



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Form 990  Department of the Treasury Internal Revenue Service	Return of Organization Exempt From Income Tax Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)	OMB No 1545-0047 <div> <div>2009</div> <div>Open to Public Inspection</div> </div>
	The organization may have to use a copy of this return to satisfy state reporting requirements	

A For the 2009 calendar year, or tax year beginning 10-01-2009 and ending 09-30-2010		B Check if applicable <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending		C Name of organization SEIU Local 503 Oregon Public Employees Union Doing Business As Number and street (or P O box if mail is not delivered to street address) Room/suite P O BOX 12159 City or town, state or country, and ZIP + 4 SALEM, OR 97309		D Employer identification number 93-0323147 E Telephone number (503) 581-1505 G Gross receipts \$ 27,154,066	
		F Name and address of principal officer Heather Conroy P O BOX 12159 SALEM, OR 97309		H(a) Is this a group return for affiliates? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No H(b) Are all affiliates included? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list (see instructions) H(c) Group exemption number 0932			
I Tax-exempt status <input checked="" type="checkbox"/> 501(c) (5) (insert no) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527							
J Website: www.seiu503.org							
K Form of organization <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other		L Year of formation 1943		M State of legal domicile OR			

Part I		Summary		
Activities & Governance	1	Briefly describe the organization's mission or most significant activities TO IMPROVE THE QUALITY OF LIFE THROUGH WORKER EMPOWERMENT AND A PROGRESSIVE LABOR MOVEMENT		
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets		
	3	Number of voting members of the governing body (Part VI, line 1a)	3 2	
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4 2	
	5	Total number of employees (Part V, line 2a)	5 16	
	6	Total number of volunteers (estimate if necessary)	6	
	7a	Total gross unrelated business revenue from Part VIII, column (C), line 12	7a 110,06	
	7b	Net unrelated business taxable income from Form 990-T, line 34	7b	
Revenue	8	Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9	Program service revenue (Part VIII, line 2g)	22,240,331	22,247,620
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	727,569	768,915
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	295,568	9,269
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	492,713	431,002
	12		23,756,181	23,456,806
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	56,052	67,521
	14	Benefits paid to or for members (Part IX, column (A), line 4)	101,978	104,160
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	10,662,906	11,040,294
	16a	Professional fundraising fees (Part IX, column (A), line 11e)		0
	b	Total fundraising expenses (Part IX, column (D), line 25) ⁰		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24f)	11,946,271	12,492,365
	18	Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	22,767,207	23,704,340
	19	Revenue less expenses Subtract line 18 from line 12	988,974	-247,534
Net Assets or Fund Balances		Beginning of Current Year	End of Year	
	20	Total assets (Part X, line 16)	16,449,603	17,541,657
	21	Total liabilities (Part X, line 26)	2,357,151	3,068,266
	22	Net assets or fund balances Subtract line 21 from line 20	14,092,452	14,473,391

Part II Signature Block	
Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge
	<div> <div>*****</div> <div>Signature of officer</div> </div> <div> <div>2011-08-03</div> <div>Date</div> </div>
	<div> <div>Heather Conroy executive director</div> <div>Type or print name and title</div> </div>
Paid Preparer's Use Only	<div> <div>Preparer's signature</div> <div>Donald King CPA</div> </div> <div>Date</div> <div> <div>Check if self-employed</div> <div><input checked="" type="checkbox"/></div> </div> <div>Preparer's identifying number (see instructions)</div>
	<div> <div>Firm's name (or yours if self-employed), address, and ZIP + 4</div> <div>AKT LLP</div> <div>680 Hawthorne Ave SE 140</div> <div>Salem, OR 97301</div> </div> <div>EIN</div>
	<div>Phone no (503) 585-7774</div>

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No

1 Briefly describe the organization's mission

TO IMPROVE THE QUALITY OF LIFE THROUGH WORKER EMPOWERMENT AND A PROGRESSIVE LABOR MOVEMENT

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code) (Expenses \$ including grants of \$) (Revenue \$)

THE ORGANIZATION IS A LABOR UNION, REPRESENTING THE INTERESTS OF 45,179 SERVICE EMPLOYEES IN THE STATE OF OREGON

4b (Code) (Expenses \$ including grants of \$) (Revenue \$)

4c (Code) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe in Schedule O)
(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses \$

Part IV

Checklist of Required Schedules

		Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A	1	No
2	Is the organization required to complete Schedule B, Schedule of Contributors?	2	No
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	3	Yes
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II	4	
5	Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If "Yes," complete Schedule C, Part III	5	No
6	Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I	6	No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If "Yes," complete Schedule D, Part II	7	No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III	8	No
9	Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV	9	No
10	Did the organization, directly or through a related organization, hold assets in term, permanent,or quasi-endowments? If "Yes," complete Schedule D, Part V	10	No
11	Is the organization's answer to any of the following questions "Yes"? If so,complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.	11	Yes
	Did the organization report an amount for land, buildings, and equipment in Part X, line10? If "Yes," complete Schedule D, Part VI.		
	Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII.		
	Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII.		
	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX.		
	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X.		
	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48? If "Yes," complete Schedule D, Part X.		
12	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI, XII, and XIII	12	Yes
12A	Was the organization included in consolidated, independent audited financial statements for the tax year?	Yes	No
	If "Yes," completing Schedule D, Parts XI, XII, and XIII is optional	12A	No
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13	No
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a	No
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? If "Yes," complete Schedule F, Part I	14b	No
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the U S ? If "Yes," complete Schedule F, Part II	15	No
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the U S ? If "Yes," complete Schedule F, Part III	16	No
17	Did the organization report a total of more than \$15,000, of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I	17	No
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	18	No
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III	19	No
20	Did the organization operate one or more hospitals? If "Yes," complete Schedule H	20	No

Part IV

Checklist of Required Schedules (continued)

21	Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	21	Yes	
22	Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>	22		No
23	Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>	23	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer questions 24b-24d and complete Schedule K. If "No," go to line 25</i>	24a		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>	25a		
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>	25b		
26	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i>	26		No
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i>	27		No
28	Was the organization a party to a business transaction with one of the following parties? (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)			
a	A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>	28a		No
b	A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>	28b		No
c	An entity of which a current or former officer, director, trustee, or key employee of the organization (or a family member) was an officer, director, trustee, or owner? <i>If "Yes," complete Schedule L, Part IV</i>	28c		No
29	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>	29		No
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>	30		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>	31		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>	32		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>	33	Yes	
34	Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1</i>	34	Yes	
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>	35		No
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>	36		
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>	37		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? Note. All Form 990 filers are required to complete Schedule O	38	Yes	

Part V

Statements Regarding Other IRS Filings and Tax Compliance

			Yes	No
1a	Enter the number reported in Box 3 of Form 1096, <i>Annual Summary and Transmittal of U.S. Information Returns</i> . Enter -0- if not applicable	1a28		
	b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?			1c	
2a	Enter the number of employees reported on Form W-3, <i>Transmittal of Wage and Tax Statements</i> filed for the calendar year ending with or within the year covered by this return	2a161	2b	Yes
	b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note: If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return (see instructions)			
3a Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?			3a	Yes
b If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O			3b	Yes
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?			4a	No
b If "Yes," enter the name of the foreign country: <input type="text"/> See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts				
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . . .			5a	No
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?			5b	No
c If "Yes" to line 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?			5c	
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?			6a	No
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?			6b	
7 Organizations that may receive deductible contributions under section 170(c).				
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?			7a	
b If "Yes," did the organization notify the donor of the value of the goods or services provided?			7b	
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?			7c	
d If "Yes," indicate the number of Forms 8282 filed during the year			7d	
e Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			7e	
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . .			7f	
g For all contributions of qualified intellectual property, did the organization file Form 8899 as required? . . .			7g	
h For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?			7h	
8 Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?			8	
9 Sponsoring organizations maintaining donor advised funds.				
a Did the organization make any taxable distributions under section 4966?			9a	
b Did the organization make a distribution to a donor, donor advisor, or related person?			9b	
10 Section 501(c)(7) organizations. Enter				
a Initiation fees and capital contributions included on Part VIII, line 12			10a	
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities			10b	
11 Section 501(c)(12) organizations. Enter				
a Gross income from members or shareholders			11a	
b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)			11b	
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?			12a	
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year			12b	

Part VI

Governance, Management, and Disclosure

For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Section A. Governing Body and Management

			Yes	No
1a	Enter the number of voting members of the governing body . . .	1a	25	
b	Enter the number of voting members that are independent . . .	1b	24	
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2		No
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person? . . .	3		No
4	Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?	4	Yes	
5	Did the organization become aware during the year of a material diversion of the organization's assets? . . .	5		No
6	Does the organization have members or stockholders?	6		No
7a	Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	7a		No
b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons? . . .	7b		No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following			
a	The governing body?	8a	Yes	
b	Each committee with authority to act on behalf of the governing body?	8b	Yes	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	9		No

Section B. Policies

(This Section B requests information about policies not required by the Internal Revenue Code.)

			Yes	No
10a	Does the organization have local chapters, branches, or affiliates?	10a	Yes	
b	If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?	10b	Yes	
11	Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	11	Yes	
11A	Describe in Schedule O the process, if any, used by the organization to review the Form 990			
12a	Does the organization have a written conflict of interest policy? If "No," go to line 13	12a	Yes	
b	Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes	
c	Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done	12c	Yes	
13	Does the organization have a written whistleblower policy?	13	Yes	
14	Does the organization have a written document retention and destruction policy?	14	Yes	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a	The organization's CEO, Executive Director, or top management official	15a	Yes	
b	Other officers or key employees of the organization	15b	Yes	
	If "Yes" to line a or b, describe the process in Schedule O (See instructions)			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		No
b	If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?	16b		

Section C. Disclosure

17	List the States with which a copy of this Form 990 is required to be filed▶
18	Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c) (3)s only) available for public inspection. Indicate how you make these available. Check all that apply. <input type="checkbox"/> Own website <input type="checkbox"/> Another's website <input checked="" type="checkbox"/> Upon request
19	Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public. See Additional Data Table.
20	State the name, physical address, and telephone number of the person who possesses the books and records of the organization ▶ Martin Childs PO BOX 12159 salem, OR 97309 (503) 581-1505

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

• List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations

☐ Check this box if the organization did not compensate any current or former officer, director, trustee or key employee

[illegible]

1b	Total	443,157	0	123,327
----	-------	---------	---	---------

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization 0

		Yes	No
3	Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>	3 Yes	
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	4	No
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>	5	No

Section B. Independent Contractors

1	Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization		
	(A) Name and business address	(B) Description of services	(C) Compensation
2	Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization 0		

Part VIII

Statement of Revenue

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514	
Contributions, gifts, grants and other similar amounts	1a	Federated campaigns . . .	1a					
	b	Membership dues	1b	22,247,620				
	c	Fundraising events	1c					
	d	Related organizations	1d					
	e	Government grants (contributions)	1e					
	f	All other contributions, gifts, grants, and similar amounts not included above	1f					
	g	Noncash contributions included in lines 1a-1f \$ _____						
	h	Total. Add lines 1a-1f		22,247,620				
Program Service Revenue			Business Code					
	2a	_____	900,099	746,904	746,904			
	b	MISCELLANEOUS INCOME	900,099	22,011	22,011			
	c	_____						
	d	_____						
	e	_____						
	f	All other program service revenue						
	g	Total. Add lines 2a-2f		768,915				
Other Revenue	3	Investment income (including dividends, interest and other similar amounts)		302,947			302,947	
	4	Income from investment of tax-exempt bond proceeds . . .						
	5	Royalties						
	6a	Gross Rents	(i) Real	(ii) Personal				
	b	Less rental expenses						
	c	Rental income or (loss)						
	d	Net rental income or (loss)						
	7a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
			3,403,582					
			3,501,768	195,492				
			-98,186	-195,492				
	d	Net gain or (loss)		-293,678	-293,678			
	8a	Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c) See Part IV, line 18	a					
			b	Less direct expenses	b			
	c	Net income or (loss) from fundraising events . . .						
	9a	Gross income from gaming activities See Part IV, line 19	a					
b			Less direct expenses	b				
c	Net income or (loss) from gaming activities . . .							
10a	Gross sales of inventory, less returns and allowances	a						
		b	Less cost of goods sold	b				
c	Net income or (loss) from sales of inventory . . .							
Miscellaneous Revenue		Business Code						
11a	SEIU Subsidiary	900,099	320,940	320,940				
b	INSURANCE COMMISSIONS	524,298	110,062		110,062			
c	_____							
d	All other revenue							
e	Total. Add lines 11a-11d		431,002					
12	Total revenue. See Instructions		23,456,806	796,177	110,062	302,947		

