referral	Member Contact	yes	1	
Region 2	County - Monterey	Referral	Member Contact		1	
Region 2	County - Monterey	Referral	Member Contact		1	
Region 2	County - Monterey	Referral	Member Contact		1	
Region 2	County - Monterey	Referral	Member Contact		1	
Region 2	County - Monterey	Referral	Member Contact		1	
Region 2	County - Monterey	Referral	Member Contact		1	
Region 2	County - Monterey	Referral	Member Contact		1	
Region 2	County - Monterey	Referral	Member Contact		1	
Region 2	County - Monterey	Referral	Member Contact		2	
Region 2	County - Monterey	Referral	Member Contact	yes	1	
Region 2	County - Monterey	Referral	Member Contact	yes	1	
Region 2	County - Monterey	Referral	Member Contact	yes	1	
Region 2	County - Monterey	Referral	Member Contact		1	
Region 2	County - Monterey	Referral	Member Contact	yes	1	
Region 2	County - San Benito	Follow-up	Member Contact		1	
Region 2	County - San Benito	Follow-up	Recommended Disciplinary Action	yes	1	
Region 2	County - San Benito	Open	CA ST Personnel Board	yes	2	
Region 2	County - San Benito	Open	Unfair Labor Practice		1	
Region 2	County - San Benito	Open	Grievance	yes	1	
Region 2	County - Santa Cruz	Follow-up	Member Contact	yes	1	
Region 2	County - Santa Cruz	Follow-up	Member Contact	yes	1	
Region 2	County - Santa Cruz	Follow-up	Investigation		1	
Region 2	County - Santa Cruz	Follow-up	Recommended Disciplinary Action		1	
Region 2	County - Santa Cruz	Follow-up	Member Contact		1	
Region 2	County - Santa Cruz	Follow-up	Member Contact		1	
Region 2	County - Santa Cruz	Follow-up	Member Contact	yes	1	
Region 2	County - Santa Cruz	Follow-up	Recommended Disciplinary Action	yes	1	
Region 2	County - Santa Cruz	Follow-up	Member Contact	yes	1	
Region 2	County - Santa Cruz	Follow-up	Member Contact		2	
Region 2	County - Santa Cruz	Follow-up	Member Contact	yes	1	
Region 2	County - Santa Cruz	Follow-up	Member Contact	yes	1	
Region 2	County - Santa Cruz	Follow-up	Member Contact		1	
Region 2	County - Santa Cruz	Open	Arbitration In Process	yes	1	
Region 2	County - Santa Cruz	Referral	Meet & Confer		1	
Region 2	County - Santa Cruz	Referral	Member Contact		2	
Region 2	County - Santa Cruz	Referral	Member Contact		1	
Region 2	County - Santa Cruz	Referral	Member Contact	yes	1	
Region 2	County - Santa Cruz	Referral	Member Contact		1	
Region 2	County - Santa Cruz	Referral	Member Contact	yes	1	
Region 2	County - Santa Cruz	Referral	Member Contact		1	
Region 2	County - Santa Cruz	Referral	Member Contact		1	
Region 2	County - Santa Cruz	Referral	Member Contact		1	
Region 2	Court - Monterey County	Open	Final Disciplinary Action	yes	1	
Region 2	Court - Santa Cruz County	Follow-up	Member Contact	yes	1	
Region 2	Housing Authority of the County of Monterey	Follow-up	Member Contact	yes	1	
Region 2	Housing Authority of the County of Monterey	Follow-up	Member Contact	yes	1	

# Localwide Current Open-Open-Pending-Follow-up Referral Cases Report 3-20-14 TOTAL:658

Region	Employer Name	Status	Case Type	Stewards	Count	Count by Region
Region 2	Housing Authority of the County of Monterey	Follow-up	Member Contact		3	
Region 2	MAOF	Open	Grievance		1	
Region 2	MAOF	Open	Grievance		1	
Region 2	MAOF	Open	Unfair Labor Practice		1	
Region 2	MV Public Transportation	Follow-up	Member Contact		3	
Region 2	MV Public Transportation	Follow-up	Member Contact		4	
Region 2	MV Public Transportation	Follow-up	Member Contact		1	
Region 2	MV Public Transportation	Follow-up	Member Contact		2	
Region 2	MV Public Transportation	Open	Investigation		1	
Region 2	MV Public Transportation	Referral	Member Contact		1	
Region 2	Salud Para la Gente Inc	Referral	Member Contact		2	
Region 2	Santa Cruz Community Counseling Center	Referral	Member Contact	yes	1	
Region 2	Santa Cruz Community Counseling Center	Referral	Member Contact	yes	1	
Region 2	Santa Cruz Community Counseling Center	Referral	Member Contact		1	
Region 2	Santa Cruz Metro - SEA	Follow-up	Member Contact		1	
Region 2	Santa Cruz Metro - SEA	Open	Arbitration In Process	yes	1	
Region 2	Santa Cruz Metro - VMU	Follow-up	Member Contact	yes	1	
Region 2	Santa Cruz Metro - VMU	Open	Investigation	yes	1	
Region 2	Soquel Creek Water District	Referral	Needs to be reviewed		1	
Region 2	Soquel Creek Water District	Referral	Member Contact	yes	1	
Region 2	Soquel Creek Water District	Referral	Member Contact	yes	2	
Region 2	Temps City SC	Open-Pending	Unfair Labor Practice		1	147
Region 3	County - Mariposa	Open	Final Disciplinary Action		1	
Region 3	County - Mariposa	Open	Final Disciplinary Action		1	
Region 3	County - Stanislaus	Follow-up	Investigation		2	
Region 3	County - Stanislaus	Follow-up	Investigation		1	
Region 3	County - Stanislaus	Open	Arbitration		1	
Region 3	County - Stanislaus	Open	Grievance	yes	1	
Region 3	County - Stanislaus	Open	Grievance	yes	1	
Region 3	County - Stanislaus	Open	Final Disciplinary Action	yes	1	
Region 3	Golden Valley Health Center	Follow-up	Informal		1	
Region 3	Golden Valley Health Center	Open	Grievance	yes	1	
Region 3	Golden Valley Health Center	Open	Grievance	yes	1	
Region 3	Golden Valley Health Center	Open	Grievance	yes	1	
Region 3	Golden Valley Health Center	Open	Grievance	yes	1	
Region 3	Golden Valley Health Center	Open	Unfair Labor Practice		2	
Region 3	Golden Valley Health Center	Open	Grievance	yes	1	
Region 3	Golden Valley Health Center	Open	Grievance	yes	1	
Region 3	Golden Valley Health Center	Open	Grievance	yes	1	19
Region 4	Central California Legal Services	Open	Group Grievance	yes	1	
Region 4	County - Fresno	Follow-up	Investigation		1	
Region 4	County - Fresno	Follow-up	Investigation		1	



# Localwide Current Open-Open-Pending-Follow-up Referral Cases Report 3-20-14 TOTAL:658

Region	Employer Name	Status	Case Type	Stewards	Count	Count by Region
Region 4	County - Fresno	Follow-up	Investigation		1	
Region 4	County - Fresno	Follow-up	Member Contact		5	
Region 4	County - Fresno	Follow-up	Informal		1	
Region 4	County - Fresno	Follow-up	Investigation		1	
Region 4	County - Fresno	Follow-up	Investigation		2	
Region 4	County - Fresno	Follow-up	Investigation		1	
Region 4	County - Fresno	Follow-up	Member Contact		3	
Region 4	County - Fresno	Follow-up	Member Contact		2	
Region 4	County - Fresno	Follow-up	Investigation		1	
Region 4	County - Fresno	Open	Group Grievance	yes	1	
Region 4	County - Fresno	Open	Unfair Labor Practice		1	
Region 4	County - Fresno	Open	Group Grievance	yes	1	
Region 4	County - Fresno	Open	Group Grievance	yes	1	
Region 4	County - Fresno	Open	Group Grievance	yes	1	
Region 4	County - Fresno	Open	Group Grievance	yes	1	
Region 4	County - Fresno	Open	Unfair Labor Practice	yes	2	
Region 4	County - Fresno	Open	Arbitration		1	
Region 4	County - Fresno	Open	Arbitration		1	
Region 4	County - Fresno	Open	Arbitration		1	
Region 4	County - Fresno	Open	Group Grievance	yes	1	
Region 4	County - Fresno	Open	Arbitration		2	
Region 4	County - Fresno	Open	Grievance		2	
Region 4	County - Fresno	Open	Group Grievance	yes	1	
Region 4	County - Fresno	Open	Grievance	yes	1	
Region 4	County - Fresno	Open	Final Disciplinary Action	yes	1	
Region 4	County - Fresno	Open	Final Disciplinary Action	yes	1	
Region 4	County - Fresno	Open	Group Grievance	yes	2	
Region 4	County - Fresno	Open	Arbitration In Process		1	
Region 4	County - Fresno	Open	Grievance		1	
Region 4	County - Fresno	Open	Unfair Labor Practice		1	
Region 4	County - Fresno	Open	Group Grievance		1	
Region 4	County - Fresno	Open	Group Grievance	yes	1	
Region 4	County - Fresno	Open	Grievance	yes	1	
Region 4	County - Fresno	Open	Grievance	yes	1	
Region 4	County - Fresno	Open	Group Grievance	yes	1	
Region 4	County - Fresno	Open	Grievance	yes	1	
Region 4	County - Fresno	Open	Final Disciplinary Action	yes	1	
Region 4	County - Fresno	Open	Grievance	yes	1	
Region 4	County - Fresno	Open	Final Disciplinary Action	yes	1	
Region 4	County - Fresno	Open	Final Disciplinary Action	yes	1	
Region 4	County - Fresno	Open	Group Grievance	yes	1	
Region 4	County - Fresno	Open	Unfair Labor Practice		1	
Region 4	County - Fresno	Open	Unfair Labor Practice		1	
Region 4	County - Fresno	Open	Final Disciplinary Action	yes	1	
Region 4	County - Fresno	Open	Final Disciplinary Action	yes	1	
Region 4	County - Fresno	Open	Group Grievance	yes	1	
Region 4	County - Fresno	Open	Grievance	yes	1	
Region 4	County - Fresno	Open	Final Disciplinary Action	yes	1	
Region 4	County - Fresno	Open	Grievance	yes	1	
Region 4	County - Fresno	Open	Final Disciplinary Action	yes	1	
Region 4	County - Fresno	Referral	Investigation	yes	1	
Region 4	County - Madera COMPA	Open	Unfair Labor Practice		1	
Region 4	County - Madera COMPA	Open	Group Grievance	yes	1	

# Localwide Current Open-Open-Pending-Follow-up Referral Cases Report 3-20-14 TOTAL:658

Region	Employer Name	Status	Case Type	Stewards	Count	Count by Region
Region 4	County - Madera COMPA	Open	Final Disciplinary Action	yes	1	
Region 4	County - Madera COMPA	Open	Grievance	yes	1	
Region 4	County - Madera SEMC	Open	Group Grievance	yes	1	
Region 4	County - Madera SEMC	Open	Group Grievance	yes	1	
Region 4	Court - Fresno County	Open	Final Disciplinary Action	yes	1	
Region 4	Court - Fresno County	Open	Grievance	yes	1	
Region 4	Court - Fresno County	Open	Grievance	yes	1	
Region 4	First Student	Open	Grievance	yes	1	
Region 4	First Student	Open	Grievance	yes	1	
Region 4	First Student	Open	Grievance	yes	1	
Region 4	First Student	Open	Unfair Labor Practice		1	
Region 4	First Student	Open	Grievance	yes	1	
Region 4	Fresno Housing Authority	Follow-up	Investigation		1	
Region 4	Fresno Unified School District	Follow-up	Informal		5	
Region 4	Fresno Unified School District	Open	Group Grievance	yes	1	
Region 4	Fresno Unified School District	Open	Group Grievance	yes	1	
Region 4	Fresno Unified School District	Open	Grievance	yes	1	
Region 4	Fresno Unified School District	Open	Group Grievance	yes	1	90
Region 5	City of Bakersfield	Follow-up	Informal	yes	1	
Region 5	City of Bakersfield	Follow-up	Informal		1	
Region 5	City of Bakersfield	Open	Unfair Labor Practice	yes	1	
Region 5	City of Delano	Follow-up	Grievance		1	
Region 5	City of Delano	Open	Group Grievance	yes	1	
Region 5	City of Hanford	Follow-up	Informal		1	
Region 5	City of Tulare	Open	Unfair Labor Practice		1	
Region 5	City of Wasco	Follow-up	Member Contact		2	
Region 5	Community Action Partnership of Kern	Follow-up	Investigation		1	
Region 5	Community Action Partnership of Kern	Follow-up	Informal		1	
Region 5	Community Action Partnership of Kern	Open	Group Grievance		1	
Region 5	County - Kern	Follow-up	Member Contact		1	
Region 5	County - Kern	Follow-up	Informal		2	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Investigation		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Investigation		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal	yes	1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal		1	

# Localwide Current Open-Open-Pending-Follow-up Referral Cases Report 3-20-14 TOTAL:658

Region	Employer Name	Status	Case Type	Stewards	Count	Count by Region
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Follow-up	Informal		1	
Region 5	County - Kern	Open	Grievance		1	
Region 5	County - Kern	Open	Group Grievance		1	
Region 5	County - Kern	Open	Group Grievance	yes	2	
Region 5	County - Kern	Open	Grievance	yes	1	
Region 5	County - Kern	Open	Grievance		1	
Region 5	County - Kern	Open	Grievance		1	
Region 5	County - Kern	Open	Informal		1	
Region 5	County - Kern	Open	Unfair Labor Practice		1	
Region 5	County - Kern	Open	Unfair Labor Practice		1	
Region 5	County - Tulare	Follow-up	Investigation		1	
Region 5	County - Tulare	Follow-up	Investigation		1	
Region 5	County - Tulare	Follow-up	Investigation		1	
Region 5	County - Tulare	Follow-up	Investigation		1	
Region 5	County - Tulare	Follow-up	Member Contact		1	
Region 5	County - Tulare	Follow-up	Investigation		1	
Region 5	County - Tulare	Follow-up	Informal		1	
Region 5	County - Tulare	Follow-up	Investigation		1	
Region 5	County - Tulare	Follow-up	Informal		1	
Region 5	County - Tulare	Follow-up	Investigation		1	
Region 5	County - Tulare	Follow-up	Informal		1	
Region 5	County - Tulare	Follow-up	Informal		1	
Region 5	County - Tulare	Follow-up	Investigation		1	
Region 5	County - Tulare	Open	Unfair Labor Practice		1	
Region 5	County - Tulare	Open	Final Disciplinary Action		1	
Region 5	County - Tulare	Open	Unfair Labor Practice		1	
Region 5	County - Tulare	Open	Final Disciplinary Action		1	
Region 5	County - Tulare	Open	Group Grievance		1	
Region 5	Court - Tulare County	Follow-up	Investigation		1	
Region 5	Court - Tulare County	Open	Final Disciplinary Action		1	
Region 5	Court - Tulare County	Open	Arbitration		1	
Region 5	Kings Community Action Organization	Follow-up	Informal		1	
Region 5	Kings Community Action Organization	Follow-up	Informal		1	
Region 5	Kings Community Action Organization	Open	Grievance		1	
Region 5	Kings Community Action Organization	Open	Grievance		1	
Region 6	IHSS Santa Clara	Open	Member Contact		1	72
Region 6	Institute on Aging/Older Adults Care Management	Open	Final Disciplinary Action		1	
		Follow-up	Informal		1	2
				TOTAL:	658	658

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## UnionWare CED Administrative Audit List Report for Period January 1, 2014 through February 28, 2014

The following data is a reflection of:

- Incoming calls
- Outgoing calls
- Updating of member contact information
- Notes
- Tasking timelines
- Tasking case review & reminders
- Updating of tabs: progress, extra, awards, participants, etc.
- Attachment of documents to cases
- Tasking meetings/setting meetings
- Closing of tasks after case resolutions is reached

### **REGION 1**

Diego Valdez (CESA)	4786
Sandy Youngman (Secretary)	10432
Judy Heath (Secretary)	15097
Carmen Hernandez (Admin Director)	3196
	TOTAL: 33511

### **REGION 2**

Christopher Cox (CESA)	8883
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### **REGION 3 & 4**

Rachel Tudor (CESA)	7866
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### **REGION 5**

Vicki Avila (CESA/CES)	3340
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**SEIU Local 521  
PACE and PAC  
as of February 28, 2014**

Issues	
Bank Balance as of 1/31/14	\$ 31,856.55
<i>Outstanding Deposits: None</i>	-
<i>Outstanding Motions:</i>	
Membership at Kern Medical Center	10,000.00
Support Our Cupertino District Schools	5,000.00
<i>Available Funds - PACE</i>	452.06
<i>Available Funds - PAC</i>	16,404.49
	0.00

Candidates	
Bank Balance as of 1/31/14	\$ 72,307.61
<i>Outstanding Deposits: Jan, Feb</i>	16,901.20
<i>Outstanding Motions:</i>	
Kevin Mullin	1,500.00
Rich Gordon	2,000.00
Bob Wieckowski	1,500.00
Nora Campos	1,500.00
Paul Fong	2,000.00
Mark Stone	2,500.00
Luis Alejo	2,500.00
Rudy Salas	1,000.00
Jerry Hill	2,000.00
Jim Beall	2,500.00
Bill Monning	2,500.00
SBLC COPE Awards Dinner	2,000.00
<i>Available Funds - PACE</i>	1,940.86
<i>Available Funds - PAC</i>	54,613.95
<i>Available Funds - RETIREE</i>	9,154.00
	(0.00)

Independent Expenditures	
Bank Balance as of 1/31/14	\$ 129,794.72
<i>Outstanding Deposits: None</i>	-
<i>Outstanding Motions:</i>	
SBLC COPE Awards Dinner	3,000.00
<i>Available Funds - PACE</i>	5,175.00
<i>Available Funds - PAC</i>	121,619.72
	(0.00)

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## Pension Action Committee Report to SEIU 521 Executive Board- March 15, 2014

Here are some highlights of what is going on in the world of pensions and retirement security:

\* SEIU Public sector unions in California are going to put together two events to increase accountability between PERS (Public Employee Retirement System) and our members. The first is that at the State Council level we will be implementing a process to evaluate candidates for the PERS board that is comparable to the candidate review process we use for officials elected to Statewide office. The goal is to have that process in place by the end of April, so we can use it for PERS elections this year.

The second is that we are working on organizing a teletown hall forum with the two most recently elected PERS board members (Michael Bilbrey and J.J. Jelincic) to discuss policy questions.

\* The Secure Choice board, which has the responsibility of developing an implementation proposal for SB1234 will be holding a public hearing in Sacramento March 24 at 1 pm. We are hoping to send three members to speak before the board – one each from home care, child care, and public sector (preferably Santa Clara County) jurisdictions.

\* We are still pursuing getting PERS to set up a meeting with workers regarding changes in the Long Term Care (LTC) insurance program. Letters to 41,000 LTC policy holders are scheduled to be mailed in April 2014. These letters will be the next phase of a change in the program where people have to either pay a significant rate increase or switch to a less comprehensive set of long term care benefits.

\* Chuck Reed's ballot initiative attacking public sector pensions appears to be sinking for now. Most recently Reed and his supporters lost a lawsuit they filed against State Attorney General Kamala Harris. The court ruled that AG Harris's ballot description of the initiative was not biased or inaccurate. According to the San Jose Mercury News, "Reed's measure is now at a standstill — he has said it's unlikely to make the ballot this year and could be relaunched for the November 2016 election."

Minutes from the most recent Pension action committee are attached to this report. Our next meeting is Wednesday, April 2 at 6:00 pm. If you would like to be on our e-mail list and receive lots of updates on pension related matters, let me know.

Respectfully submitted,

Matt Nathanson  
Pension Action Committee Chair

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## **Pension Action Committee Meeting Minutes (Draft) - Tuesday, March 11th, 2014**

Tina Garnica, Karen Nakatani, Rachel Subega, Carmen Hernandez, Bob Sigala, Yolanda Moreno, Betty Chopoff, Laura Basua, Brain O'Neill, Karim Olaechea, Riko Mendez, Hoan Pham, Hannah Birnbaum, Sarah Zimmerman

**Retirement Security for All (SB 1234) - Background:** California passed 'Secured Choice (SB 1234) to create a pathway to address workers in the private sector who currently do not have any retirement plan. If the upcoming study/analysis meets requirements, this plan will cover almost all workers in private sector. The plan will be transportable when workers move from one job to the next. The plan will have an opt-out feature where workers will have to the option to not participate -- opt-in feature would cause many to not participate due to the hassle of signing up to participate. The new name for SB 1234 moving forward will be 'Secured Choice' 'Secured Choice' board currently meets once a month.

Timeline for Next Steps:

Committee will go out to bid for study/analysis in (1) program design and (2) legal analysis. Each area will have a subcommittee lead by labor-friendly board member. Bill Sokol (heading legal analysis subcommittee); Yvonne Walker (heading program design subcommittee)

- The two studies are estimated to be completed by Nov 2014
- Legislator will decide to be moved forward in Dec 2014
- Bill will be introduce in legislative session in Jan 2015
- If passed, will take effect sometime in 2016
- Estimated cost for the two study/analysis at approximately between \$1M to \$1.5M

Next 'Secured Choice' board meeting – Monday, March 24<sup>th</sup> @ 1pm in Sacramento (specific location TBD). Pension committee recommends Local 521 to identify one (1) home care worker, one (1) child care worker and one (1) public sector member (and staff) to testify at this March 24th meeting.

### **Highlights of the statewide RSA meeting:**

- Approximately 30 people attended across all locals in California
- Group developed calendar for the year
- Develop strategies on how to engage with people and how to change the narrative
- Focus in identifying existing materials and also developing new materials that will be effective
- Develop ways to hold region-wide meetings of members and with other unions and supportive organizations

### **3. Pension reform (AB340-PEPRA)**

**Chuck Reed and his initiative** - Background: Started raising money this year for initiative; got funding from Koch brother; initiative caused SEIU to get involved; worked with coalition on polling – even after Chuck Reed argument, polling show only 30% support of initiative -- polling helped us frame the right message to public and also deter any potential supporters and funders for the initiative; looks like we were able to fight off the initiative to be place on the Nov 2014 ballot, however we are starting to hear the push to place it on the 2016 election. Initiative currently doesn't attack retirees but could lead to future attacks on retiree pension if initiative is successful. Have to begin preparing now in preparation for future attacks on pension. Part of the overall campaign is to implement local wide COPE blitz to raise funding for the future attacks on pension.