Part IX

Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.		(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to governments and organizations in the U S See Part IV, line 21	67,521			
2	Grants and other assistance to individuals in the U S See Part IV, line 22				
3	Grants and other assistance to governments, organizations, and individuals outside the U S See Part IV, lines 15 and 16				
4	Benefits paid to or for members	104,160			
5	Compensation of current officers, directors, trustees, and key employees	490,648			
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7	Other salaries and wages	8,742,160			
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	1,013,448			
9	Other employee benefits	131,793			
10	Payroll taxes	662,245			
11	Fees for services (non-employees)				
a	Management				
b	Legal	183,997			
c	Accounting	98,642			
d	Lobbying				
e	Professional fundraising See Part IV, line 17				
f	Investment management fees				
g	Other	6,215			
12	Advertising and promotion	3,449			
13	Office expenses	892,684			
14	Information technology				
15	Royalties				
16	Occupancy	322,225			
17	Travel	846,919			
18	Payments of travel or entertainment expenses for any federal, state, or local public officials				
19	Conferences, conventions, and meetings	224,089			
20	Interest				
21	Payments to affiliates	6,263,657			
22	Depreciation, depletion, and amortization	402,959			
23	Insurance	109,518			
24	Other expenses Itemize expenses not covered above (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below)				
a	INCOME TAXES	10			
b	ISSUES FUNDING	1,259,449			
c	ORGANIZING DEPARTMENT	908,746			
d	MEMBER GOVERNANCE	546,608			
e	TRAINING	160,409			
f	All other expenses	262,789			
25	Total functional expenses. Add lines 1 through 24f	23,704,340			
26	Joint costs. Check here <input type="checkbox"/> if following SOP 98-2 Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

Part X

Balance Sheet

					(A)		(B)
					Beginning of year		End of year
Assets	1	Cash—non-interest-bearing			441,311	1	381,686
	2	Savings and temporary cash investments			1,878,500	2	3,192,657
	3	Pledges and grants receivable, net				3	
	4	Accounts receivable, net			1,981,351	4	2,047,942
	5	Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L				5	
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) Complete Part II of Schedule L				6	
	7	Notes and loans receivable, net				7	
	8	Inventories for sale or use				8	
	9	Prepaid expenses and deferred charges			45,148	9	50,378
	10a	Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D	10a	7,015,740			
	b	Less accumulated depreciation	10b	3,287,553	4,190,842	10c	3,728,187
	11	Investments—publicly traded securities			7,358,750	11	7,519,907
	12	Investments—other securities See Part IV, line 11				12	
	13	Investments—program-related See Part IV, line 11				13	
	14	Intangible assets				14	
	15	Other assets See Part IV, line 11			553,701	15	620,900
16	Total assets. Add lines 1 through 15 (must equal line 34)			16,449,603	16	17,541,657	
Liabilities	17	Accounts payable and accrued expenses			1,793,016	17	1,911,386
	18	Grants payable				18	844,193
	19	Deferred revenue				19	
	20	Tax-exempt bond liabilities				20	
	21	Escrow or custodial account liability Complete Part IV of Schedule D				21	
	22	Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L				22	
	23	Secured mortgages and notes payable to unrelated third parties				23	
	24	Unsecured notes and loans payable to unrelated third parties				24	
	25	Other liabilities Complete Part X of Schedule D			564,135	25	312,687
	26	Total liabilities. Add lines 17 through 25			2,357,151	26	3,068,266
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.						
	27	Unrestricted net assets			14,092,452	27	14,473,391
	28	Temporarily restricted net assets				28	
	29	Permanently restricted net assets				29	
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.						
	30	Capital stock or trust principal, or current funds				30	
	31	Paid-in or capital surplus, or land, building or equipment fund				31	
	32	Retained earnings, endowment, accumulated income, or other funds				32	
	33	Total net assets or fund balances			14,092,452	33	14,473,391
34	Total liabilities and net assets/fund balances			16,449,603	34	17,541,657	

Part XI **Financial Statements and Reporting**

	Yes	No
1 Accounting method used to prepare the Form 990 <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? . . .		No
b Were the organization's financial statements audited by an independent accountant?	Yes	
c If "Yes," to 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O	Yes	
d If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a consolidated basis, separate basis, or both <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input checked="" type="checkbox"/> Both consolidated and separated basis		
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		No
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits . . .		

SCHEDULE C
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527

▶ **Complete if the organization is described below.**
▶ **Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.**

OMB No 1545-0047

2009

Open to Public Inspection

If the organization answered “Yes,” to Form 990, Part IV, Line 3, or Form 990-EZ, Part VI, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations Complete Parts I-A and B Do not complete Part I-C
- Section 501(c) (other than section 501(c)(3)) organizations Complete Parts I-A and C below Do not complete Part I-B
- Section 527 organizations Complete Part I-A only

If the organization answered “Yes,” to Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)) Complete Part II-A Do not complete Part II-B
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)) Complete Part II-B Do not complete Part II-A

If the organization answered “Yes,” to Form 990, Part IV, Line 5 (Proxy Tax) or Form 990-EZ, line 35a (regarding proxy tax), then

- Section 501(c)(4), (5), or (6) organizations Complete Part III

Name of the organization SEIU Local 503 Oregon Public Employees Union	Employer identification number 93-0323147
--	--

Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

1	Provide a description of the organization's direct and indirect political campaign activities in Part IV	
2	Political expenditures	▶ \$ 117,479
3	Volunteer hours	1,725

Part I-B Complete if the organization is exempt under section 501(c)(3).

1	Enter the amount of any excise tax incurred by the organization under section 4955	▶ \$
2	Enter the amount of any excise tax incurred by organization managers under section 4955	▶ \$
3	If the organization incurred a section 4955 tax, did it file Form 4720 for this year?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4a	Was a correction made?	<input type="checkbox"/> Yes <input type="checkbox"/> No
b	If "Yes," describe in Part IV	

Part I-C Complete if the organization is exempt under section 501(c) except section 501(c)(3).

1	Enter the amount directly expended by the filing organization for section 527 exempt function activities	▶ \$ 117,479
2	Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities	▶ \$
3	Total exempt function expenditures Add lines 1 and 2 Enter here and on Form 1120-POL, line 17b	▶ \$ 117,479
4	Did the filing organization file Form 1120-POL for this year?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
5	State the names, addresses and employer identification number (EIN) of all section 527 political organizations to which payments were made For each organization listed, enter the amount paid from the filing organization's funds Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC) If additional space is needed, provide information in Part IV	

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds If none, enter -0-	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization If none, enter -0-
CITIZEN ACTION FOR POLITICAL EDUCATION	PO BOX 12159 SALEM, OR 97309	23-7230166		645,597

Part II-A

Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

A

Check

☐

if the filing organization belongs to an affiliated group

B

Check

☐

if the filing organization checked box A and "limited control" provisions apply

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing Organization's Totals	(b) Affiliated Group Totals												
1a Total lobbying expenditures to influence public opinion (grass roots lobbying)															
b Total lobbying expenditures to influence a legislative body (direct lobbying)															
c Total lobbying expenditures (add lines 1a and 1b)															
d Other exempt purpose expenditures															
e Total exempt purpose expenditures (add lines 1c and 1d)															
f Lobbying nontaxable amount Enter the amount from the following table in both columns															
<table><tr><td>If the amount on line 1e, column (a) or (b) is:</td><td>The lobbying nontaxable amount is:</td></tr><tr><td>Not over \$500,000</td><td>20% of the amount on line 1e</td></tr><tr><td>Over \$500,000 but not over \$1,000,000</td><td>\$100,000 plus 15% of the excess over \$500,000</td></tr><tr><td>Over \$1,000,000 but not over \$1,500,000</td><td>\$175,000 plus 10% of the excess over \$1,000,000</td></tr><tr><td>Over \$1,500,000 but not over \$17,000,000</td><td>\$225,000 plus 5% of the excess over \$1,500,000</td></tr><tr><td>Over \$17,000,000</td><td>\$1,000,000</td></tr></table>		If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	Not over \$500,000	20% of the amount on line 1e	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000	Over \$17,000,000	\$1,000,000		
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:														
Not over \$500,000	20% of the amount on line 1e														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000														
Over \$17,000,000	\$1,000,000														
g Grassroots nontaxable amount (enter 25% of line 1f)															
h Subtract line 1g from line 1a If zero or less, enter -0-															
i Subtract line 1f from line 1c If zero or less, enter -0-															
j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?		<input type="checkbox"/> Yes	<input type="checkbox"/> No												

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 2a through 2f on page 4.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) Total
2a Lobbying non-taxable amount					
b Lobbying ceiling amount (150% of line 2a, column(e))					
c Total lobbying expenditures					
d Grassroots non-taxable amount					
e Grassroots ceiling amount (150% of line 2d, column (e))					
f Grassroots lobbying expenditures					

Part II-B

Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

		(a)		(b)
		Yes	No	Amount
1	During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of			
	a Volunteers?			
	b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?			
	c Media advertisements?			
	d Mailings to members, legislators, or the public?			
	e Publications, or published or broadcast statements?			
	f Grants to other organizations for lobbying purposes?			
	g Direct contact with legislators, their staffs, government officials, or a legislative body?			
	h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?			
	i Other activities? If "Yes," describe in Part IV			
	j Total lines 1c through 1i			
	2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?			
	b If "Yes," enter the amount of any tax incurred under section 4912			
	c If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
	d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A

Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

		Yes	No
1	Were substantially all (90% or more) dues received nondeductible by members?	1	Yes
2	Did the organization make only in-house lobbying expenditures of \$2,000 or less?	2	No
3	Did the organization agree to carryover lobbying and political expenditures from the prior year?	3	No

Part III-B

Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) if BOTH Part III-A, lines 1 and 2 are answered "No" OR if Part III-A, line 3 is answered "Yes".

1	Dues, assessments and similar amounts from members	1	
2	Section 162(e) non-deductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).		
a	Current year	2a	
b	Carryover from last year	2b	
c	Total	2c	
3	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	
4	If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4	
5	Taxable amount of lobbying and political expenditures (see instructions)	5	

Part IV

Supplemental Information

Complete this part to provide the descriptions required for Part I-A, line 1, Part I-B, line 4, Part I-C, line 5, and Part II-B, line 1i. Also, complete this part for any additional information.