#### 4) Infrastructure Investment

- Recruit individuals (possibly outside of the pension committee) to serve on a subcommittee focusing specifically on the infrastructure investment issue.
- Develop strategies to form better relationship with board members (i.e., attend board meetings)
- *(Passed out DRAFT of document from Dennak Murphy)* – document provides a set of principles to hold trustees accountable

#### 5) CalPERS local agency endorsement

**Updates in the endorsement for local agency seat/endorsement questions** – A draft endorsement process was distributed to committee members. It included:

Requirements of endorsement process (candidates must complete the following):

- Questionnaire
- Sign pledge
- Endorsement interview

The process will allow SEIU to identify candidates' stance on each platform. Process will also provide the candidate where SEIU stands on each platform. Process will remind candidates, when elected in office, who help to elect him/her and the platform they ran on.

The draft of the candidate endorsement process will be taken to the SEIU State Council for approval. The first test in applying this endorsement process will be for the CalPERS local agency seat (currently held by Priah Mather). We want to have the endorsement process completed by end of April 2014.

Discussion of questions for candidates *(Passed out draft on the endorsement questionnaire)*

Rephrase questionnaire to not allow candidates the respond with a 'Yes' or 'No' answer...or possibly follow up the 'Yes' or 'No' answer with a detailed answer providing supporting details.

The endorsement process should also include questions related to the following area. (Brian and Riko will come up with some questions on these matter): Local agencies, open door policy, PERS long term care

**-local wide pension survey / member input on the survey questions** - The survey will be sent to this committee electronically for input and feedback before sending it out to all of our members.

#### 6) Other Business/Announcements

**-Local funding contribution for work on retirement security statewide**

Motion: Committee recommends to use \$7,500 to cover one quarter of the year cost (from the Issues Account) to help fund State Retirement Security Project that will be staff by Sarah Zimmerman.

Motion - Tina Garnica / 2<sup>nd</sup> – Bob Sigala & Betty Chopoff) -- unanimously approved

7) **Next Meeting Date** - Wednesday, April 2<sup>nd</sup>, 6 pm

**SEIU LOCAL 521**  
**Social Economic & Justice Committee**  
**ACTIVITY REPORT**  
**January 2014 – March 2014**

**January 13, 2014** – Approved minutes for December 2013. Discussed Laptop request by SEJ Committee and Lavender Caucus, request was due to the inability to access the computers at the union office. Requested from the SEIU local 521 financial dept., a procedure guild and/or deadline date for end of the year submissions for payments.

**February 10, 2014** – Approved minutes for January 2014. FASTA President Sergio Garcia thanked SEJ for the donation to their glove drive. Discussed and reviewed the SEIU local 521 Anti Bullying Policy, new SEJ budget format, and SEJ guidelines.

**March 10, 2014** – Established the 2014 SEJ Summit Committee (i.e. Ellen R., Lorenzo L., Via C., Dolly C., Jennifer J., and Alysia B.). The SEJ Summit will be in Fresno this year on October 11, 2014. SEJ discussed the following items: establishing a benevolence coordinator in each caucus to send cards to members in need, Good Faith Accounting of incentive items, Good Faith Accounting of fundraiser funds, and being respectful of others by not having second helping and/or packing plates before all members have been served.

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**SEIU LOCAL 521**  
**AFRAM Central Valley (CV) Caucus**  
**ACTIVITY REPORT**  
**Jan 2014 – March 2014**

AFRAM Central Valley kept up meeting monthly meetings, SEJ meetings and Budget & Finance and Executive board meetings for Jan – March 2014

AFRAM Central Valley got their new banner after the original went missing and then when it was found, discovered that it had irreparable damage and would be replaced. Leaders and member voted in May 2013 to replace said banner and it will be hung in the Unity Hall in Fresno's Local 521 office with a sign out/in when taken from the Hall.

AFRAM members and leadership participated in the Martin Luther King Activities in Fresno, Ca Jan 17-20th: Garland Ceremony at Fresno County Court yard, MLK breakfast held at Clovis Veterans' Auditorium, Prayer Vigil at Fresno City College and MLK March from St John's Cathedral to Fresno Veterans' Auditorium and MLK program at Fresno Veteran's Auditorium.

AFRAM hosted their 1<sup>st</sup> Black History Celebration on Feb 22<sup>nd</sup> at the Unity Hall. Our Keynote Speaker was Rogenia Cox-Jackson. Our food was catered by Barney's Catering. Our entertainment was Tabia from San Jose, Ca. This event was with San Jose AFRAM. We had a low turnout due to not advertising earlier than the week of the event. We will have Tabia to perform for us next year's Black History Celebration on the last Saturday of February 2015. We gave purple SEIU items to Tabia: tote bags, pens, key chains, travel mugs, badge holders and penlight key chains. There were five members present. We gave Certificate of Appreciation to both the caterer and Tabia.

AFRAM Central Valley is working on building relationships with other California Caucuses and other AFRAMs to be developed in California so that we can support one another.

AFRAM Central Valley is working on doing road trips to further our awareness and sponsor a positive Community-oriented reputation and also to be a fundraiser to increase our opportunities to work our Community.

AFRAM Central Valley will be working on attending the Western AFRAM meetings with San Jose AFRAM so that we can continue on building a strong relationship among our brothers and sisters in the Western Region. To also develop our Leadership skills by working with our International/National AFRAM for membership, Immigration Reform and a fair budget with great health coverage.

AFRAM Central Valley will be purchasing SEIU materials to use in meetings and events as gifts from raffles.

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## Fresno Latino Caucus

This first quarter of 2014, the Latino caucus in Fresno had been busy participating in local events. In 1/14 we participated in MLK events in both Fresno & Clovis. We attended the community breakfast and marched in commemoration of MLK. We participated in the local Fresno comprehensive immigration reform coalition. In February we joined the league of Japanese American citizens in their day of remembrance. It was geared toward exposing the actions take by the US government both here and abroad in Latin America. In March we will be having our 6th annual Cesar Chavez event this year's theme "Service for Empowering Others". We will be focusing on voter registration, comprehensive immigration reform & political involvement.

## San Jose / San Mateo Caucus

We participated in a protest march in East Palo Alto against U.S. Immigration Policy to stop Deportation. There were around 400 activists participating in this action.

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# ASIAN PACIFIC AMERICAN LABOR ALLIANCE

## CAUCUS REPORT

March 2014

On February 15, 2014, new APALA Officers were nominated at their regular meeting at SEIU

Local 521 San Jose Office as follows;

<b>Chairwoman:</b>	Heidi Pham
<b>Co-Chairperson:</b>	
San Mateo County:	Dolly Clemente
Santa Clara County:	Helen Trinh
<b>Treasurer:</b>	Linh Nguyen
<b>Secretary:</b>	Khoa Ly
<b>Social Economic Coordinator:</b>	Myrna Bravo

Note: SEIU Bylaws for Unopposed Candidates:

If a nominee is unopposed after the local has provided reasonable opportunity for nominations, the local does not have to hold an election for that position.

On March 15, 2014, confirmation of newly elected/nominated officers.

Reported By:

Luis Aguilar

Outgoing Chairperson

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## SEIU Local 521 Executive Board Motion

\* **Motion Number: B**

Date: March 22, 2014

### **Motion Title: Political Consent Agenda - (pages 113-114)**

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

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

#### **Political Motions:**

- **B/1 – Contribution to Dave Cortese Campaign - (pages 115-116)**
- **B/2 – Confirmation of MBCLC Delegates - (pages 117-118)**
- **B/3 – Confirmation of San Mateo Labor Council Delegates - (pages 119-120)**
- **B/4 – MBCLC Annual Awards Dinner - \$1,000 - (pages 121-122)**
- **B/5 – Endorsement Monterey County District 2 Supervisor - (pages 123-124)**
- **B/6 – Independent Expenditure Monterey County District 2 Supervisor - (pages 125-126)**
- **B/7 – Candidate Contribution Monterey County District 3 Supervisor - (pages 127-128)**
- **B/8 – Polling for Monterey District 2 - (pages 129-130)**
- **B/9 – Endorsements for Fresno BOS - (pages 131-132)**
- **B/10 – Contributions to Fresno BOS Candidates - (pages 133-134)**
- **B/11 – Contribution to Esmeralda Soria Fresno City Council - (pages 135-136)**
- **B/12 – Contributions to State Constitutional Races - (pages 137-138)**
- **B/13 – Endorsement Katie Zolgin for Santa Clara County Superior Court - (pages 139-140)**

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

#### **Follow Up:**

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Moved by: \_\_\_\_\_ Second : \_\_\_\_\_

Pulled: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**

\_\_\_\_\_

## SEIU Local 521 Executive Board Motion

**Motion Number:** B/1

**Date:** March 22 & 23, 2014

**Motion Title:** Contributions to Dave Cortese, Candidate for Mayor of San Jose

**Recommended By:** Santa Clara and San Benito COPE Committee

**Background:** San Jose Mayor Chuck Reed is termed out. His terms have been a thorn in the side for the San Jose Unions (including police and fire), all public sector unions in California, and the County of Santa Clara. Mayor Reed was the elected officials who championed the false premise that, "the reason governments are in trouble was because of public pensions". Reed created an atmosphere in San Jose that moved into the Country of attaching public sector unions. Chuck Reed lost in court trying to change San Jose public sector pensions, but that has not stopped him. He is trying to get a State-wide initiative that would change vested rights for public sector pensions and change medical retirement.

There are six candidates for Mayor of San Jose. Five of them supported a City-wide initiative, Measure B, to change City of San Jose pensions for the future). Fortunately, this initiative has been thrown out by the Santa Clara Superior Court.

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

The San Jose Mayor's race is and will continue to receive National attention because of Chuck Reed's failure to work with unions in San Jose and because he imposed pension reform on the City of San Jose.

Dave has been endorsed by the South Bay Labor Council covering Santa Clara and San Benito Counties. Working families look towards Dave to restore the morale of the San Jose City employees.

**Motion:** To contribute up to \$1,100 from the Candidates Account and \$10,000 from the Independent Expenditure Account.

Check to Dave Cortese:

Cortese for Mayor 2014  
P.O. Box 51707  
San Jose, CA 95151

FPPC #1362187

Check to Independent Expenditure:

COPE South Bay Labor Council  
2102 Almaden Road Suite 114  
San Jose, CA 95125

FPPC # 7444711

**Follow Up:**

Moved by: \_\_\_\_\_ Second : \_\_\_\_\_

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**

\_\_\_\_\_



## SEIU Local 521 Executive Board Motion

**Motion Number:** B/2

**Date:** March 22 & 23, 2014

**Motion Title:** Confirmation of Monterey Bay Central Labor Delegate Seats

**Recommended By:** Matt Nathanson, Region 2 Vice President, and the Region 2 Executive Board Delegates and Trustees

**Background:** The President has been asked to update the list of delegates to the Monterey Bay Central Labor Council as follows:

Remove from CLC delegate list:  
Maria Castillo – Monterey County  
Ben Franklin – Monterey County  
Justin Light – Monterey County  
Diego Quevedo – Monterey County  
Linda Sakata – Monterey County

Continue on CLC Delegate List:  
Harry Clark – SLVUSD  
Ray Montemayor – Salinas City  
Robert Villegas – Salinas City  
Matt Nathanson – Santa Cruz County  
Veronica Rodriguez – Santa Cruz County  
Jeffrey Smedberg – Santa Cruz County  
Jay Donato – Staff  
Adam Urrutia – Staff

Add to CLC Delegate List:  
Debbie Narvaez – Staff

**Motion:** The Executive Board confirms the appointment, deletions, and continuations of delegates to the MBCLC as listed above. The Labor Council shall be notified of this decision.