Identifier	Return Reference	Explanation
Part I-A, Line 1	Organizations Direct and Indirect Political Campaign Activities	The organization informs members of political issues through internal communications, some members assist candidates or ballot measures through volunteer activities, and the organization contributes, upon board action, to ballot measure campaigns of direct interest to our membership.
Part IV, Supplemental Information		part iii-a SEIU Local 503 oregon public employees union is a labor union and is specifically exempt from the requirement to report lobbying expenses to the membership as a nondeductible portion of their dues, per Rev Proc 98-19

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ **Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.**
▶ **Attach to Form 990. ▶ See separate instructions.**

OMB No 1545-0047

2009

Open to Public Inspection

Name of the organization SEIU Local 503 Oregon Public Employees Union	Employer identification number 93-0323147
---	---

Part I

Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year	
2	Aggregate contributions to (during year)	
3	Aggregate grants from (during year)	
4	Aggregate value at end of year	
5	Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? <div><input type="checkbox"/> Yes <input type="checkbox"/> No</div>	
6	Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit <div><input type="checkbox"/> Yes <input type="checkbox"/> No</div>	

Part II

Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1	Purpose(s) of conservation easements held by the organization (check all that apply) <div><input type="checkbox"/> Preservation of land for public use (e g , recreation or pleasure) <input type="checkbox"/> Preservation of an historically importantly land area</div> <div><input type="checkbox"/> Protection of natural habitat <input type="checkbox"/> Preservation of a certified historic structure</div> <div><input type="checkbox"/> Preservation of open space</div>											
2	Complete lines 2a–2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year											
		<table><tr><td></td><td>Held at the End of the Year</td></tr><tr><td>a</td><td>Total number of conservation easements</td></tr><tr><td>b</td><td>Total acreage restricted by conservation easements</td></tr><tr><td>c</td><td>Number of conservation easements on a certified historic structure included in (a)</td></tr><tr><td>d</td><td>Number of conservation easements included in (c) acquired after 8/17/06</td></tr></table>		Held at the End of the Year	a	Total number of conservation easements	b	Total acreage restricted by conservation easements	c	Number of conservation easements on a certified historic structure included in (a)	d	Number of conservation easements included in (c) acquired after 8/17/06
	Held at the End of the Year											
a	Total number of conservation easements											
b	Total acreage restricted by conservation easements											
c	Number of conservation easements on a certified historic structure included in (a)											
d	Number of conservation easements included in (c) acquired after 8/17/06											
3	Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ▶ _____											
4	Number of states where property subject to conservation easement is located ▶ _____											
5	Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? <div><input type="checkbox"/> Yes <input type="checkbox"/> No</div>											
6	Staff and volunteer hours devoted to monitoring, inspecting and enforcing conservation easements during the year ▶ _____											
7	Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$ _____											
8	Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and 170(h)(4)(B)(ii)? <div><input type="checkbox"/> Yes <input type="checkbox"/> No</div>											
9	In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements											

Part III

Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a	If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items	
b	If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items	
	(i) Revenues included in Form 990, Part VIII, line 1	▶ \$ _____
	(ii) Assets included in Form 990, Part X	▶ \$ _____
2	If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items	
a	Revenues included in Form 990, Part VIII, line 1	▶ \$ _____
b	Assets included in Form 990, Part X	▶ \$ _____

Part III

Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3

Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply)

a

☐

Public exhibition

b

☐

Scholarly research

c

☐

Preservation for future generations

d

☐

Loan or exchange programs

e

☐

Other

4

Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV

5

During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?

☐ Yes

☐ No

Part IV

Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a

Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?

☐ Yes

☐ No

1b

If "Yes," explain the arrangement in Part XIV and complete the following table

	Amount
1c	
1d	
1e	
1f	

2a

Did the organization include an amount on Form 990, Part X, line 21?

☐ Yes

☐ No

2b

If "Yes," explain the arrangement in Part XIV

Part V

Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

	(a)Current Year	(b)Prior Year	(c)Two Years Back	(d)Three Years Back	(e)Four Years Back
1a	Beginning of year balance				
1b	Contributions				
1c	Investment earnings or losses				
1d	Grants or scholarships				
1e	Other expenditures for facilities and programs				
1f	Administrative expenses				
1g	End of year balance				

2

Provide the estimated percentage of the year end balance held as

a

Board designated or quasi-endowment ▶

b

Permanent endowment ▶

c

Term endowment ▶

3a

Are there endowment funds not in the possession of the organization that are held and administered for the organization by

(i)

unrelated organizations

3a(i)

Yes

No

(ii)

related organizations

3a(ii)

Yes

No

b

If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?

3b

Yes

No

4

Describe in Part XIV the intended uses of the organization's endowment funds

Part VI

Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		474,900		474,900
1b Buildings		4,159,622	1,395,817	2,763,805
1c Leasehold improvements				
1d Equipment		2,381,218	1,891,736	489,482
1e Other				
Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) ▶				3,728,187

Part XI

Reconciliation of Change in Net Assets from Form 990 to Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	23,456,806
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	23,704,340
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	-247,534
4	Net unrealized gains (losses) on investments	4	307,391
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	321,082
9	Total adjustments (net) Add lines 4 - 8	9	628,473
10	Excess or (deficit) for the year per financial statements Combine lines 3 and 9	10	380,939

Part XII

Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements	1	24,016,357
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12		
a	Net unrealized gains on investments	2a	307,391
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	542,196
e	Add lines 2a through 2d	2e	849,587
3	Subtract line 2e from line 1	3	23,166,770
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	290,036
c	Add lines 4a and 4b	4c	290,036
5	Total Revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12)	5	23,456,806

Part XIII

Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1	23,993,017
2	Amounts included on line 1 but not on Form 990, Part IX, line 25		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV)	2d	542,196
e	Add lines 2a through 2d	2e	542,196
3	Subtract line 2e from line 1	3	23,450,821
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	253,519
c	Add lines 4a and 4b	4c	253,519
5	Total expenses Add lines 3 and 4c. (This should equal Form 990, Part I, line 18)	5	23,704,340

Part XIV

Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, Part XI, line 8, Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

Identifier	Return Reference	Explanation
Part XI, Line 8 - Other Adjustments		beginning of year net assets of locals in group return
Part XII, Line 2d - Other Adjustments		netting of rental income from disregarded entity with expenses 63000 Loss on disposal of fixed assets 195491 elimination of income on consolidation 283705
Part XII, Line 4b - Other Adjustments		income from locals included in group return 290036
Part XIII, Line 2d - Other Adjustments		netting of rental income from disregarded entity with expenses 63000 expenses reduced on consolidation 283705 loss on disposal of fixed assets 195491
Part XIII, Line 4b - Other Adjustments		expenses from locals included in group return 253519

Schedule I
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization
SEIU Local 503 Oregon Public Employees Union

Grants and Other Assistance to Organizations,
Governments and Individuals in the United States

Complete if the organization answered "Yes," to Form 990, Part IV, line 21 or 22.
▶ Attach to Form 990

OMB No 1545-0047

2009

Open to Public
Inspection

Employer identification number
93-0323147

Part I

General Information on Grants and Assistance

- 1

Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

☒ Yes ☐ No
- 2

Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II

Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21 for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use Part IV and Schedule I-1 (Form 990) if additional space is needed ▶ ☐

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
PORTLAND JOBS WITH JUSTICE6025 E BURNSIDE PORTLAND,OR 97215	931120523	501(c)(4)	6,650		n/a	N/A	to promote workers rights
PINEROS Y CAMPESINOS UNIDOS DEL NOROESTE 300 YOUNG ST WOODBURN,OR 97071	930939941	501(c)(5)	6,503		n/a	N/A	to promote farm workers rights
oregon center for public policyPO Box 7 Silverton,OR 97381	931186075	501(c)(3)	18,750		n/a	n/A	to improve economic and social opportunities for workers
1199 STRIKE AND DEFENSE FUND77 HUYSHOPE AVE HARTFORD,CT 06106	060991885	501(c)(5)	5,000		n/a	n/A	strike support

2

Enter total number of section 501(c)(3) and government organizations

▶

3

Enter total number of other organizations

▶

Schedule J
(Form 990)

Compensation Information

OMB No 1545-0047

2009

Open to Public Inspection

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Complete if the organization answered "Yes" to Form 990, Part IV, question 23.

▶ Attach to Form 990. ▶ See separate instructions.

Name of the organization

SEIU Local 503 Oregon Public Employees Union

Employer identification number

93-0323147

Part I

Questions Regarding Compensation

	Yes	No
<div><div>1a</div><div>Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a Complete Part III to provide any relevant information regarding these items</div><div><div><div><input type="checkbox"/> First-class or charter travel</div><div><input type="checkbox"/> Travel for companions</div><div><input type="checkbox"/> Tax idemnification and gross-up payments</div><div><input type="checkbox"/> Discretionary spending account</div></div><div><div><input type="checkbox"/> Housing allowance or residence for personal use</div><div><input type="checkbox"/> Payments for business use of personal residence</div><div><input type="checkbox"/> Health or social club dues or initiation fees</div><div><input type="checkbox"/> Personal services (e g , maid, chauffeur, chef)</div></div></div></div>		
<div><div>1b</div><div>If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all the expenses described above? If "No," complete Part III to explain</div></div>		
<div><div>2</div><div>Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?</div></div>		
<div><div>3</div><div>Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director Check all that apply</div><div><div><input checked="" type="checkbox"/> Compensation committee</div><div><input type="checkbox"/> Independent compensation consultant</div><div><input type="checkbox"/> Form 990 of other organizations</div><div><input checked="" type="checkbox"/> Written employment contract</div><div><input type="checkbox"/> Compensation survey or study</div><div><input type="checkbox"/> Approval by the board or compensation committee</div></div></div>		
<div><div>4</div><div>During the year, did any person listed in Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization</div></div>		
<div><div>4a</div><div>Receive a severance payment or change-of-control payment?</div></div>		No
<div><div>4b</div><div>Participate in, or receive payment from, a supplemental nonqualified retirement plan?</div></div>		No
<div><div>4c</div><div>Participate in, or receive payment from, an equity-based compensation arrangement?</div></div> <div>If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III</div>		No
<div><div></div><div>Only 501(c)(3) and 501(c)(4) organizations only must complete lines 5-9.</div></div>		
<div><div>5</div><div>For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of</div></div>		
<div><div>5a</div><div>The organization?</div></div>		
<div><div>5b</div><div>Any related organization?</div></div> <div>If "Yes," to line 5a or 5b, describe in Part III</div>		
<div><div>6</div><div>For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of</div></div>		
<div><div>6a</div><div>The organization?</div></div>		
<div><div>6b</div><div>Any related organization?</div></div> <div>If "Yes," to line 6a or 6b, describe in Part III</div>		
<div><div>7</div><div>For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III</div></div>		
<div><div>8</div><div>Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs section 53 4958-4(a)(3)? If "Yes," describe in Part III</div></div>		
<div><div>9</div><div>If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53 4958-6(c)?</div></div>		

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

Note. The sum of columns (B)(i)-(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a

[illegible]

Part III **Supplemental Information**

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8. Also complete this part for any additional information.

Identifier	Return Reference	Explanation
------------	------------------	-------------

SCHEDULE O

(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

Complete to provide information for responses to specific questions on
Form 990 or to provide any additional information.
▶ Attach to Form 990.

OMB No 1545-0047

2009

Open to Public
Inspection

Name of the organization SEIU Local 503 Oregon Public Employees Union	Employer identification number 93-0323147
---	---

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 4		See attached updated documents

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 33, 34, 35, 36, or 37.
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2009

Open to Public Inspection

Name of the organization

SEIU Local 503 Oregon Public Employees Union

Employer identification number

93-0323147

Part I Identification of Disregarded Entities (Complete if the organization answered "Yes" on Form 990, Part IV, line 33.)					
(a) Name, address, and EIN of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
HEMOCARE UNION BENEFITS BOARD LLC PO BOX 12159 SALEM, OR 97309 20-0573997	Administration of the insurance program for Oregon Homecare Workers	OR	-6,996	830,622	SEIU Local 503 - OPEU

Part II Identification of Related Tax-Exempt Organizations (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.)					
(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity
OREGON STATE COUNCIL 6401 SE FOSTER RD PORTLAND, OR 97206 93-0887838	POLITICAL LOBBYING	OR	527		N/A
OREGON POLITICAL ACTION COMMITTEE(OPAC) 1730 COMMERCIAL ST SE SALEM, OR 97302 93-0323147	BALLOT MEASURES	OR	527		SEIU Local 503 - OPEU
CITIZEN ACTION FOR POLITICAL EDUCATION(CAPE) 1730 COMMERCIAL ST SE SALEM, OR 97309 23-7230166	POLITICAL EDUCATION	OR	527		SEIU Local 503 - OPEU

Part III

Identification of Related Organizations Taxable as a Partnership (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512- 514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?	
							Yes	No		Yes	No

Part IV

Identification of Related Organizations Taxable as a Corporation or Trust (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership

Part V

Transactions With Related Organizations (Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35, or 36.)

Note. Complete line 1 if any entity is listed in Parts II, III or IV

1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

a Receipt of (i) interest (ii) annuities (iii) royalties (iv) rent from a controlled entity

b Gift, grant, or capital contribution to other organization(s)

c Gift, grant, or capital contribution from other organization(s)

d Loans or loan guarantees to or for other organization(s)

e Loans or loan guarantees by other organization(s)

f Sale of assets to other organization(s)

g Purchase of assets from other organization(s)

h Exchange of assets

i Lease of facilities, equipment, or other assets to other organization(s)

j Lease of facilities, equipment, or other assets from other organization(s)

k Performance of services or membership or fundraising solicitations for other organization(s)

l Performance of services or membership or fundraising solicitations by other organization(s)

m Sharing of facilities, equipment, mailing lists, or other assets

n Sharing of paid employees

o Reimbursement paid to other organization for expenses

p Reimbursement paid by other organization for expenses

q Other transfer of cash or property to other organization(s)

r Other transfer of cash or property from other organization(s)

Yes

No

1a

1b

1c

1d

1e

1f

1g

1h

1i

1j

1k

1l

1m

1n

1o

1p

1q

1r

No

No

No

No

No

No

No

No

No

No

No

No

Yes

Yes

No

No

Yes

No

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

(a) Name of other organization	(b) Transaction type(a-r)	(c) Amount involved
(1) Oregon State Council	Q	187,702
(1) See Additional Data Table		
(2)		
(3)		
(4)		
(5)		
(6)		

Schedule R (Form 990) 2009

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

[illegible]

TY 2009 Affiliate Listing

Name: SEIU Local 503 Oregon Public Employees Union
EIN: 93-0323147

Name	Address	EIN	Name control
SERVICE EMPLOYEES INTERNATIONAL 001 LOCAL RETIREES	PO BOX 12159 SALEM, OR 97309	93-1058552	SERV
SERVICE EMPLOYEES INTERNATIONAL 81 LOCAL EOU CLASSIFIED	PO BOX 12159 SALEM, OR 97309	93-0813995	SERV
SERVICE EMPLOYEES INTERNATIONAL 82 LOCAL WOU CLASSIFIED	PO BOX 12159 SALEM, OR 97309	93-0813997	SERV
SERVICE EMPLOYEES INTERNATIONAL 83 LOCAL OSU CLASSIFIED	PO BOX 12159 SALEM, OR 97309	93-0810660	SERV
SERVICE EMPLOYEES INTERNATIONAL 84 LOCAL SOU CLASSIFIED	PO BOX 12159 SALEM, OR 97309	93-0814225	SERV
SERVICE EMPLOYEES INTERNATIONAL 85 LOCAL UO CLASSIFIED	PO BOX 12159 SALEM, OR 97309	93-0814226	SERV
SERVICE EMPLOYEES INTERNATIONAL 89 LOCAL PSU CLASSIFIED	PO BOX 12159 SALEM, OR 97309	93-0814227	SERV
SERVICE EMPLOYEES INTERNATIONAL 90 LOCAL OIT CLASSIFIED	PO BOX 12159 SALEM, OR 97309	93-0814228	SERV
SERVICE EMPLOYEES INTERNATIONAL 96 LOCAL CHILD CARE WORKERS	PO BOX 12159 SALEM, OR 97309	90-0333761	SERV
SERVICE EMPLOYEES INTERNATIONAL 97 LOCAL MEADOW PARK CARE CENTER	PO BOX 12159 SALEM, OR 97309	51-0208091	SERV
SERVICE EMPLOYEES INTERNATIONAL 98 ADDUS	PO BOX 12159 SALEM, OR 97309	23-7124436	SERV
SERVICE EMPLOYEES INTERNATIONAL 108 LOCAL OHCS	PO BOX 12159 SALEM, OR 97309	90-0103701	SERV
SERVICE EMPLOYEES INTERNATIONAL 109 LOCAL ODFW	PO BOX 12159 SALEM, OR 97309	90-0103707	SERV
SERVICE EMPLOYEES INTERNATIONAL 125 LOCAL ADMIN SERVICES	PO BOX 12159 SALEM, OR 97309	93-0814229	SERV
SERVICE EMPLOYEES INTERNATIONAL 137 LOCAL JUSTICE	PO BOX 12159 SALEM, OR 97309	93-0814230	SERV

Name	Address	EIN	Name control
SERVICE EMPLOYEES INTERNATIONAL 140 NUTRITION Srvc employees	PO BOX 12159 SALEM, OR 97309	90-0429731	SERV
SERVICE EMPLOYEES INTERNATIONAL 150 LOCAL REVENUE	PO BOX 12159 SALEM, OR 97309	93-0810696	SERV
SERVICE EMPLOYEES INTERNATIONAL 170 LOCAL TREASURY	PO BOX 12159 SALEM, OR 97309	93-0810690	SERV
SERVICE EMPLOYEES INTERNATIONAL 198 LOCAL CITY OF BEAVERTON	PO BOX 12159 SALEM, OR 97309	93-0810522	SERV
SERVICE EMPLOYEES INTERNATIONAL 199 LOCAL CITY OF TIGARD	PO BOX 12159 SALEM, OR 97309	93-0810693	SERV
SERVICE EMPLOYEES INTERNATIONAL 274 LOCAL VETS AFFAIRS	PO BOX 12159 SALEM, OR 97309	93-0814232	SERV
SERVICE EMPLOYEES INTERNATIONAL 294 LOCAL MARION COUNTY	PO BOX 12159 SALEM, OR 97309	93-0810700	SERV
SERVICE EMPLOYEES INTERNATIONAL 333 LOCAL HEALTH DIVISION	PO BOX 12159 SALEM, OR 97309	93-0829199	SERV
SERVICE EMPLOYEES INTERNATIONAL 390 LOCAL LINN COUNTY EMPLOYEES	PO BOX 12159 SALEM, OR 97309	93-1101521	SERV
SERVICE EMPLOYEES INTERNATIONAL 391 LOCAL ASSN LOCAL EOH & TC	PO BOX 12159 SALEM, OR 97309	93-0814268	SERV
SERVICE EMPLOYEES INTERNATIONAL 392 LOCAL O S H	PO BOX 12159 SALEM, OR 97309	93-0810702	SERV
SERVICE EMPLOYEES INTERNATIONAL 393 PENDLETON COTTAGE	PO BOX 12159 SALEM, OR 97309	90-0595717	SERV
SERVICE EMPLOYEES INTERNATIONAL 415 LOCAL OREGON YOUTH AUTHORITY	PO BOX 12159 SALEM, OR 97309	93-1247814	SERV
SERVICE EMPLOYEES INTERNATIONAL 440 LOCAL DEPT OF INS & FINANCE	PO BOX 12159 SALEM, OR 97309	93-0814241	SERV
SERVICE EMPLOYEES INTERNATIONAL 459 LOCAL PERS	PO BOX 12159 SALEM, OR 97309	93-0810708	SERV

Name	Address	EIN	Name control
SERVICE EMPLOYEES INTERNATIONAL 471 LOCAL EMPLOYMENT	PO BOX 12159 SALEM, OR 97309	93-0814246	SERV
SERVICE EMPLOYEES INTERNATIONAL 496 LOCAL JOSEPHINE CO ROADS DEPT	PO BOX 12159 SALEM, OR 97309	93-0814247	SERV
SERVICE EMPLOYEES INTERNATIONAL 497 LOCAL JACKSON COUNTY EMPLOYEES	PO BOX 12159 SALEM, OR 97309	93-0814249	SERV
SERVICE EMPLOYEES INTERNATIONAL 501 LOCAL CASCADE AIDS PROJECT	PO BOX 12159 SALEM, OR 97309	93-1247812	SERV
SERVICE EMPLOYEES INTERNATIONAL 543 LOCAL STATE LIBRARY	PO BOX 12159 SALEM, OR 97309	93-0810710	SERV
SERVICE EMPLOYEES INTERNATIONAL 570 LOCAL OPB	PO BOX 12159 SALEM, OR 97309	93-0814252	SERV
SERVICE EMPLOYEES INTERNATIONAL 575 LOCAL OREGON STUDENT ASSIST COM	PO BOX 12159 SALEM, OR 97309	93-1058554	SERV
SERVICE EMPLOYEES INTERNATIONAL 581 LOCAL EDUCATION	PO BOX 12159 SALEM, OR 97309	93-0814254	SERV
SERVICE EMPLOYEES INTERNATIONAL 585 LOCAL BLIND COMMISSION	PO BOX 12159 SALEM, OR 97309	93-0810711	SERV
SERVICE EMPLOYEES INTERNATIONAL 592 LOCAL COID	PO BOX 12159 SALEM, OR 97309	93-0810716	SERV
SERVICE EMPLOYEES INTERNATIONAL 593 LOCAL ONTARIO POLICE OFFICERS	PO BOX 12159 SALEM, OR 97309	93-0810526	SERV
SERVICE EMPLOYEES INTERNATIONAL 596 LOCAL BAKER COUNTY	PO BOX 12159 SALEM, OR 97309	93-0810520	SERV
SERVICE EMPLOYEES INTERNATIONAL 603 LOCAL AGRICULTURE	PO BOX 12159 SALEM, OR 97309	93-0810717	SERV
SERVICE EMPLOYEES INTERNATIONAL 622 LOCAL STATE FAIR	PO BOX 12159 SALEM, OR 97309	93-0814257	SERV
SERVICE EMPLOYEES INTERNATIONAL 629 LOCAL FORESTRY	PO BOX 12159 SALEM, OR 97309	93-0810524	SERV

Name	Address	EIN	Name control
SERVICE EMPLOYEES INTERNATIONAL 690 LOCAL WATER RESOURCES	PO BOX 12159 SALEM, OR 97309	93-0814262	SERV
SERVICE EMPLOYEES INTERNATIONAL 697 LOCAL COOS BAY N BEND WATER CO	PO BOX 12159 SALEM, OR 97309	93-0814263	SERV
SERVICE EMPLOYEES INTERNATIONAL 730 LOCAL ODOT	PO BOX 12159 SALEM, OR 97309	93-0814266	SERV
SERVICE EMPLOYEES INTERNATIONAL 733 LOCAL PARKS & RECREATION	PO BOX 12159 SALEM, OR 97309	93-1116637	SERV
SERVICE EMPLOYEES INTERNATIONAL 735 LOCAL DMV	PO BOX 12159 SALEM, OR 97309	93-0810719	SERV
SERVICE EMPLOYEES INTERNATIONAL 777 LOCAL BASIN TRANSIT SERVICE	PO BOX 12159 SALEM, OR 97309	93-1101523	SERV
SERVICE EMPLOYEES INTERNATIONAL 839 LOCAL BUREAU OF LABOR & INDSTRS	PO BOX 12159 SALEM, OR 97309	93-0810721	SERV
SERVICE EMPLOYEES INTERNATIONAL 858 ADULT FOSTER CARE	PO BOX 12159 SALEM, OR 97309	90-0429732	SERV
SERVICE EMPLOYEES INTERNATIONAL 902 LOCAL OSLP	PO BOX 12159 SALEM, OR 97309	93-1247815	SERV
SERVICE EMPLOYEES INTERNATIONAL 903 ROSEMONT treatment center	PO BOX 12159 SALEM, OR 97309	90-0429734	SERV
SERVICE EMPLOYEES INTERNATIONAL 904 LOCAL THE CHILD CENTER	PO BOX 12159 SALEM, OR 97309	93-1270770	SERV
SERVICE EMPLOYEES INTERNATIONAL 905 LOCAL NW REGIONAL EDUCATIONAL L	PO BOX 12159 SALEM, OR 97309	90-0037693	SERV
SERVICE EMPLOYEES INTERNATIONAL 908 LOCAL LCOG	PO BOX 12159 SALEM, OR 97309	90-0103706	SERV
SERVICE EMPLOYEES INTERNATIONAL 910 LOCAL CITY OF THE DALLES	PO BOX 12159 SALEM, OR 97309	93-1058556	SERV
SERVICE EMPLOYEES INTERNATIONAL 921 LOCAL CITY OF CANNON BEACH	PO BOX 12159 SALEM, OR 97309	93-1058558	SERV