**Follow Up:**

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Moved by: \_\_\_\_\_ Second : \_\_\_\_\_

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**

\_\_\_\_\_

## SEIU Local 521 Executive Board Motion

**Motion Number:** B/3

**Date:** March 22 & 23, 2014

**Motion Title:** Confirmation of San Mateo Delegate Seats at the San Mateo County Labor Council

**Recommended By:** San Mateo County Chapter Leadership

**Background:** The San Mateo County SEIU 521 Chapter Leadership voted and is recommending the following actions be taken in regards to the vacant and filled delegate positions on the San Mateo County Central Labor Council. Both Irma and Patty are being removed because of their withdrawal from leadership positions over 2 years ago. Brian and Miesha are being added because of their recent promotions into their respective positions.

**Additions**

Brian O'Neill (Political Coordinator)

Miesha Brown (Peninsula Lead Worksite Organizer)

**Removals**

Irma Compton

Patty Ryan

**Motion:** To confirm the appointment of Brian O'Neill and Miesha Brown as delegates to the San Mateo County Labor Council and the deletion of Irma Compton and Patty Ryan as CLC delegates. The Labor Council shall be notified of this decision.

**Follow Up:**

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Moved by: \_\_\_\_\_ Second : \_\_\_\_\_

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**

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# SEIU Local 521 Officers' Motion

Motion Number: B/4

Date: March 22 & 23, 2014

Motion Title: Monterey Bay Central Labor Council –Annual Awards Dinner – \$1,000 from the Candidates Account.

**Recommended By:** Santa Cruz County COPE Committee

**Background:** This year the Monterey Bay Central Labor Council will have its annual Awards Dinner at the Hyatt Regency Hotel & Spa in Monterey on April 25<sup>th</sup> 2014. It is an event that members from the Local have participated in each year. This year the Santa Cruz County COPE Committee voted to contribute \$1,000 for seats to the event.

**Motion:** To contribute \$1,000 to the MBCLC Annual Awards Dinner on April 25<sup>th</sup> at the Hyatt Regency Hotel & Spa in Monterey from the SEIU Local 521 Candidate PAC.

MBCLC COPE  
MBCLC Awards Dinner 2014  
931 E. Market St.  
Salinas, CA 93905

FPPC# 841975

**Follow Up:**

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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:** B/5

**Date:** March 22 & 23, 2014

**Motion Title:** Endorse Ed Mitchell for Monterey County District 2 Supervisor

**Recommended By:** Monterey County Candidate Endorsement Town Hall

**Background:** Long time County Supervisor, Lou Calcagno, is stepping down at the end of his term. 3 candidates are running to replace him. They are:

- 1) Ed Mitchell – A community activist and retired military engineer from Prunedale who garnered 45% of the vote when he ran against Calcagno 4 years ago
- 2) Maria Bonilla-Giuriato – A health care consultant for Clinica de Salud, former Schwarzenegger appointee, former Salinas City Councilwoman, unsuccessful mayor candidate, and former SEIU 817 member from Monterey County, and
- 3) John Phillips – A retired judge, director of Rancho Cielo, a jobs training program for at risk youth, and the hand-picked successor to Lou Calcagno by Calcagno and the leading anti-union construction magnate

The outcome of this race has the potential to greatly impact the next contract that our members bargain. The Monterey BOS has the reputation for being fairly labor friendly, but this friendliness hasn't applied in recent years when it comes to the biggest and most important contract that they actually vote on. Lou Calcagno was generally supportive of the Natividad Medical Center. Losing his support on the board on the hospital and replacing it with an untested vote could potentially impact the direction that hospital merger/affiliation talks go.

Of the 3 candidates running, Ed Mitchell and Maria Bonilla-Giuriato have responded to our questionnaire and signed our organizing pledge. Judge Phillips has taken a "no pledge" pledge.

The members at the town hall voted to endorse Ed Mitchell because of his positive attitude towards labor, his knowledge of county government, his willingness to challenge the county CAO and department heads on issues that are important to labor, his involvement in labor issues over the years, and because of the fact that his opponent, Maria Bonilla-Giuriato, worked for Arnold Schwarzenegger for five years and was the director of the Elect Meg Whitman campaign for the central portion of the state in 2010.

**Motion:** To endorse Ed Mitchell for Monterey County Supervisor District 2.

**Follow Up:**

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Moved by: \_\_\_\_\_ Second : \_\_\_\_\_

Amendment: \_\_\_\_\_

\_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**

\_\_\_\_\_



## SEIU Local 521 Executive Board Motion

**Motion Number:** B/6

**Date:** March 22 & 23, 2014

**Motion Title:** Independent Expenditure to elect Ed Mitchell up to \$25,000

**Recommended By:** Monterey County COPE Caucus

**Background:** On March 17<sup>th</sup>, the Monterey County membership voted to endorse Ed Mitchell for County Supervisor. The COPE Caucus convened via telephone on March 19<sup>th</sup> to consider motions to contribute money to his campaign and to conduct an independent expenditure to help elect him.

Ed Mitchell is the best-funded candidate in the race. He received 45% of the vote in this district 4 years ago against a long serving incumbent. He is well positioned to place in the top two vote getters and go on to a November runoff. He is not likely to win the race out right in June.

The prevailing wisdom is the Ed Mitchell and John Phillips will end up in the runoff. A first place finish for Mitchell could propel him to victory in the fall. A strong endorsement from SEIU could also help him win over the endorsement of the Democratic Party and other labor groups.

We will seek matching funds from SEIU-ULTCW.

**Motion:** To invest up to \$25,000 from the Independent Expenditure PAC to elect Ed Mitchell for Supervisor. *In the event that Monterey County allies are unable to generate 50% of the cost of funding the poll from the Monterey County District 2 polling measure, then it is requested that this amount be amended to allow the union to invest up to \$35,000.*

**Follow Up:**

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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: B/7**

**Date: March 22 & 23, 2014**

**Motion Title:** Candidate contribution to Ed Mitchell up to \$1,500

**Recommended By:** Monterey County COPE Caucus

**Background:** On March 17<sup>th</sup>, the Monterey County membership voted to endorse Ed Mitchell for County Supervisor. The COPE Caucus convened via telephone on March 19<sup>th</sup> to consider motions to contribute money to his campaign and to conduct an independent expenditure to help elect him.

Ed Mitchell is the best-funded candidate in the race. He received 45% of the vote in this district 4 years ago against a long serving incumbent. He is well positioned to place in the top two vote getters and go on to a November runoff. He is not likely to win the race out right in June.

The prevailing wisdom is the Ed Mitchell and John Phillips will end up in the runoff. A first place finish for Mitchell could propel him to victory in the fall. A strong endorsement from SEIU could also help him win over the endorsement of the Democratic Party and other labor groups.

**Motion:** To contribute \$1,500 from the Candidate PAC to Ed Mitchell for Monterey County Supervisor.

**Follow Up:**

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Moved by: \_\_\_\_\_ Second : \_\_\_\_\_

Amendment: \_\_\_\_\_

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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: B/8**

**Date: March 22 & 23, 2014**

**Motion Title:** Polling for Monterey County BOS District 2

**Recommended By:** Monterey County COPE Caucus

**Background:** On March 17<sup>th</sup>, the Monterey County membership voted to endorse Ed Mitchell for County Supervisor. The COPE Caucus convened via telephone on March 19<sup>th</sup> to consider motions to contribute money to the campaign and to conduct an independent expenditure to help elect the candidate.

Polling could benefit SEIU by helping us target our message to the right demographics and by helping us know how much of our financial resources will be required to boost the chances that our endorsed candidate will win. The district covers a large area with the county, where the voters likely care about different issues. 40% of the district is in urban Salinas and 60% is in a rural part of the county. Common sense says that voters in Salinas are going to care most about public safety and jobs and that voters in the rural areas are going to care about water and land use, but it is hard to know for sure without polling. Many issues are coming up in Monterey County, such as fracking, desalinization projects, and development of Ft. Ord and undeveloped agricultural land and nobody has an understanding of how the voters feel about these issues.

ULTCW, The Monterey Bay Central Labor Council, other unions, The North Salinas Valley Fund for Responsible Growth, and the Monterey County Democratic Central Committee are all potential groups with which we could jointly fund a poll to help us in electing Ed Mitchell to the Monterey County Board of Supervisors. SEIU Local 521 could volunteer to contribute up to 50% of the cost of the poll if the other entities combined could fund the other 50% of the cost of the poll. If the other entities could not come up with an equal share of the cost of the poll, then this money would not be spent.

**Motion:** To request up to \$10,000 from the Independent Expenditure account to go towards jointly funding a poll of likely 2<sup>nd</sup> district voters to better assist SEIU in targeting mail and other campaign resources. If Monterey County allies do not contribute 50% of the cost of the poll or more, then this money will *be added to the \$25,000 requested for Independent Expenditure making the total requested in the Independent Expenditure motion up to \$35,000.*

**Follow Up:**

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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: B/9

Date: March 22 & 23, 2014

Motion Title: Confirm Endorsements for Fresno Board of Supervisors

**Recommended By:** Fresno County COPE Committee Caucus

**Background:**

One of the Top Five Political priorities adopted by the Executive Board includes supporting and targeting the Fresno County Board of Supervisors campaigns. Fresno County had a "Speak with One Voice" Town Hall Meeting with our sister Unions, United Health Care West and SEIU 1000 recently. The meeting was widely attended, and 31 members from SEIU 521 attended from not only the County of Fresno, but others area Chapters such as FASTA.

**Motion:** To confirm the endorsement of Blong Xiong for Fresno County Board of Supervisors District 1, and to confirm the duel endorsement of Daniel Parra and Magdalena Gomez for Fresno County Board of Supervisors District 4.

**Follow Up:**

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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:** B/10

**Date:** March 22 & 23, 2014

**Motion Title:** Contributions to Fresno BOS Candidates from the Candidate PAC and the IE PAC

**Recommended By:** Fresno County COPE Committee Caucus

**Background:**

One of the Top Five Political priorities adopted by the Executive Board includes supporting and targeting the Fresno County Board of Supervisors campaign. In order to reach our priority of changing Fresno County Board of Supervisors direction, the Fresno COPE recommends the contributions listed below. All of the candidates below have signed our organizing pledge and have attended our "Speak with One Voice" Town Hall meeting.

**Motion:** To contribute:

\$15,000 from the SEIU 521 Candidate Account to the Blong Xiong for Fresno Supervisor Campaign, District 1.

\$1,000 from the SEIU 521 Candidate Account and \$850 from the PACE Candidates account for a total of \$1,850 to the Daniel Parra for Fresno Supervisor Campaign, District 4.

\$1,000 from the SEIU 521 Candidate Account and \$850 from the PACE candidates account for a total of \$1,850 to the Magdalena Gomez for Fresno Supervisor Campaign, District 4.

\$100,000 from the SEIU 521 Independent Expenditure Account to fund an IE Committee in support of Blong Xiong for Fresno Supervisor Campaign, District 4.

**Follow Up:**

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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:** B/11

**Date:** March 22 & 23, 2014

**Motion Title:** Contribution to Esmeralda Soria from the PACE Candidate PAC

**Recommended By:** Fresno County COPE Committee Caucus

**Background:**

Esmeralda Soria is a candidate for Fresno City Council District 1. She has been interviewed and endorsed by the Fresno County Labor Council. We see her as a candidate that represents our values and supports our causes. The funds will be used to do a mailer to help the candidate win in her district.

**Motion:** To contribute \$5,000 from the SEIU 521 PACE Independent Expenditure Account to the Esmeralda Soria Campaign.