Name	Address	EIN	Name control
SERVICE EMPLOYEES INTERNATIONAL 923 LOCAL WALLOWA COUNTY ROADS	PO BOX 12159 SALEM, OR 97309	93-1247818	SERV
SERVICE EMPLOYEES INTERNATIONAL 924 LOCAL WALLOWA COUNTY COURTS	PO BOX 12159 SALEM, OR 97309	93-1247819	SERV
SERVICE EMPLOYEES INTERNATIONAL 926 LOCAL CITY OF WILSONVILLE	PO BOX 12159 SALEM, OR 97309	94-3163987	SERV
SERVICE EMPLOYEES INTERNATIONAL 937 LOCAL OR CASCADE WEST COG	PO BOX 12159 SALEM, OR 97309	93-1058562	SERV
SERVICE EMPLOYEES INTERNATIONAL 938 LOCAL CITY OF PENDLETON	PO BOX 12159 SALEM, OR 97309	93-1058564	SERV
SERVICE EMPLOYEES INTERNATIONAL 955 LOCAL UMATILLA CITY POLICE	PO BOX 12159 SALEM, OR 97309	93-1058570	SERV
SERVICE EMPLOYEES INTERNATIONAL 963 LOCAL CODA	PO BOX 12159 SALEM, OR 97309	93-1116636	SERV
SERVICE EMPLOYEES INTERNATIONAL 971 LOCAL PRESTIGE CARE	PO BOX 12159 SALEM, OR 97309	90-0243247	SERV
SERVICE EMPLOYEES INTERNATIONAL 972 LOCAL EVERGREEN OREGON HEALTH C	PO BOX 12159 SALEM, OR 97309	90-0243250	SERV
SERVICE EMPLOYEES INTERNATIONAL 973 LOCAL AVAMERE	PO BOX 12159 SALEM, OR 97309	90-0239062	SERV
SERVICE EMPLOYEES INTERNATIONAL 974 LOCAL PINNACLE CARE	PO BOX 12159 SALEM, OR 97309	90-0285770	SERV
SERVICE EMPLOYEES INTERNATIONAL 976 EAGLE HEALTH care inc	PO BOX 12159 SALEM, OR 97309	90-0429733	SERV
SERVICE EMPLOYEES INTERNATIONAL 978 FARMINGTON NURSING HOME	PO BOX 12159 SALEM, OR 97309	90-0595724	SERV
SERVICE EMPLOYEES INTERNATIONAL 985 LOCAL CURRY COUNTY	PO BOX 12159 SALEM, OR 97309	93-1146570	SERV
SERVICE EMPLOYEES INTERNATIONAL 987 LOCAL PARRY CENTER	PO BOX 12159 SALEM, OR 97309	93-1247821	SERV

Name	Address	EIN	Name control
SERVICE EMPLOYEES INTERNATIONAL 995 LOCAL CITY OF SPRINGFIELD	PO BOX 12159 SALEM, OR 97309	93-1146569	SERV
SERVICE EMPLOYEES INTERNATIONAL 999 LOCAL ALVORD TAYLOR	PO BOX 12159 SALEM, OR 97309	93-1296313	SERV

BYLAWS

SEIU LOCAL 503, OREGON PUBLIC EMPLOYEES UNION



INDEX

ARTICLE		Page
I	NAME	1
II	PURPOSE	1
III	MEMBERSHIP	1
	Active Membership	1
	Semi-Active Membership	2
	Associate Membership	2
	Retiree Membership	3
	Staff Membership	3
IV	LOCALS	4
V	MEMBER BILL OF RIGHTS AND RESPONSIBILITIES IN THE UNION AND ON THE JOB	5
VI	MISCONDUCT OF MEMBERS	6
VII	RESPONSIBILITIES OF OFFICERS AND DIRECTORS	8
VIII	GOVERNANCE OF THE UNION	9
IX	THE GENERAL COUNCIL	10
X	CONVENTIONS	15
XI	BOARD OF DIRECTORS	16
XII	EXECUTIVE COMMITTEE	19
XIII	STATEWIDE OFFICERS	19
XIV	DUTIES OF STATEWIDE OFFICERS	20
	President	20
	Immediate Past President	21
	Vice President	22
	Secretary-Treasurer	22
	Executive Director	23
XV	ELECTIONS	24
	General Provisions	25
	Challenges to Elections	26
	Special Rules for Statewide Officer Elections	28
	Special Rules for Election of Directors and Assistant Directors	30
	Special Rules for Elections in Locals	32
	Election of Delegate Alternates	33
XVI	UNION STEWARDS	33
XVII	COMMITTEES	34
XVIII	COMMUNITY ACTION CENTERS	36
XIX	DUES	37

INDEX

ARTICLE		Page
XX	FIDUCIARY RESPONSIBILITIES AND BONDING	38
XXI	GENERAL FINANCIAL MATTERS	39
XXII	CENTRAL LEDGER AND LOCAL FUNDING	40
XXIII	INACTIVATION OF LOCALS	42
XXIV	TRUSTEESHIP OF LOCALS	43
XXV	LEGAL COMPLIANCE	44
XXVI	POLITICAL ACTION PROGRAM	45
XXVII	NO DISCRIMINATION	45
XXVIII	AMENDMENT OF BYLAWS	45
XXIX	PARLIAMENTARY AUTHORITY	46
APPENDICES		Page
1	DIRECTOR AND ASSISTANT DIRECTOR SEATS	47
2	BILL OF RIGHTS OF MEMBERS OF LABOR ORGANIZATIONS	50
3	FIDUCIARY DUTIES	53
4	DISCIPLINARY PROCESS TRIALS AND APPEALS	54
5	REMOVAL OF OFFICERS	57
6	LMRDA REQUIREMENTS FOR LABOR ORGANIZATION REPORTING (LM-2)	59
7	REPORTING AND DISCLOSURE REQUIREMENTS FOR STATEWIDE OFFICERS, LOCAL OFFICERS, DIRECTORS, ASSISTANT DIRECTORS AND UNION STAFF	61

**SEIU LOCAL 503, OREGON PUBLIC EMPLOYEES UNION
BYLAWS**

ARTICLE I - NAME

The name of this organization shall be the Service Employees International Union Local 503, Oregon Public Employees Union, hereinafter referred to as the "Union".

ARTICLE II - PURPOSE

The Union is a labor organization established to represent and work for the benefit of employees on matters of employment relations, through collective bargaining and collective bargaining contract administration; through pursuit of merit system remedies and other remedies of law and rule; binding arbitration, worksite activities, political organizing and self-help activities; through active initiation or support of legislation and ballot measures beneficial to such employees; through active opposition to legislation and ballot measures detrimental to the interests of such employees; and through providing services and benefits for the common good, in a manner compatible with the public interest.

ARTICLE III - MEMBERSHIP

Section 1. The Union has five (5) types of membership: active, semi-active, associate, retired, and staff.

Section 2. Active Membership.

(a) Active membership in the Union is open to non-supervisory and non-confidential employees employed in bargaining units for which the Union is the exclusive collective bargaining representative, or units currently being organized by the Union.

(b) Active membership status shall continue during the period of time that an employee is on authorized leave or for the first ninety (90) days of layoff status.

(c) Every active member has all rights of Union membership and has equal rights and privileges within the Union. These rights include, but are not limited to, the right to nominate candidates, to vote in elections or referendums of the Union, to hold office at all levels of the Union, to attend membership meetings, and to participate in the deliberations and

voting upon the business of such meetings, subject to reasonable rules and regulations of the Union for the conduct of such meetings.

(d) Every active member of the Union has the right to meet and assemble freely with other active or retired members; to express any views, arguments, or opinions; and to express at meetings of the Union such member's views about candidates in an election of the Union or about any business properly before the meeting, subject to the Union's established and reasonable rules pertaining to the conduct of meetings. However, nothing in subsection (a) or (b) of this Section shall be construed to impair the right of the Union to adopt and enforce reasonable rules as to the responsibility of every member toward the Union as an institution and to such member's refraining from conduct that would interfere with the Union's performance of its legal or contractual obligations.

(e) A member's right to attend meetings shall not be limited to those of his/her Local, the Board or its committees, but shall apply to meetings of any Local although the member's right to vote at such meeting shall be governed by the established policies of such meeting group. The visiting member should be identified as a guest. Nothing in this provision shall limit the Board's ability to conduct its business in Executive Session in appropriate circumstances.

Section 3. Semi-Active Membership.

(a) Semi-active membership is limited to seasonal employees on layoff status in bargaining units for which the Union is the exclusive collective bargaining representative.

(b) A semi-active member may hold any office, provided that they remain members in good standing and pay dues at the associate member rate while in semi-active status. Semi-active members shall receive all general publications sent to active members.

Section 4. Associate Membership.

(a) Associate membership is open to employees excluded from active membership in the Union, staff, or members of affiliated labor organizations.

(b) An associate member of the Union may not vote; may not nominate candidates; may not hold any office in the Union; may not attend or speak at membership meetings of the Union except by invitation of the officer or officers in charge of the meeting; and may not participate in deliberations on Union business.

Section 5. Retiree Membership.

(a) Retiree membership is open to persons who, while employed, were active or associate members of the Union or its predecessor organizations or other SEIU affiliated unions.

(b) Except as provided in the Constitution, retired members belonging to the Retiree Local have all the rights of Union membership except those rights excluded herein, and that the President of the Retiree Local 001, or in his/her absence, the Vice President of the Retiree Local 001, shall have voting rights as a member of the Board. Delegates to General Council shall have the same voting rights as other General Council delegates.

(c) Notwithstanding the provisions of subsection (a) of this Section, no retired member, including any retired Past President, who immediately prior to retirement was not an active member, under Section 2 of this Article, shall have any membership rights other than the right to participate in programs made especially available for retired persons; the right to meet and assemble with other retired members for the purpose of dealing with matters or concerns relating only to retired members; and the right to express views and vote at such meetings on such matters or concerns. Exceptions to this policy may be granted to former active members of the Union who spent the majority of their employment in the bargaining unit. This action requires a unanimous vote of the Board. A retired person granted this exception by the Board has the same membership rights as other retired members who retired in active member status. This action may be revoked by a majority vote of the Board.

(d) All retired members are placed in one statewide Retiree Local.

Section 6. Staff Membership. Staff membership is open to Union staff. Staff members have the right to:

(a) Submit resolutions to General Council, vote on dues increases and other union governance issues, including economic and social policy positions, but not on issues specific to bargaining units.

(b) Serve as a representative, with full voting rights on all issues, to any labor board, conference, convention, or other function, if elected by the membership or designated to do so by the Board.

(c) Nominate candidates and vote in statewide Union elections.

(d) Run for and serve in the office of Executive Director.

Section 7. Subject to approval by the Board of Directors, eligibility for continuing membership may be extended to former active members who separate from employment in a bargaining unit currently or formerly represented by the Union and to former staff members who separate from employment with the Union.

Section 8. Membership is contingent upon payment of dues as provided in this Document. (See Article XIX)

ARTICLE IV - LOCALS

Section 1. Locals are sub-components of the Union comprised of the active and semi-active members for each state agency, each subsection of a state agency designated as a Local by the Board of Directors (as requested by the members in the affected agency) or other bargaining unit represented by the Union or other non-state agency bargaining unit. All alternate structures must be approved by the elected leaders of the affected Locals (or the bargaining team, in the case of newly formed Locals that do not yet have elected leaders) and the Board of Directors.

Section 2. A regular Local may also be formed by affiliation of an existing employee organization with this Union. Affiliation shall be pursuant to an affiliation agreement between the organization and the Union approved by the Board and signed by the President and Secretary-Treasurer of the Union.

Section 3. Each Local shall file with the Union's Secretary-Treasurer a signed and ratified copy of the Local's provisions for self-government and any subsequent amendments thereto. Any portion of a Local's provisions for self-government in conflict with the Bylaws of the Union or any resolution approved by the General Council shall be void.

Section 4. All active members of the Union shall belong to a Local. An active member may hold membership in more than one Local at a given time, if employed by more than one employer with Union bargaining unit members. In such cases, the member holds full membership rights in each of the Locals where they have membership, but may only have one vote in statewide issues. In order to be able to cast one vote for industry representation in the statewide Board election, a dual Local member shall have a primary industry seat determined by where the longest membership status exists. For purposes of this Article, "statewide" shall also include one representational vote at such events as General Council, bargaining conferences, SEIU conventions, etc.

**ARTICLE V - MEMBER BILL OF RIGHTS AND RESPONSIBILITIES
IN THE UNION AND ON THE JOB**

Section 1. Rights and responsibilities of Union members in the Union include the following:

- (a) The right to have opinions heard and respected, to be informed of union activities, to be educated in union values and union skills;**
- (b) The right to choose the leaders of the Union in a fair and democratic manner;**
- (c) The right to a full accounting of union dues and the proper stewardship over Union resources;**
- (d) The right to participate in the Union's bargaining efforts and to approve Union contracts;**
- (e) The right to have members' concerns resolved in a fair and expeditious manner;**
- (f) The right and responsibility to use their collective strength to support, propose, amend or oppose laws or ballot measures that affect employees' rights and to otherwise help build a political voice for workers in Oregon and elsewhere.**
- (g) The responsibility to help build a strong and effective labor movement, to support the organizing of unorganized workers and to stand up for one's co-workers and all other workers;**
- (h) The responsibility to be informed about the internal governance of the Union and to participate in the conduct of the Union's affairs;**
- (i) The responsibility to contribute to the support of the Union;**
- (j) The responsibility to treat all workers and members fairly;**
- (k) The responsibility to offer constructive criticism of the Union.**

Section 2. Rights and responsibilities of Union members on the job include the following:

(a) The right to have work that is worthwhile to society, personally satisfying to the worker, and which provides a decent standard of living, a healthy and safe workplace, and the maximum possible employment security;

(b) The right to have a meaningful and protected voice in the design and execution of one's work and in the long term planning by ones' employer as well as the training necessary to take part in such planning;

(c) The right to fair and equitable treatment on the job;

(d) The right to share fairly in the gains of the employer;

(e) The right to participate fully in the work of the Union on the scope, content and structure of one's job;

(f) The responsibility to participate in the Union's efforts to establish and uphold collective principles and values for effective work participation;

(g) The responsibility to recognize and respect the interests of all Union members when making decisions about Union goals;

(h) The responsibility to be informed about the industry in which one works and about the forces that will affect the condition of workers in the industry;

(i) The responsibility to participate fully in the Union's efforts to expand the voice of workers on the job;

(j) The responsibility to give fully and fairly of one's talents and efforts on the job and to recognize the legitimate goals of one's employer.

Section 3. All members of the Union shall have and may freely exercise the rights of union members set forth in law including, but not limited to, the "Union Members' Bill of Rights" of the Labor Management Reporting and Disclosure Act (LMRDA) which is set forth in Appendix 2 of this document.

ARTICLE VI - MISCONDUCT OF MEMBERS

Section 1 – Members who engage in the following or other forms of misconduct shall be subject to discipline up to and including revocation of membership and expulsion from the Union pursuant to the disciplinary procedures set forth in Appendix 4 of this document.

(a) Fail to support the Bylaws and other governing documents of the Union to the best of his or her ability;

- (b) Fail to pay dues and lawful assessments as called for in Article XIX;**
- (c) Engage in any conduct or speech which is intended to harm the Union or its operations; specifically, the following:**
- (1) Conspire with management to the detriment of the Union or with them in collusion against collective bargaining by the Union;**
 - (2) Solicit another labor organization or solicit other Union members or other employees eligible for Union membership to become a member of another labor organization;**
 - (3) Pass information or initiate petitions which:**
 - a. Call for a new labor organization;**
 - b. Seek to decertify the Union; or**
 - c. Call for members to side with management in opposition to the Union in collective bargaining or otherwise.**
- (d) Take any action, which is incompatible with the purpose of the Union;**
- (e) Take any action, which is in conflict with the expressed or implied powers conferred by the Union's governing documents;**
- (f) Publish or make public statements that declare or imply that the Union endorses, opposes or recommends a ballot measure, political candidate, legislation or any other position when the Union has not, in fact, done so;**
- (g) Solicit funds or enter into any contract or other arrangement regarding goods, property, or services in the name of the Union, or in such a manner as to imply endorsement by the Union, unless approved by the General Council or by the Board. This limitation shall not apply, however, to activities with a strictly social or administrative purpose;**
- (h) Make a false statement or representation of a material fact, knowing it to be false, or who knowingly fails to disclose a material fact, in any document, report, or other information required under the provisions of the Union's Bylaws; or who willfully makes a false entry in or willfully conceals, withholds, or destroys any books, records, reports, or statements required to be kept by any provision of the Bylaws, shall be expelled from the Union.**

Section 2. A member whose membership has been revoked may be reinstated by a three-fourths (3/4) vote of the Board after six (6) months from the date of revocation.

Section 3. Nothing in this Article is intended to, nor should it be construed to, limit the rights of any member or group of members to exercise their rights of free speech, redress of grievances, and dissent.

ARTICLE VII - RESPONSIBILITIES OF OFFICERS AND DIRECTORS

Section 1. Responsibilities of Statewide Officers, Local Officers, Directors and Assistant Directors include the following:

(a) Act to further the purposes and principles of the Union and the interests of its Members;

(b) Preserve and defend the good name of the Union;

(c) Use the privileges of any Union office, whether elected or appointed, to support, protect, and further the purposes, policies and procedures of the Union and to adhere to its governing documents;

(d) To prudently handle any Union fiscal matters, especially handling of Union funds, in conformance with accepted accounting principles, sound fiscal management and all fiduciary responsibilities imposed by law;

(e) To not engage in any conduct or speech, which is intended to harm the Union or its operations unless such speech or conduct is protected by law;

(f) Any Local Officer, Committee Chairperson, Statewide Officer, Director, Assistant Director, or Union Steward who is an acting supervisor, "temporary manager," or in a developmental management position for more than thirty (30) consecutive calendar days, shall notify the Union President and be granted a leave of absence from their Union offices for the time in management;

(g) Willful violation of any provision of the Union Bylaws shall be cause for removal from any office held and the member will be restricted from running for any steward or officer position for two years, subject to the applicable provisions of the SEIU International Constitution and Bylaws;

(h) Any officer who makes a false statement or representation of a material fact, knowing it to be false, or who knowingly fails to disclose a material fact, in any document, report, or other information required under the provisions of the Union's Bylaws, or who willfully makes a false

entry in or willfully conceals, withholds, or destroys any books, records, reports, or statements required to be kept by any provision of the Bylaws, shall be expelled from the Union.

Section 2. Statewide Officers, Local Officers, Directors and Assistant Directors may be removed from office pursuant to the procedures set forth in Appendix 5 of this document.

ARTICLE VIII - GOVERNANCE OF THE UNION

Section 1. The General Council is the supreme governing body of the Union and shall meet in regular session every even-numbered year.

Section 2. The Board is the governing body of the Union between sessions of General Council, and the administration of the affairs of the Union is vested in the Board.

Section 3. The Executive Committee of the Board is the governing body between meetings of the Board.

Section 4. In addition to this document, the Union shall maintain a governing document termed Administrative Policies and Procedures (AP&P). To the extent a provision in the AP&P conflicts with a provision in this document, the terms of this document shall prevail.

The AP&P document is amendable by both the General Council and the Board. Provisions adopted by a majority vote of the General Council shall be kept distinct from those adopted by the Board. Provisions adopted by the General Council may be amended by the Board using the General Council process.

(a) Beginning February 1, 2011, the AP&P shall be a wholly Board of Directors' document except for those provisions for which an adopted General Council resolution, or other conclusive evidence, is presented to the January 2011 Board meeting to establish that a particular provision had previously been adopted by the General Council. Any adoption/approval of a revised version of the AP&P by the 2010 General Council shall not be deemed evidence of prior General Council adaptation for purposes of this Section.

(b) All special rules of order governing Board of Director Meetings shall be placed in a separate document named by the Board.

ARTICLE IX - THE GENERAL COUNCIL

Section 1.

(a) The General Council shall meet in regular session within the State of Oregon during every even-numbered year on dates fixed by the Board of Directors.

(b) A special session of the General Council may be convened:

(1) On the call of the President, with the approval of the Board, with at least ten (10) days written notice to each General Council delegate;

(2) On written demand of two-thirds (2/3) of the Locals, addressed to the President and with at least thirty (30) days written notice to each General Council Delegate.

Any call to a special session shall specify the subjects on which action by the General Council is sought.

Section 2.

(a) The delegate roster of the General Council consists of:

(1) Delegates from the Locals, including Retiree Local;

(2) Board Members and Board Members-elect, including Statewide Officers;

(3) Assistant Directors and Assistant Directors-elect;

(4) Past Presidents.

(b) Eligibility for delegate is limited to active and semi-active members or retired members who were active members at the time they retired or had their active status reinstated by the Board in accordance with Article III, MEMBERSHIP, Section 5(c) of this document.

(c) Delegates shall serve a two (2)-year term. Alternates who become delegates at General Council will become delegates of record for the two (2)-year term.

Section 3. Representation.

(a) **Local Representation.** Each Local is entitled to a minimum of one (1) delegate. Representation in the General Council is otherwise accorded to each Local on the basis of one (1) delegate for each one hundred (100) members or majority fraction thereof. The number of delegates to which a Local is entitled shall be determined by the most recent Union monthly Membership Report prior to the deadline for notification of delegate strength or by the average annual membership of the previous twelve (12) months available, whichever is higher.

(b) **Past Presidents.** Past Presidents of the Union who are active members, staff members, or who are retired members and were active members at the time they retired or have had their active status reinstated by the Board in accordance with Article III, MEMBERSHIP, Section 5(c) of this document are permanent delegates to General Council. They have all delegates' rights and privileges.

Section 4. Accreditation. A Local delegate is accepted as a member of General Council upon presentation and acceptance at the regular session and/or special session of General Council with credentials signed by an officer of his/her Local. Statewide Officers, Directors, Assistant Directors, and the Retiree Local President are accepted as members upon presentation and acceptance of credentials signed by the Union President or Secretary-Treasurer.

Section 5. Voting.

(a) **Franchise.** Each person who is a voting member of the General Council is entitled and limited to a single vote on each issue, regardless of number of positions held.

(b) **Proxy.** There is no proxy voting at General Council.

(c) **Quorum.** A quorum at the General Council is present if two-thirds (2/3) of the delegates are present, provided one-half (1/2) of all the Locals are represented.

Section 6. Resolutions.