**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:** B/12

**Date:** March 22 & 23, 2014

**Motion Title:** Contributions to SEIU endorsed California State Constitutional Office Candidates

**Recommended By:** Fresno County COPE Committee Caucus

**Background:**

On March 15, 2014, nearly 1,000 SEIU members across the State of California met to interview California State Constitutional Office candidates. SEIU 521 members were in two satellite locations, Oakland and Fresno. The contributions are for candidates that were endorsed by the State Council, where we have three votes.

**Motion:** To contribute \$1,000 from the SEIU 521 Candidate Account for a total of \$5,000 to the following Constitutional Office Candidates:

- Tom Torlakson Superintendent of Public Instruction (Incumbent)
- John Perez Candidate for Controller of California (Former Speaker of the Assembly)
- John Chang Candidate for Treasurer of California (Former Controller)
- Dave Jones California Insurance Commissioner (Incumbent)
- Kamela Harris California Attorney General (incumbent)

**Follow Up:**

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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:** B/13

**Date:** March 22 & 23, 2014

**Motion Title:** Confirm Endorsement for Katie Zolgin for a Possible Appointment by Governor Jerry Brown

**Recommended By:** Santa Clara and San Benito County COPE Committee

**Background:**

When a Superior Court Judge leaves in the middle of term, Governor Brown has the right to appoint. Katie Zolgin reached out to us and asked for our endorsement. The Santa Clara County COPE Committee set up a subcommittee to meet with her and asked questions. Katie did work, as a private attorney and fought the City of Stockton taking away medical retirement from existing retirees.

No contributions are necessary, but our Chief Elected Officer would sign a letter supporting Katie Zolgin's appointment and follow up with phone calls. We would also use our State Council lobbyist to do the same.

**Motion:** To confirm the endorsement of Katie Zolgin as a possible appointment to the Santa Clara County Superior Court

**Follow Up:**

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Moved by: \_\_\_\_\_ Second : \_\_\_\_\_

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**

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# COPE BLITZ REPORT

February 17 thru March 30

03/17/14

<b>Debbie Narvaez-Salinas</b>	<b>Blitz Total</b>	<b>COPE before Feb.17</b>	<b>Remaining to Goal</b>	<b>2014 Total</b>	<b># Conversations</b>
Debbie Narvaez	\$30.00	\$0.00	\$70.00	\$30.00	0
Henry Soria	\$0.00	\$0.00	\$100.00	\$0.00	0
Jay Donato	\$55.00	\$0.00	\$45.00	\$55.00	7
Miguel Saucedo	\$0.00	\$0.00	\$100.00	\$0.00	0
<b>Debbie Narvaez-Santa Cruz</b>	<b>Blitz Total</b>	<b>COPE before Feb.17</b>	<b>Remaining to Goal</b>	<b>2014 Total</b>	<b># Conversations</b>
Olivia Martinez (Lead)	\$31.00	\$0.00	\$69.00	\$31.00	0
Gary Klemz	\$189.00	\$0.00		\$189.00	38
Sonia Laracuenta	\$55.00	\$0.00	\$45.00	\$55.00	10
<b>Ernest Harris-Bakersfield</b>	<b>Blitz Total</b>	<b>COPE before Feb.17</b>	<b>Remaining to Goal</b>	<b>2014 Total</b>	<b># Conversations</b>
Ernest Harris	\$0.00	\$30.00	\$70.00	\$30.00	0
Delia Serrano (Lead)	\$10.00	\$0.00	\$90.00	\$10.00	13
Arthur Valdivia	\$100.00	\$0.00		\$100.00	22
Elizabeth Camarena	\$44.00	\$64.00		\$108.00	0
Marlene Valdez	\$31.00	\$0.00	\$69.00	\$31.00	42
Pete Rodriguez	\$84.00	\$10.00	\$6.00	\$94.00	92
Ramona Faucette	\$74.00	\$48.00		\$122.00	0
Robert Gibson	\$60.00	\$0.00	\$40.00	\$60.00	0
<b>Ernest Harris-Visalia</b>	<b>Blitz Total</b>	<b>COPE before Feb.17</b>	<b>Remaining to Goal</b>	<b>2014 Total</b>	<b># Conversations</b>
Courtney Hawkins	\$15.00	\$0.00	\$85.00	\$15.00	0
Mark Araiza	\$5.00	\$0.00	\$95.00	\$5.00	0
<b>Nick Raisch-San Carlos</b>	<b>Blitz Total</b>	<b>COPE before Feb.17</b>	<b>Remaining to Goal</b>	<b>2014 Total</b>	<b># Conversations</b>
Miesha Brown (Lead)	\$18.00	\$0.00	\$82.00	\$18.00	0
Aileen Rosado	\$24.00	\$0.00	\$76.00	\$24.00	0
Christopher Edwards	\$25.00	\$0.00	\$75.00	\$25.00	0
Daniel Becker	\$0.00	\$0.00	\$100.00	\$0.00	0
<b>Nick Raisch-Schools &amp; Spec. Dist.</b>	<b>Blitz Total</b>	<b>COPE before Feb.17</b>	<b>Remaining to Goal</b>	<b>2014 Total</b>	<b># Conversations</b>
Del Mallory	\$35.00	\$0.00	\$65.00	\$35.00	0
Josh Gengler	\$200.00	\$0.00		\$200.00	0
Lee Alvis	\$0.00	\$0.00	\$100.00	\$0.00	0
<b>Riko Mendez-Politics</b>	<b>Blitz Total</b>	<b>COPE before Feb.17</b>	<b>Remaining to Goal</b>	<b>2014 Total</b>	<b># Conversations</b>
Adam Urrutia	\$53.00	\$0.00	\$47.00	\$53.00	0
Ann Cervantes	\$0.00	\$20.00	\$80.00	\$20.00	11
Brian O'Neill	\$68.00	\$0.00	\$32.00	\$68.00	0
<b>Robert Li-Homecare</b>	<b>Blitz Total</b>	<b>COPE before Feb.17</b>	<b>Remaining to Goal</b>	<b>2014 Total</b>	<b># Conversations</b>
Mandy Lu	\$277.00	\$202.00		\$479.00	0
Merina Au Yeung	\$385.00	\$128.00		\$513.00	0
Rebeca Armendariz	\$0.00	\$31.00	N/A	\$31.00	0
Sylvia Sanchez	\$253.00	\$168.00		\$421.00	0
<b>Robert Li-Santa Clara County</b>	<b>Blitz Total</b>	<b>COPE before Feb.17</b>	<b>Remaining to Goal</b>	<b>2014 Total</b>	<b># Conversations</b>
Andrea Hightower (Lead)	\$30.00	\$0.00		\$30.00	0
Isabel Olazcoaga (Lead)	\$36.00	\$0.00		\$36.00	0
Darin Woodard	\$23.00	\$78.00		\$101.00	0
John Solis	\$163.80	\$221.00		\$384.80	104
Lili Marquez	\$66.80	\$34.00		\$100.80	0
Marline Pedregosa	\$55.00	\$50.00		\$105.00	0
<b>Tom Abshere-Fresno</b>	<b>Blitz Total</b>	<b>COPE before Feb.17</b>	<b>Remaining to Goal</b>	<b>2014 Total</b>	<b># Conversations</b>
Pat Riley (Lead)	\$80.00	\$0.00		\$80.00	0
Andy Christiansen	\$50.00	\$0.00	\$50.00	\$50.00	0
Brenda Smith	\$7.21	\$0.00	\$92.79	\$7.21	0
Diana Vasquez	\$95.00	\$0.00	\$5.00	\$95.00	0
Jason Thompson	\$23.00	\$0.00	\$77.00	\$23.00	0
Kevin Smith	\$66.00	\$0.00	\$34.00	\$66.00	0
LaTisha James	\$15.00	\$0.00	\$85.00	\$15.00	0
Mariam Alvarez	\$30.00	\$0.00	\$70.00	\$30.00	0
<b>SEIU 521 TOTAL</b>	<b>\$2,861.81</b>	<b>\$1,084.00</b>		<b>\$3,945.81</b>	

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# SEIU Local 521 Executive Board Motion

**Motion Number: C**

**Date: March 22, 2014**

**Motion Title:** Concurrence of the Election Committee Appointments and Timelines for the 2014 SEIU Local 521 Convention

**Recommended By:** Luisa Blue, Chief Elected Officer

**Background:** The next SEIU Local 521 Convention is just around the corner. It is scheduled to take place in San Jose - August 2014. There will be the required election process for Delegates to attend the Convention. The Local 521 Bylaws set out that process. It is time for the Election Committee for the election process to be appointed. In compliance with the Local Bylaws volunteers who will not seek Delegate status for the Convention are, herein, requested for appointment by the Local President or designee with concurrence by the Officers.

\*\*\* Recommended Timeline for the Election – Convention \*\*\* (addresses school 521 members' work schedules)

- |                              |  |
|------------------------------|--|
| 1. April 1 to April 30, 2014 | Notice of Election                         |
| 2. May 12 to June 13, 2014   | Voting Period                              |
| 3. July 1 to 31, 2014        | Seat delegates/Information to delegate     |
| 4. August 1 to 3             | Proposed date of Constitutional Convention |

Volunteers appointed to the Election Committee:

Crystal Bertheau, Margaret Morrison, and Martin Peaden all from the Santa Cruz County Elections Department

**Motion:** To concur with the following appointments by the Local President to the Election Committee and the Timelines for the 2014 Local 521 Convention.

Election Committee: Crystal Bertheau, Margaret Morrison, and Martin Peaden all from the Santa Cruz County Elections Department

**Follow Up:**

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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:** D

**Date:** March 22 & 23, 2014

**Motion Title:** Approve/Concur the Appointments of a "Trial Committee" to Hear Charges against a Santa Clara County Member.

**Recommended By:** Gwyn Harshaw, Local 521 President

**Background:** The Local Secretary has received and forwarded to the President duly filed charges against a Momentum Member.

According to the International Bylaws a hearing must be held and the entire Executive Board must approve a group of members to serve as the hearing officers in such cases.

President Harshaw would like to appoint \_\_\_\_\_,  
\_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_  
to hear charges filed against a Momentum Member.

**Motion:** To approve/concur the Presidential appointments of:

to hear charges against a Santa Clara County Member.

**Follow Up:**

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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:** E

**Date:** March 22 & 23, 2014

**Motion Title:** Fund the Secured Retirement Working Group

**Recommended By:** SEIU Local 521 Pension Committee

**Background:** One of the Top Five Proprieties adopted by the Executive Board includes providing a mechanism that will help all Californian's have a defined benefit plan for retirement. SB 1234 – Retirement Security for all (now known as Secured Choice), was voted by the State Legislature and signed by the Governor, with the help of SEIU 521.

Now that the Secured Choice is up and running, the SEIU State Council has set up a Committee of the '21's", SEIU California Locals, to deal directly with government pensions. This motion is to pay for the staff to hold bi-weekly meetings and work on providing talking points, member training and outreach to other community groups to support Secured Choice and public employee pensions.

**Motion:** To approve use of \$7,500 to fund the State Retirement Security Project that will be staffed by Sarah Zimmerman. This money will come from the SEIU Local 521 Issues Account.

**Follow Up:**

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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:** F

**Date:** March 22 & 23, 2014

**Motion Title:** Issue with Monterey County Contract Ratification Vote and its Election Committee

**Recommended By:** Matt Nathanson, Region 2 VP, Debbie Narvaez, Area Director  
Region 2

**Background:** Please see attached document.

**Motion:** To concur with the appointment of the President of a Committee to investigate and provide a recommendation/review and/or decision regarding the complaints received regarding the October 2013 Monterey County Contract ratification vote.