(a) **Resolution Process.**

(1) The object of the resolution process is to seek a plan for solving problems for which no satisfactory plan of solution exists; to express a view not previously expressed to date; or revise the Union's position on a particular economic or social concern which

directly or indirectly affects members of the Union. Plans of solution and views expressed shall be compatible with the general welfare and within the purpose of the Union. Resolution sponsorship is an indication of the endorsed need to solve a problem, not necessarily an endorsement of the proposed solution; or the endorsed need to express a view, not necessarily an endorsement of the view expressed. Sponsorship also means that no satisfactory solution or expressed view can be found by any action other than General Council's.

(2) Resolutions may be authored by any member. Resolutions should be in the form outlined by the Resolutions Review Committee. Resolutions that are proposed amendments to the Union's Bylaws must refer to the specific portions amended with words to be struck in brackets and new words to be inserted underlined. Local Officers are responsible to provide assistance.

(3) Resolutions may be presented at Local meetings to seek sponsorship. The Local may endorse or reject sponsorship. In the event that the Local does not endorse the resolution, the author of the resolution may, after having obtained the signatures of fifty (50) active members, present it to the Resolutions Review Committee. Resolutions written by a Standing Committee of the Union are sent directly to the Resolutions Review Committee within the same time limits provided in Section 6(a)(4).

(4) Resolutions must be presented to the Resolutions Review Committee at least ninety (90) days before General Council, except that the Board may submit resolutions up to one month before General Council.

(5) Untimely resolutions will not be accepted unless the subject matter is of such an emergency nature that it could not have been submitted in a timely manner. The decision as to the acceptance of late resolutions will be the responsibility of the Resolutions Review Committee. If denied, the submitting parties may appeal such a decision to the Board.

(6) No member's resolution will be denied because of a technicality and/or its format.

(b) Duties of Resolutions Review Committee.

(1) The Resolutions Review Committee shall meet and review resolutions submitted in a timely manner so that resolutions will be included with the first mailing of delegate registration packets.

(2) Resolutions accepted by the committee will be edited prior to submission for General Council. The editing process shall not change the object of any resolution.

(3) Resolutions go to the legal and political staffs for comment and to the Union Finance Committee for a cost estimate.

(4) The committee will return resolutions which are duplications of existing policy resolutions together with a reference to where this matter has previously been addressed.

(5) After the submission deadline, the President will recommend assignment of the finalized resolutions to General Council committees for committee hearing and action. Resolutions will be printed for inclusion in delegate packets.

(6) The original date of submission to the Resolutions Review Committee is the controlling date. In the event a resolution is returned to the sponsor for further review and/or action, no late resolution penalty shall apply.

Section 7. Officer Installations. On the last day of the regular session of the General Council, the newly elected Directors, Assistant Directors, and the Retiree Local President shall be installed. The President may designate the person or persons whom the Union invites to administer the oaths of office and conduct the installation.

Section 8. Expenses. Authorized expenses of members of the General Council, when attending any session of the Council, are paid by the Union.

Section 9. Voting Between Sessions.

(a) A vote on an issue may be required from the General Council between sessions by either the Board or by an initiative petition signed by 20 percent (20%) of the active membership or endorsed by 30 percent (30%) of the Locals. When a vote is required by the General Council between sessions, the Board shall formulate the question and shall set a time for distribution and return of written ballots containing the question.

Voting shall be by those persons entitled to vote as delegates if a special session were called.

(b) The Executive Director shall distribute ballots to those persons entitled to vote, together with directions for voting, and any available supporting or opposing arguments pertinent to the question. The tally of votes and announcements of results shall be made by the Secretary-Treasurer.

Section 10. General Council Committees.

(a) Regular General Council Committees. The following General Council committees are authorized: Employee Representation, Membership Affairs, Retirement, Employee Benefits, Bylaws, Union Operations, Economic and Social Policy/International Affairs.

(b) Procedural and Special General Council Committees. Other authorized General Council committees include: Credentials, Rules, and General Council Planning. There shall be other General Council committees as each Board of Directors or the General Council may from time to time determine to be necessary and authorize.

(c) Appointment of Committee Members.

(1) The President, subject to confirmation by the Board, shall appoint the members of all General Council committees and designate the chairpersons thereof. The members of these committees shall be members of the General Council, with the following exceptions:

a. Members of the Credentials Committee may be appointed from the membership-at-large, including retired members of Union.

b. Members of the Resolutions Review Committee shall be appointed from delegates who attended the previous General Council and shall be appointed at least six (6) months prior to General Council.

(2) Nominees for any statewide office (Union President, Vice President, Secretary-Treasurer, Executive Director) shall not serve as chairpersons of any General Council committees.

(d) The General Council Planning Committee shall serve as the General Council Critique Committee and shall be appointed by the President. The committee receives suggestions on improving General Council, reviews

such suggestions, and reports its findings and recommendations to the Board within ninety (90) days after the conclusion of General Council.

(e) The Credentials Committee receives proof of election and passes upon the eligibility of each delegate to the General Council.

(f) The Rules Committee meets before the convening of General Council and proposes rules to be adopted by the Council at its first session. The committee may be called upon during the Council to assist the Parliamentarian in the interpretation of rules.

(g) Committee Handling of Resolutions. The remaining General Council committees hear, consider, and make recommendations to the Council regarding resolutions referred to them by the Resolutions Review Committee, the President, or the Council.

(1) A committee may, by two-thirds (2/3) vote after open debate, elect to hold in committee any resolution assigned to it. These committees shall, after all resolutions have been debated and voted upon in committee, publish a list of resolutions assigned to it and the action taken on them. This list will clearly indicate the recommendation or "held in committee" and be distributed to all delegates.

(2) The General Council may, by simple majority, vote to call a resolution from committee for discussion by the Council delegates during the discussion of other resolutions from that committee or during new business.

Section 11. The President of any General Council or Special General Council shall appoint a parliamentarian whose sole duty shall be to keep the chairperson advised of proper parliamentary procedure and to advise the chairperson in the form of rulings on parliamentary questions raised during the General Council. The person selected to serve in this capacity shall do so to the exclusion of any other General Council or Special Council office or job.

ARTICLE X – CONVENTIONS

Section 1. Effective September 2008, delegates to the SEIU Convention shall be determined as follows:

(a) Statewide Officers and members of the Board of Directors shall serve as automatic delegates to the SEIU Convention, as long as they meet all criteria set out by SEIU (which may include having been elected in an LMRDA governed election and having been a member in

good standing for at least two years). For the President of the Retiree Local, this may include the Local meeting a threshold number of retiree members. If there are more people entitled to delegate status than the number of delegate slots to which the Union is entitled, then the Statewide Officers will be automatic delegates, and names of eligible Directors will be randomly chosen until all delegate slots are filled. If there are fewer people entitled to delegate status than the number of delegate slots to which the Union is entitled, then Assistant Directors who meet SEIU criteria will be randomly chosen until all delegate slots are filled.

ARTICLE XI - BOARD OF DIRECTORS

Section 1. The Board of Directors of the Union (the Board) is comprised of Directors holding the seats set forth in Appendix 1 to this document, the Statewide Officers and the President of Retiree Local 001, and in his/her absence, the Vice President of the Retiree Local 001.

(a) The Directors/Assistant Directors elections shall be concluded by May 1 of even-numbered years.

(b) The term of office for the Board, excluding Statewide Officers, shall begin with installation during a regular session of the General Council, and shall end with the installation ceremony held for a new Board during the next regular session of the General Council.

(c) A member can serve as a Director for only two (2) terms in any six (6)-year period.

(d) Directors and Assistant Directors, other than Directors or Assistant Directors from the Retiree Local, shall be active members of the Union.

Section 2. Powers of the Board.

(a) The Board shall have such powers and duties as are set forth in this and other governing documents of the Union; shall carry out any and all recommendations and instructions from the General Council; and exercise general authority consistent therewith to formulate the program and administer the affairs of the Union between sessions of the General Council.

(b) The Board may adopt such rules and delegate such power as it deems appropriate, consistent with the Union's governing documents.

Section 3. Regular Meetings of the Board.

(a) The Board shall hold at least six (6) general meetings each calendar year. The dates for these meetings shall be published in the union newsletter in the first issue published after the beginning of the calendar year.

(b) Other regular meetings of the Board shall be held at the call of the President, upon at least ten (10) days written notice to each Board member or by call of two-thirds (2/3) of the members of the Board, with fifteen (15) days written notice to each member.

Section 4. Special Meetings of the Board may be called by a majority of the Board, upon five (5) days' written notice, and are limited to a consideration of the matters specified in the call.

Section 5. Quorum of the Board. A majority of the members of the Board shall constitute a quorum.

Section 6. The Board shall determine salaries, fringe benefits, and conditions of employment for the Executive Director through negotiations between the Executive Director and the Board.

Section 7. Terms and conditions of employment for represented employees of the Union shall be subject to collective bargaining, in which the Union shall be represented by a committee consisting of management staff members appointed by the Executive Director and active Union members appointed by the President and approved by the Board.

Section 8. The Board shall follow procedures to protect the rights of dissenting Local members and assure operation of democratic processes.

Section 9. Directors shall perform the following functions and duties as well as other functions and duties as appropriately assigned.

(a) Assist members;

(b) Encourage ethical conduct among members;

(c) Keep the Assistant Director informed of Board matters;

(d) Represent the members at meetings of the Board and serve on committees of the Board.

(e) Upon accepting any assignment to work on the staff of the Union for a period expected to last thirty (30) days or more in duration, a Director shall temporarily step down from the duties of Director and

the Assistant Director shall take over his/her duties until the period of employment on Union staff is ended.

(f) Actively participate in campaigns approved and endorsed by the Board whenever possible. This includes, but is not limited to, phone banking, canvassing, signature gathering, moving petitions, or participation in worksite campaigns.

(g) Serve as a delegate to the SEIU Convention, consistent with the provisions of the governing documents of the Union and the International Union.

Section 10. Assistant Directors shall perform the following functions and duties as well as other functions and duties as appropriately assigned.

(a) Serve in the absence of the Director;

(b) Assist the Director in carrying out his/her duties;

(c) Upon appointment by the Board, succeed to the office of Director;

(d) Serve on committees of the Board;

(e) Serve as a delegate to the SEIU Convention, consistent with the provisions of the governing documents of the Union and the International Union.

Section 11. Before a Director-elect or an Assistant Director-elect may assume office, the Credentials Committee, if the General Council is in session, or the Board if it is not, shall be furnished with a copy of the certified election tally sheets signed by the Secretary-Treasurer of the Union.

Section 12. There shall be a mandatory orientation session for the members of each new Board held in a timely manner following installation of the new Board.

Section 13. If a Director resigns, is removed from office, or ceases to work in the region from which he or she was elected (or in the employer group from which he or she was elected in the case of Directors representing employer groups), the Board shall appoint the Assistant Director to serve the remaining portion of the Director's term. If there is a vacant Director position and there is no Assistant Director from that region or employer group, an election will be held within sixty (60) days to elect a Director to serve the remaining portion of the term. Elections will not be held to fill vacancies unless both the Director and Assistant Director positions are vacant.

ARTICLE XII - EXECUTIVE COMMITTEE

Section 1. The Executive Committee consists of the President, who shall chair the committee; the Immediate Past President; the Vice President; the Secretary-Treasurer; the Executive Director; and three (3) Directors elected by the Board to serve terms not to exceed twelve (12) months.

Section 2. Election of the Executive Committee shall be done at the first meeting of the Board following every regularly scheduled General Council, and every twelve (12) months thereafter.

Section 3. The Executive Committee shall conduct hearings and decide appeals from Locals concerning the imposition of a trusteeship. (See Article XXIV Section 6 of this document.)

ARTICLE XIII - STATEWIDE OFFICERS

Section 1. The Statewide Officers of the Union are: President, Immediate Past President, Vice President, Secretary-Treasurer, and Executive Director.

Section 2. The Statewide Officers, except the Immediate Past President, are elected by the membership statewide. The President becomes the Immediate Past President upon installation of a successor. There is no alternate or replacement for an Immediate Past President.