**Follow Up:**

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Moved by: \_\_\_\_\_ Second : \_\_\_\_\_

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**

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March 14, 2014

**TO:** SEIU 521 Executive Board

**FROM:** Region II Vice President Matt Nathanson  
and Regional Director Deborah Narvaez

**RE: Request for Investigation by independent panel appointed by the Executive Board**

In October 2013, Monterey County held ratification vote elections throughout various worksites in the County, in order to approve or reject a Tentative Agreement reached by bargaining team members.

During the week of October 21<sup>st</sup>, I, Deborah Narvaez, received some verbal complaints about harassment/intimidation allegations by bargaining team members towards voting members at the One Stop Career Center. On October 28, 2013, I requested to the main complainant, Terri Gallardo, Bargaining team member and One Stop employee, to submit all complaints in writing to me and/or the Monterey County Elections Committee, no later than October 28, 23.

The official complaints received were those of:

1. Terri Gallardo
2. Kathy Gonzales
3. Cynthia Sahagun

On November 5, 2013, the above referenced complainants were notified that the Elections committee would review their complaints. Internal Organizer Jay Donato was initially assigned to convene the Committee and begin the work and was later replaced by Miguel Saucedo to avoid any conflict of interest. That process began on December 2, 2013 when the committee reached out to the complainants via email to meet.

During the month of December 2013 a meeting was scheduled and subsequently cancelled at the request of the members who questioned the Elections Committee and the process itself. On December 12, 2013, I intervened based on email communications between the Committee and the complainants, since it appeared there was a meeting with members to be scheduled and it was to be open to all, rather than an investigatory meeting on an individual basis. Complainants were informed that I would speak with the Elections Committee to schedule one on one individual meetings.

Our Internal Organizer Miguel Saucedo attempted to meet with the Elections Committee in December on 2 occasions in which they failed to appear after confirming their attendance. I subsequently contacted them via email to schedule a conference call to deal with this matter and the Committee confirmed their participation on the call, in which once again they failed to participate on the call after confirming. It is apparent that the

Committee is no longer interested nor cares to resolve this Complaint process in a manner that complies with our SEIU 521 Bylaws and International Bylaws.

In order to ensure that our members complaints are reviewed in a fair process, I requested to our Regional Vice President Matt Nathanson and Trustee At Large Bill Ragland, to advise on how to proceed in this matter and complete an investigation which is long overdue for our members. Trustee Bill Ragland has deferred the matter to the Regional Vice President and after discussion with Matt; we are submitting this request to the Executive Board for a decisions.

At this time, Region II respectfully requests that the Executive Board appoint a panel of members to independently investigate this matter and provide a recommendations/review and/or decision on the complaints submitted, so that this matter can be addressed appropriately.

# **Officers' Installation Obligation**

"I, (name) \_\_\_\_\_, accept my responsibility as an elected officer of the Service Employees International Union, and I pledge that I will faithfully observe the Constitution and Bylaws of the Service Employees International Union.

"I pledge that I will provide ethical, responsible leadership, representing our members, and organizing new workers to build power to win for all.

"I pledge to make the growing gap between the rich and everyone else the problem of our time, to inspire and support workers everywhere who are ready to take collective action to lift wages and create family-sustaining jobs, to elect political leaders on the side of the 99% and to hold them accountable when they support politics that benefit the 1%.

"I agree to defend the principles of trade unionism.

"I will not knowingly wrong a member or see a member wronged if it is in my power to prevent it.

"I pledge to exercise leadership based on the SEIU standards of:

- Shared unity of purpose;
- Openness to questions and willingness to learn;
- Acting with the courage of our convictions;
- Working together with accountability; and
- Commitment to inclusion.

"I believe in and will fight for the SEIU vision of a just society where all workers are valued and people respected, where all families and communities thrive, and where we leave a better and more equal world for generations to come."

## SEIU Local 521 Executive Board Motion

\* Motion Number: A

Date: March 22 & 23, 2014

### Motion Title: Report Consent Agenda

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

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

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

1. **Approval of the Minutes for the Executive Board Meeting of December 7, 2013** - (pages 15-24)

2. **Budget & Finance Committee Report** – RoseAnn Dominguez, Local 521 Treasurer

**March 19, 2014 Meeting** – The Committee reviewed the January 2014 Financials - (25-42), no questions were asked. Some of the reports are in a new format that is by Region

- B&F Item 1 – Approved - the January 2014 Financials - (page 43-44)
- B&F Item 2 – Approved – to increase monthly Service Fee Rebate Set Aside from \$42,000 to \$60,000 retroactive to 1/1/14 - (page 45-46)
- Impact Harris vs Quinn Decision.
- Service Fee Rebate Report.
- Discussion – Service Fee Rebate Process.
- Report Update - Guidelines for SEJ Committee and Caucuses – will be discussed at next Budget & Finance Meeting.
- B&F Item 3 – Approved – Remodel of Bakersfield Downstairs - (page 47-50)
- Update – Lost Time checks – weekly reimbursements when completed requests are received.

3. **Good and Welfare Committee Report** – donations in February

- \$250 to Evelyn Ortega to help with expenses incurred because of her child's health condition.
- Please submit all Good & Welfare requests to both RoseAnn Dominguez and Karen Summers.

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

**Follow Up:**

Moved by: moord Second: seconded

Pulled: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**

Regina Kane

## SEIU Local 521 Executive Board Motion

Motion Number: C

Date: March 22, 2014

**Motion Title:** Concurrence of the Election Committee Appointments and Timelines for the 2014 SEIU Local 521 Convention

**Recommended By:** Luisa Blue, Chief Elected Officer

**Background:** The next SEIU Local 521 Convention is just around the corner. It is scheduled to take place in San Jose - August 2014. There will be the required election process for Delegates to attend the Convention. The Local 521 Bylaws set out that process. It is time for the Election Committee for the election process to be appointed. In compliance with the Local Bylaws volunteers who will not seek Delegate status for the Convention are, herein, requested for appointment by the Local President or designee with concurrence by the Officers.

\*\*\* Recommended Timeline for the Election – Convention \*\*\* (addresses school 521 members' work schedules)

- |                              |  |
|------------------------------|--|
| 1. April 1 to April 30, 2014 | Notice of Election                         |
| 2. May 12 to June 13, 2014   | Voting Period                              |
| 3. July 1 to 31, 2014        | Seat delegates/Information to delegate     |
| 4. August 1 to 3             | Proposed date of Constitutional Convention |

Volunteers appointed to the Election Committee:

Crystal Bertheau, Margaret Morrison, and Martin Peaden all from the Santa Cruz County Elections Department

**Motion:** To concur with the following appointments by the Local President to the Election Committee and the Timelines for the 2014 Local 521 Convention.

Election Committee: Crystal Bertheau, Margaret Morrison, and Martin Peaden all from the Santa Cruz County Elections Department

**Follow Up:**

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Moved by: Moved Second: Seconded

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_



Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

Signatures

Regina Kane

# SEIU Local 521 Executive Board Motion

Motion Number: D

Date: March 22 & 23, 2014

**Motion Title:** Approve/Concur the Appointments of a "Trial Committee" to Hear Charges against a Santa Clara County Member.

**Recommended By:** Gwyn Harshaw, Local 521 President

**Background:** The Local Secretary has received and forwarded to the President duly filed charges against a Momentum Member.

According to the International Bylaws a hearing must be held and the entire Executive Board must approve a group of members to serve as the hearing officers in such cases.

President Harshaw would like to appoint Adam Gintz,  
Luis Aguilar, Gary Linsner, and Linda Krolnik  
to hear charges filed against a Momentum Member.

**Motion:** To approve/concur the Presidential appointments of:  
Adam Gintz, Luis Aguilar, Gary Linsner, Linda Krolnik  
to hear charges against a Santa Clara County Member.

**Follow Up:**

Moved by: moved Second: seconded

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**

Razna Kaul

# SEIU Local 521 Executive Board Motion

Motion Number: E

Date: March 22 & 23, 2014

Motion Title: Fund the Secured Retirement Working Group

Recommended By: SEIU Local 521 Pension Committee

**Background:** One of the Top Five Proprieties adopted by the Executive Board includes providing a mechanism that will help all Californian's have a defined benefit plan for retirement. SB 1234 – Retirement Security for all (now known as Secured Choice), was voted by the State Legislature and signed by the Governor, with the help of SEIU 521.

Now that the Secured Choice is up and running, the SEIU State Council has set up a Committee of the '21's", SEIU California Locals, to deal directly with government pensions. This motion is to pay for the staff to hold bi-weekly meetings and work on providing talking points, member training and outreach to other community groups to support Secured Choice and public employee pensions.

**Motion:** To approve use of \$7,500 to fund the State Retirement Security Project that will be staffed by Sarah Zimmerman. This money will come from the SEIU Local 521 Issues Account.

Follow Up:

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Moved by: mouzd Second: seconded

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

Signatures

Regina Kalle

# SEIU Local 521 Executive Board Motion

Motion Number: F

Date: March 22 & 23, 2014

Motion Title: Issue with Monterey County Contract Ratification Vote and its Election Committee

**Recommended By:** Matt Nathanson, Region 2 VP, Debbie Narvaez, Area Director Region 2

**Background:** Please see attached document.

**Motion:** To concur with the appointment of the President of a Committee to investigate and provide a recommendation/review and/or decision regarding the complaints received regarding the October 2013 Monterey County Contract ratification vote. *Veronica Rodriguez as Chair, Victoria Rodriguez, Javier Sanchez*

**Follow Up:**

Moved by: Mourd Second: Seconded

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**

Rosina Kane

# SEIU Local 521 Executive Board Motion

Motion Number: G

Date: March 22 & 23, 2014

Motion Title: Building Peaceful Families; Golden Grandmother Recognition Luncheon May 16, 2014

Recommended By: Lydia Torres & Luisa Blue

**Background:**

Catholic Charities has been sponsoring lunch for grandmothers who are raising their grandchildren. The event is to recognize grandmothers in Santa Clara County who are building peaceful families and encouraging kids and their adult role models and by promoting involved, responsible and committed parenting. Catholic Charities is a long standing agency that works with community with Mental Health, Drug & Alcohol, immigrants, gangs and families. Goal is to help those in the community. This gives the Union an opportunity to work with agency and try to organize.

**Motion:** To approve \$500.00 to be able to provide 10 seats or one table for grandmothers being recognized who otherwise would not be able to come to event.

**Follow Up:**

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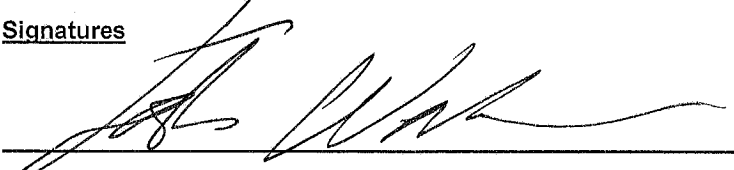
Moved by: Moved Second: Seconded

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: officers meeting

Signatures  


~ RSVP FORM ~

8th Annual

Golden Grandmothers Recognition Luncheon

To ensure preferred seating, please return your completed RSVP Form and payment no later than Friday, April 18, 2014. A limited number of seats will be available on the day of the event on a first-come, first-served basis.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Alternate Phone: \_\_\_\_\_

Email: \_\_\_\_\_

	<u>Cost</u>	<u>Qty</u>	<u>Total</u>
Individual Tickets	\$50	_____	\$ _____
Table for 10 People	\$500	_____	\$ _____
Total			\$ _____

To ensure excellent service, please print the names of the individuals that you are reserving tickets for and note any special needs below:

- 1. \_\_\_\_\_ 6. \_\_\_\_\_
- 2. \_\_\_\_\_ 7. \_\_\_\_\_
- 3. \_\_\_\_\_ 8. \_\_\_\_\_
- 4. \_\_\_\_\_ 9. \_\_\_\_\_
- 5. \_\_\_\_\_ 10. \_\_\_\_\_

Interpreter Needed:  Spanish  Vietnamese  Other (specify language: \_\_\_\_\_)

Other Special needs (please list): \_\_\_\_\_

I am unable to attend this event, but I would like to make a tax deductible donation to support Building Peaceful Families. Please accept my donation of \$ \_\_\_\_\_.

Please fax your completed RSVP Form to 815-846-2204 and send the form, along with your

c

# SEIU Local 521 Executive Board Motion

\* Motion Number: B

Date: March 22, 2014

## Motion Title: Political Consent Agenda - (pages 113-114)

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

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

### Political Motions:

- B/1 – Contribution to Dave Cortese Campaign - (pages 115-116)
- B/2 – Confirmation of MBCLC Delegates - (pages 117-118)
- B/3 – Confirmation of San Mateo Labor Council Delegates - (pages 119-120)
- B/4 – MBCLC Annual Awards Dinner - \$1,000 - (pages 121-122)
- B/5 – Endorsement Monterey County District 2 Supervisor - (pages 123-124)
- B/6 – Independent Expenditure Monterey County District 2 Supervisor - (pages 125-126)
- B/7 – Candidate Contribution Monterey County District 3 Supervisor - (pages 127-128)
- B/8 – Polling for Monterey District 2 - (pages 129-130)
- B/9 – Endorsements for Fresno BOS - (pages 131-132)
- B/10 – Contributions to Fresno BOS Candidates - (pages 133-134)
- B/11 – Contribution to Esmeralda Soria Fresno City Council - (pages 135-136)
- B/12 – Contributions to State Constitutional Races - (pages 137-138)
- B/13 – Endorsement Katie Zolgin for Santa Clara County Superior Court - (pages 139-140)

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

B/9, B/10, B/11, B/12 for clarification  
B/5, B/6, B/7, B/8 pulled

Follow Up:

Moved by: \_\_\_\_\_

Moved

Second: \_\_\_\_\_

Seconded

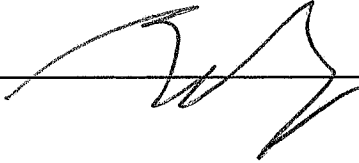
Pulled: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

Signatures

\_\_\_\_\_





## SEIU Local 521 Executive Board Motion

Motion Number: B/1

Date: March 22 & 23, 2014

Motion Title: Contributions to Dave Cortese, Candidate for Mayor of San Jose

**Recommended By:** Santa Clara and San Benito COPE Committee

**Background:** San Jose Mayor Chuck Reed is termed out. His terms have been a thorn in the side for the San Jose Unions (including police and fire), all public sector unions in California, and the County of Santa Clara. Mayor Reed was the elected officials who championed the false premise that, "the reason governments are in trouble was because of public pensions". Reed created an atmosphere in San Jose that moved into the Country of attaching public sector unions. Chuck Reed lost in court trying to change San Jose public sector pensions, but that has not stopped him. He is trying to get a State-wide initiative that would change vested rights for public sector pensions and change medical retirement.

There are six candidates for Mayor of San Jose. Five of them supported a City-wide initiative, Measure B, to change City of San Jose pensions for the future). Fortunately, this initiative has been thrown out by the Santa Clara Superior Court.

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

The San Jose Mayor's race is and will continue to receive National attention because of Chuck Reed's failure to work with unions in San Jose and because he imposed pension reform on the City of San Jose.

Dave has been endorsed by the South Bay Labor Council covering Santa Clara and San Benito Counties. Working families look towards Dave to restore the morale of the San Jose City employees.

**Motion:** To contribute up to \$1,100 from the Candidates Account and \$10,000 from the Independent Expenditure Account.

Check to Dave Cortese:

Cortese for Mayor 2014  
P.O. Box 51707  
San Jose, CA 95151

FPPC #1362187

Check to Independent Expenditure:

COPE South Bay Labor Council  
2102 Almaden Road Suite 114  
San Jose, CA 95125

FPPC # 7444711

**Follow Up:**

Moved by: Moord Second: Seconded

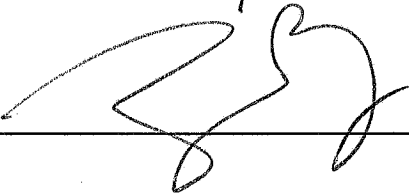
Amendment: \_\_\_\_\_

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: B/2

Date: March 22 & 23, 2014

**Motion Title: Confirmation of Monterey Bay Central Labor Delegate Seats**

**Recommended By:** Matt Nathanson, Region 2 Vice President, and the Region 2 Executive Board Delegates and Trustees

**Background:** The President has been asked to update the list of delegates to the Monterey Bay Central Labor Council as follows:

Remove from CLC delegate list:  
Maria Castillo – Monterey County  
Ben Franklin – Monterey County  
Justin Light – Monterey County  
Diego Quevedo – Monterey County  
Linda Sakata – Monterey County

Continue on CLC Delegate List:  
Harry Clark – SLVUSD  
Ray Montemayor – Salinas City  
Robert Villegas – Salinas City  
Matt Nathanson – Santa Cruz County  
Veronica Rodriguez – Santa Cruz County  
Jeffrey Smedberg – Santa Cruz County  
Jay Donato – Staff  
Adam Urrutia – Staff

Add to CLC Delegate List:  
Debbie Narvaez – Staff

**Motion:** The Executive Board confirms the appointment, deletions, and continuations of delegates to the MBCLC as listed above. The Labor Council shall be notified of this decision.

**Follow Up:**

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Moved by: Mouza Second: Seconded

Amendment: \_\_\_\_\_

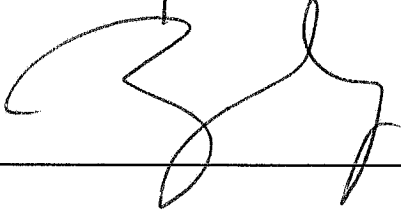
Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

Signatures

\_\_\_\_\_



# SEIU Local 521 Executive Board Motion

Motion Number: B/3

Date: March 22 & 23, 2014

**Motion Title:** Confirmation of San Mateo Delegate Seats at the San Mateo County Labor Council

**Recommended By:** San Mateo County Chapter Leadership

**Background:** The San Mateo County SEIU 521 Chapter Leadership voted and is recommending the following actions be taken in regards to the vacant and filled delegate positions on the San Mateo County Central Labor Council. Both Irma and Patty are being removed because of their withdrawal from leadership positions over 2 years ago. Brian and Miesha are being added because of their recent promotions into their respective positions.

**Additions**

Brian O'Neill (Political Coordinator)

Miesha Brown (Peninsula Lead Worksite Organizer)

**Removals**

Irma Compton

Patty Ryan

**Motion:** To confirm the appointment of Brian O'Neill and Miesha Brown as delegates to the San Mateo County Labor Council and the deletion of Irma Compton and Patty Ryan as CLC delegates. The Labor Council shall be notified of this decision.

**Follow Up:**

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Moved by: Mourd Second: Secoended

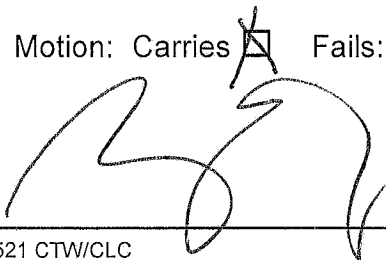
Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**



# SEIU Local 521 Officers' Motion

Motion Number: B/4

Date: March 22 & 23, 2014

Motion Title: Monterey Bay Central Labor Council –Annual Awards Dinner – \$1,000 from the Candidates Account.

**Recommended By:** Santa Cruz County COPE Committee

**Background:** This year the Monterey Bay Central Labor Council will have its annual Awards Dinner at the Hyatt Regency Hotel & Spa in Monterey on April 25<sup>th</sup> 2014. It is an event that members from the Local have participated in each year. This year the Santa Cruz County COPE Committee voted to contribute \$1,000 for seats to the event.

**Motion:** To contribute \$1,000 to the MBCLC Annual Awards Dinner on April 25<sup>th</sup> at the Hyatt Regency Hotel & Spa in Monterey from the SEIU Local 521 Candidate PAC.

MBCLC COPE  
MBCLC Awards Dinner 2014  
931 E. Market St.  
Salinas, CA 93905

FPPC# 841975

## Follow Up:

Moved by: Moose Second: Secord

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

## Signatures

\_\_\_\_\_

## SEIU Local 521 Executive Board Motion

**Motion Number:** B/5

**Date:** March 22 & 23, 2014

**Motion Title:** Endorse Ed Mitchell for Monterey County District 2 Supervisor

**Recommended By:** Monterey County Candidate Endorsement Town Hall

**Background:** Long time County Supervisor, Lou Calcagno, is stepping down at the end of his term. 3 candidates are running to replace him. They are:

- 1) Ed Mitchell – A community activist and retired military engineer from Prunedale who garnered 45% of the vote when he ran against Calcagno 4 years ago
- 2) Maria Bonilla-Giuriato – A health care consultant for Clinica de Salud, former Schwarzenegger appointee, former Salinas City Councilwoman, unsuccessful mayor candidate, and former SEIU 817 member from Monterey County, and
- 3) John Phillips – A retired judge, director of Rancho Cielo, a jobs training program for at risk youth, and the hand-picked successor to Lou Calcagno by Calcagno and the leading anti-union construction magnate

The outcome of this race has the potential to greatly impact the next contract that our members bargain. The Monterey BOS has the reputation for being fairly labor friendly, but this friendliness hasn't applied in recent years when it comes to the biggest and most important contract that they actually vote on. Lou Calcagno was generally supportive of the Natividad Medical Center. Losing his support on the board on the hospital and replacing it with an untested vote could potentially impact the direction that hospital merger/affiliation talks go.

Of the 3 candidates running, Ed Mitchell and Maria Bonilla-Giuriato have responded to our questionnaire and signed our organizing pledge. Judge Phillips has taken a "no pledge" pledge.

The members at the town hall voted to endorse Ed Mitchell because of his positive attitude towards labor, his knowledge of county government, his willingness to challenge the county CAO and department heads on issues that are important to labor, his involvement in labor issues over the years, and because of the fact that his opponent, Maria Bonilla-Giuriato, worked for Arnold Schwarzenegger for five years and was the director of the Elect Meg Whitman campaign for the central portion of the state in 2010.

**Motion:** To endorse Ed Mitchell for Monterey County Supervisor District 2. *will be confidential & provisional until April 3<sup>rd</sup>*

**Follow Up:**

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Moved by: Moved Second: Seconded

Amendment: as amended

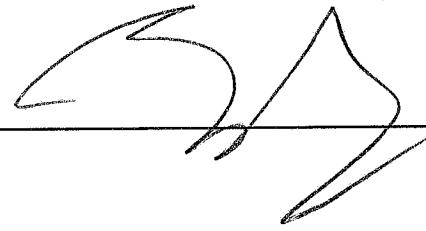
Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

Signatures

\_\_\_\_\_





## SEIU Local 521 Executive Board Motion

Motion Number: B/6

Date: March 22 & 23, 2014

**Motion Title:** Independent Expenditure to elect Ed Mitchell up to \$25,000

**Recommended By:** Monterey County COPE Caucus

**Background:** On March 17<sup>th</sup>, the Monterey County membership voted to endorse Ed Mitchell for County Supervisor. The COPE Caucus convened via telephone on March 19<sup>th</sup> to consider motions to contribute money to his campaign and to conduct an independent expenditure to help elect him.

Ed Mitchell is the best-funded candidate in the race. He received 45% of the vote in this district 4 years ago against a long serving incumbent. He is well positioned to place in the top two vote getters and go on to a November runoff. He is not likely to win the race out right in June.

The prevailing wisdom is the Ed Mitchell and John Phillips will end up in the runoff. A first place finish for Mitchell could propel him to victory in the fall. A strong endorsement from SEIU could also help him win over the endorsement of the Democratic Party and other labor groups.

We will seek matching funds from SEIU-ULTCW.

**Motion:** To invest up to \$25,000 from the Independent Expenditure PAC to elect Ed Mitchell for Supervisor. *In the event that Monterey County allies are unable to generate 50% of the cost of funding the poll from the Monterey County District 2 polling measure, then it is requested that this amount be amended to allow the union to invest up to \$35,000.* Will be confidential + provisional until April 3<sup>rd</sup>.

**Follow Up:**

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Moved by: Mourd Second: Secord

Amendment: as amended

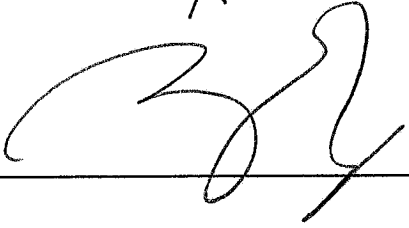
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Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

Signatures

  
\_\_\_\_\_

## SEIU Local 521 Executive Board Motion

Motion Number: B/7

Date: March 22 & 23, 2014

**Motion Title:** Candidate contribution to Ed Mitchell up to \$1,500

**Recommended By:** Monterey County COPE Caucus

**Background:** On March 17<sup>th</sup>, the Monterey County membership voted to endorse Ed Mitchell for County Supervisor. The COPE Caucus convened via telephone on March 19<sup>th</sup> to consider motions to contribute money to his campaign and to conduct an independent expenditure to help elect him.

Ed Mitchell is the best-funded candidate in the race. He received 45% of the vote in this district 4 years ago against a long serving incumbent. He is well positioned to place in the top two vote getters and go on to a November runoff. He is not likely to win the race out right in June.

The prevailing wisdom is the Ed Mitchell and John Phillips will end up in the runoff. A first place finish for Mitchell could propel him to victory in the fall. A strong endorsement from SEIU could also help him win over the endorsement of the Democratic Party and other labor groups.

**Motion:** To contribute \$1,500 from the Candidate PAC to Ed Mitchell for Monterey County Supervisor. *will be confidential & provisional until April 3<sup>rd</sup>*

**Follow Up:**

Moved by:         moued         Second:         Seconded        

Amendment:         as amended        

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

Signatures

## SEIU Local 521 Executive Board Motion

Motion Number: B/8

Date: March 22 & 23, 2014

Motion Title: Polling for Monterey County BOS District 2

Recommended By: Monterey County COPE Caucus

Background: On March 17<sup>th</sup>, the Monterey County membership voted to endorse Ed Mitchell for County Supervisor. The COPE Caucus convened via telephone on March 19<sup>th</sup> to consider motions to contribute money to the campaign and to conduct an independent expenditure to help elect the candidate.

Polling could benefit SEIU by helping us target our message to the right demographics and by helping us know how much of our financial resources will be required to boost the chances that our endorsed candidate will win. The district covers a large area with the county, where the voters likely care about different issues. 40% of the district is in urban Salinas and 60% is in a rural part of the county. Common sense says that voters in Salinas are going to care most about public safety and jobs and that voters in the rural areas are going to care about water and land use, but it is hard to know for sure without polling. Many issues are coming up in Monterey County, such as fracking, desalinization projects, and development of Ft. Ord and undeveloped agricultural land and nobody has an understanding of how the voters feel about these issues.

ULTCW, The Monterey Bay Central Labor Council, other unions, The North Salinas Valley Fund for Responsible Growth, and the Monterey County Democratic Central Committee are all potential groups with which we could jointly fund a poll to help us in electing Ed Mitchell to the Monterey County Board of Supervisors. SEIU Local 521 could volunteer to contribute up to 50% of the cost of the poll if the other entities combined could fund the other 50% of the cost of the poll. If the other entities could not come up with an equal share of the cost of the poll, then this money would not be spent.

Motion: To request up to \$10,000 from the Independent Expenditure account to go towards jointly funding a poll of likely 2<sup>nd</sup> district voters to better assist SEIU in targeting mail and other campaign resources. If Monterey County allies do not contribute 50% of the cost of the poll or more, then this money will be added to the \$25,000 requested for Independent Expenditure making the total requested in the Independent Expenditure motion up to \$35,000. *will be confidential + provisional until April 3<sup>rd</sup>*

Follow Up:

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Moved by: Mourd Second: Secounded

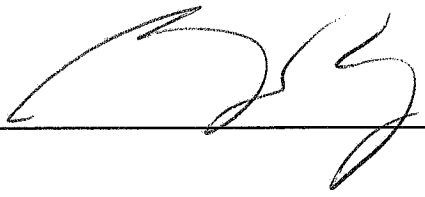
Amendment: as amended

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

Signatures

\_\_\_\_\_ 

# SEIU Local 521 Executive Board Motion

Motion Number: B/9

Date: March 22 & 23, 2014

Motion Title: Confirm Endorsements for Fresno Board of Supervisors

Recommended By: Fresno County COPE Committee Caucus

**Background:**

One of the Top Five Political priorities adopted by the Executive Board includes supporting and targeting the Fresno County Board of Supervisors campaigns. Fresno County had a "Speak with One Voice" Town Hall Meeting with our sister Unions, United Health Care West and SEIU 1000 recently. The meeting was widely attended, and 31 members from SEIU 521 attended from not only the County of Fresno, but others area Chapters such as FASTA.

**Motion:** To confirm the endorsement of Blong Xiong for Fresno County Board of Supervisors District 1, and to confirm the duel endorsement of Daniel Parra and Magdalena Gomez for Fresno County Board of Supervisors District 4.

**Follow Up:**

Moved by: Moussed Second: Secounded

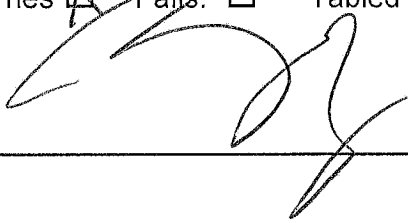
Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**

\_\_\_\_\_  


# SEIU Local 521 Executive Board Motion

Motion Number: B/10

Date: March 22 & 23, 2014

Motion Title: Contributions to Fresno BOS Candidates from the Candidate PAC and the IE PAC

Recommended By: Fresno County COPE Committee Caucus

**Background:**

One of the Top Five Political priorities adopted by the Executive Board includes supporting and targeting the Fresno County Board of Supervisors campaign. In order to reach our priority of changing Fresno County Board of Supervisors direction, the Fresno COPE recommends the contributions listed below. All of the candidates below have signed our organizing pledge and have attended our "Speak with One Voice" Town Hall meeting.

**Motion:** To contribute:

\$15,000 from the SEIU 521 Candidate Account to the Blong Xiong for Fresno Supervisor Campaign, District 1.

\$1,000 from the SEIU 521 Candidate Account and \$850 from the PACE Candidates account for a total of \$1,850 to the Daniel Parra for Fresno Supervisor Campaign, District 4.

\$1,000 from the SEIU 521 Candidate Account and \$850 from the PACE candidates account for a total of \$1,850 to the Magdalena Gomez for Fresno Supervisor Campaign, District 4.

\$100,000 from the SEIU 521 Independent Expenditure Account to fund an IE Committee in support of Blong Xiong for Fresno Supervisor Campaign, District 4.

**Follow Up:**

Moved by: Moved Second: Seconded

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

Signatures

# SEIU Local 521 Executive Board Motion

Motion Number: B/11

Date: March 22 & 23, 2014

Motion Title: Contribution to Esmeralda Soria from the PACE Candidate PAC

Recommended By: Fresno County COPE Committee Caucus

**Background:**

Esmeralda Soria is a candidate for Fresno City Council District 1. She has been interviewed and endorsed by the Fresno County Labor Council. We see her as a candidate that represents our values and supports our causes. The funds will be used to do a mailer to help the candidate win in her district.

**Motion:** To contribute \$5,000 from the SEIU 521 PACE Independent Expenditure Account to the Esmeralda Soria Campaign.

**Follow Up:**

Moved by: Moved Second: Seconded

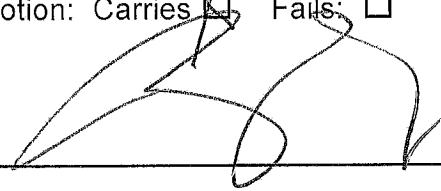
Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

Signatures





# SEIU Local 521 Executive Board Motion

Motion Number: B/12

Date: March 22 & 23, 2014

Motion Title: Contributions to SEIU endorsed California State Constitutional Office Candidates

**Recommended By:** Fresno County COPE Committee Caucus

**Background:**

On March 15, 2014, nearly 1,000 SEIU members across the State of California met to interview California State Constitutional Office candidates. SEIU 521 members were in two satellite locations, Oakland and Fresno. The contributions are for candidates that were endorsed by the State Council, where we have three votes.

**Motion:** To contribute \$1,000 from the SEIU 521 Candidate Account for a total of \$5,000 to the following Constitutional Office Candidates:

Tom Torlakson Superintendent of Public Instruction (Incumbent)  
John Perez Candidate for Controller of California (Former Speaker of the Assembly)  
John Chang Candidate for Treasurer of California (Former Controller)  
Dave Jones California Insurance Commissioner (Incumbent)  
Kamela Harris California Attorney General (incumbent)

**Follow Up:**

Moved by: Moved Second: Seconded

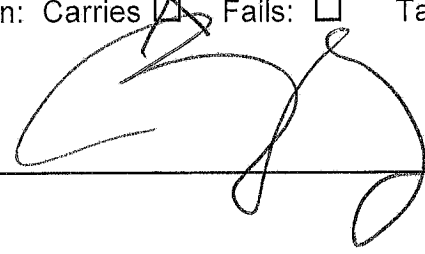
Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

**Signatures**

\_\_\_\_\_  


# SEIU Local 521 Executive Board Motion

Motion Number: B/13

Date: March 22 & 23, 2014

Motion Title: Confirm Endorsement for Katie <sup>Zolgin</sup>~~Zolgin~~ for a Possible Appointment by Governor Jerry Brown

Recommended By: Santa Clara and San Benito County COPE Committee

Background:

When a Superior Court Judge leaves in the middle of term, Governor Brown has the right to appoint. Katie Zolgin reached out to us and asked for our endorsement. The Santa Clara County COPE Committee set up a subcommittee to meet with her and asked questions. Katie did work, as a private attorney and fought the City of Stockton taking away medical retirement from existing retirees.

No contributions are necessary, but our Chief Elected Officer would sign a letter supporting Katie Zolgin's appointment and follow up with phone calls. We would also use our State Council lobbyist to do the same.

Motion: To confirm the endorsement of Katie Zolgin as a possible appointment to the Santa Clara County Superior Court

Follow Up:

Moved by: Moved Second: Seconded

Amendment: \_\_\_\_\_

Amended By: \_\_\_\_\_

Votes in Favor: \_\_\_\_\_ Votes Opposed: \_\_\_\_\_ Abstentions: \_\_\_\_\_

Motion: Carries  Fails:  Tabled Until:  Date: \_\_\_\_\_

Signatures

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