Section 3. A member can serve as the President for only two (2) consecutive two (2)-year terms or a major portion thereof in any five (5)-year period.

Section 4. A member can serve as the Vice President, or the Secretary-Treasurer or a Director for only two (2) terms in any six (6)-year period.

Section 5. Statewide Officers shall be active members of the Union except that the Executive Director and the Immediate Past President may maintain Staff Membership status or other Union membership status except associate membership.

Section 6. In the event a Statewide Officer, other than the Executive Director, is removed from office, the Board may appoint a Board member or Assistant Director to serve the remaining portion of the term. In the case of a vacancy in the position of Executive Director, the Board may fill the position as it sees fit.

Section 7. The President shall be paid a salary (through his or her respective employer if possible) during his/her term of office. That salary shall be the salary he/she earns in the bargaining unit position held at the beginning of the term, including any increases due during the term. But no less than step 6 of the organizer salary chart. The Union shall also compensate the President at the rate

of four hundred dollars (\$400.00) per month. The President shall receive no salary or other payments than those provided by the Union or by his/her bargaining unit employer.

Section 8. The President shall serve on a full-time basis during the term(s) of office as a Fair Labor Standards Act exempt individual.

Section 9. The Union shall compensate the Vice President and the Secretary-Treasurer at the rate of \$130 per month while in his/her respective positions.

Section 10. The Union will hold harmless and make whole any past president or future president from financial loss, as determined at the time they complete their term of office, in their retirement plan due to lost time for service as president.

ARTICLE XIV - DUTIES OF STATEWIDE OFFICERS

Section 1. The President shall perform the following functions and duties as well as other functions and duties as appropriately assigned.

- (a) Preside at all meetings of the General Council, Board, and Executive Committee;**
- (b) Set the agenda for Board meetings and act as the Board administrator**
- (c) Act as the chief spokesperson for the Union;**
- (d) Appoint the chairs and members of Committees or Special Councils pursuant to the procedures set out in Article XVII Section 1 of this document;**
- (e) Appoint and, for cause, dissolve all Special committees, subject to approval by the Board;**
- (f) Serve as a non-voting ex-officio member of all Standing Committees;**
- (g) Deliver to the General Council a report on his/her administration with such recommendations as deemed advisable;**
- (h) Cease, upon election, to hold office in any Local;**
- (i) Attend and represent the Union at national or regional meetings, including coalitions in which the Union is participating. If the Vice President is unavailable, the President may delegate a representative to fulfill this responsibility.**

(j) Serve as a Union delegate to the SEIU International Convention. This responsibility may not be delegated.

(k) Represent the Union on the SEIU Oregon State Council;

(l) Assist in development and oversight of the Union's internal and external communications program, in conjunction with the Executive Director and Communications Department staff;

(m) Consider and decide on appeals from Arbitration Screening Panels;

(n) Coordinate the activities of the Directors and Assistant Directors to implement strategic goals adopted by the Board of Directors, the Union and the International Union;

(o) Represent the Union at the Legislature and in ballot measure campaigns in conjunction with the Executive Director and the Political Department staff;

(p) As detailed elsewhere in this document, the President shall also: sign affiliation agreements (Art. III § 2(b)); receive certain notices (Art. VII § 1(f); sign General Council delegate credentials (Art. IX § 4); perform various functions and make certain appointments (with Board approval where appropriate) at General Council (Art. IX §§ 6(b)(5) and (6), 10(c), (d) (g) and 11); make other appointments (Art. XI §§ 5, 6(d)); and perform functions set out in Disciplinary Process Trial and Appeals (Appendix 4 § 1).

Section 2. The Immediate Past President shall perform the following functions and duties as well as other functions and duties as appropriately assigned.

(a) Advise the President;

(b) Serve as a nonvoting member of the Board and the Executive Committee;

(c) Serve on committees as appointed by the President;

(d) Provide orientation for General Council delegates;

(e) Serve as an advisor and nonvoting delegate to the SEIU International Convention.

Section 3. The Vice President shall perform the following functions and duties as well as other functions and duties as appropriately assigned.

- (a) In the absence of or upon request of the President, perform the duties of the President;**
- (b) Replace the President for the unexpired term in the event of the death, incapacity, resignation, or removal of the President;**
- (c) Serve as the chairperson of the Rules Committee, a member of the Executive Committee and a member of the Union Finance Committee and on such other committees to which he/she is appropriately assigned or appointed.**
- (d) Serve as a delegate to the SEIU International Convention.**

Section 4. The Secretary-Treasurer shall perform the following functions and duties as well as other functions and duties as appropriately assigned.

- (a) The Secretary-Treasurer, working with staff as designated by the Executive Director, shall:**
 - (1) Keep a correct record of the meetings of the General Council, the Board and Executive Committee;**
 - (2) Be custodian of the records of the Union including election records;**
 - (3) Serve as the chairperson of the Union Finance Committee and a member of the Executive Committee;**
 - (4) Be responsible for oversight of the Union's finances and investments;**
 - (5) Collect the money; keep the accounts and books of the Union; and render a statement, after a certified audit of the accounts and books of the financial condition of the Union, to the General Council and at such other times as requested by the Board;**
 - (6) Coordinate and keep current a list of policies and procedures of the Union.**

(b) The Secretary-Treasurer shall:

- (1) Be responsible to the Board for annual review of the fiscal operation of the Union and Locals;**
- (2) Serve on such committees as designated by these Bylaws and to which he/she is appointed by the President;**
- (3) Serve as a delegate to the SEIU Convention.**

(c) As detailed elsewhere in this document, the Secretary-Treasurer shall: sign affiliation agreements (Art. III § 2(b)); sign General Council delegate credentials (Art. IX § 4); sign certified election tallies (Art. XI § 11); certify or make public various election results (Art. XV §§ 4(h), 5(c)(9), 6(h), 6(i) and 9); approve the holding of Local financial records (Art. XXII § 4(b)); authorize certain payments to Locals (Art. XXII § 12); notify Locals of failure to file governing documents (Art. XXIII § 2); perform functions pursuant to trusteeships of Local (Art. XXIV §§ 2, 5 and 6); and perform functions set out in Disciplinary Process Trial and Appeals (Appendix 4 §§ 1 – 4).

Section 5. The Executive Director, or through his/her delegate, shall perform the following functions and duties as well as other functions and duties as appropriately assigned:

- (a) Serve as the chief executive officer of the Union and have general supervision of and direction over the daily activities of the Local, including employment and supervision of staff, and expenditure of Union funds, subject to the financial ability of the Union to pay and consistent with the priorities and policies of the Union as determined by the Board and the Bylaws;**
- (b) In conjunction with the Secretary-Treasurer and appropriate staff, maintain records of the meetings, bank accounts and financial transactions, purchase insurance and bonds, collect moneys and maintain the books of the Union, maintain and coordinate current policies and procedures of the Union, and prepare an annual budget for the Union.**
- (c) Serve as a member of the Union's negotiating teams along with member representatives and staff assigned to sit at the bargaining table; oversee other daily activities of the Union such as organizing, contract administration, political activity, and training. The Executive Director may appoint representatives to discharge any of these responsibilities.**

(d) Provide regular reports to the Board on the various programs and projects carried out by the Union. Such reports will allow for time for discussion and evaluation.

(e) Maintain an internal and external communications program throughout the Local; represent the Union within the community and with the media, in conjunction with the President who serves as the chief spokesperson for the Union;

(f) Attend and represent the Union at all appropriate national, regional, or Local meetings of a variety of organizations, including coalitions for which the Union is participating. The Executive Director may appoint a representative to discharge this responsibility.

(g) Serve as a Union delegate to the SEIU Convention. This responsibility may not be appointed to another Union representative. However, a duly elected alternate delegate may serve, as appropriate, in the Executive Director's absence.

(h) Cease, on election, to hold any office which until then he/she may have held in his/her Local. The Executive Director may not hold any other employment while holding this office nor receive a salary from any source other than the Union.

Section 6. Statewide Officer Vacancies.

(a) Consistent with the provisions of Article XIII, Section 6, if a Statewide Officer, other than the Executive Director, is removed from office or if it is otherwise necessary to fill an office vacancy or newly created office at this level, the Board may appoint from the Board and Assistant Directors a person to serve the remaining portion of the term. In the case of a vacancy in the position of the President, the Vice President will become the President. In the case of a vacancy in the position of Executive Director, the Board can fill the position from staff, active membership, from outside the Union or as it otherwise sees fit.

(b) Vacancy in any Local office shall be filled for the remaining portion of the term in such office in accordance with the provisions of the Local's constitution and bylaws.

ARTICLE XV - ELECTIONS

Section 1. Elections shall be conducted for Directors/Assistant Directors, Statewide Officers, Local Officers, Bargaining and General Council Delegates and Alternates where applicable.

Section 2. The provisions of this Section shall apply to all elections conducted under this article.

(a) All elections herein shall be conducted by secret ballot. It is the responsibility of the Union to secure the integrity and accuracy of the secret ballot.

(b) Eligibility of members to nominate candidates and/or vote in any election is determined by the member's status set forth in Article III MEMBERSHIP of this document.

(c) All eligible voters in good standing may nominate candidates (including themselves), be a candidate, and hold office subject to any restrictions contained in this document.

(d) A notice that nominations are open shall be distributed to all eligible voting members. The notice shall provide adequate time and opportunity for names to be placed in nomination and shall include the office(s) to be filled, the date(s), time(s), and place(s) nominations will be accepted, a description of the duties of the office(s) and a proper form and instructions for submitting nominations, or a reference to a website where the last two items may be found. Members may receive hard copies of the referenced web materials upon their request.

Section 3. Campaign rules, candidate rights, and limitations applicable in all elections under this Article.

(a) No Union funds derived from dues, assessments, or other levies may be used to promote any person's candidacy. No employer may make contributions of cash or anything of value, either directly or indirectly, to promote any person's candidacy. And, no employee of the Union shall give or lend any money, goods, or services to aid the candidacy of any person seeking election. Members shall not be given free use of Union resources (e.g. copy machines, video equipment) to promote any member's candidacy for Union office, except that any duly nominated candidate may, on an equal basis, have free access to computer equipment in Union offices to comply with electronic filing requirements established by the Union. When approved by the Board, use of Union resources may be allowed on an equal basis with reimbursement for the actual costs involved.

(b) Except as otherwise provided in these Bylaws, every member shall have the right to vote or otherwise support the candidates of such member's choice without being subject to any penalty, discipline,

improper interference or reprisal of any kind by the Union or any member, employee, agent or representative.

(c) Staff who are members of the Union will be deemed to be in compliance with (a) and (b) above if their activities regarding campaigns do not occur during regular working hours or during any other hours in which staff are assigned to, or working on union business of any kind.

(d) The Union shall comply with all reasonable requests by candidates to distribute campaign literature to eligible voters at the candidate's personal expense. All candidates will receive equal privileges and opportunities to avail themselves of this service.

(e) Every candidate shall have the right, once within thirty (30) days prior to the election, to inspect a list containing the names and addresses of all Union members eligible to vote in that election.

(f) Candidates may be allowed to publicize their candidacy in Union newspapers or at membership meetings, provided equal access and opportunity are afforded all candidates and they are so notified in advance.

(g) Union funds may be used for notices of elections, factual statements related to the elections, and for other expenses necessary for holding an election but not for promoting one candidate over another.

(h) Candidates may, but are not required to, have observers at each polling place and at any tallying or any collection of the ballots. If a mail ballot is used, candidates shall be permitted to have an observer present while ballots are prepared and mailed and when ballots are received, opened, and counted.

(i) The Union shall, through written Board policies, take adequate safeguards to insure fair elections at all levels of the Union.

Section 4. Challenges to Elections

(a) A challenge of any election conducted under this Article must be signed by the challenger(s) and filed within fifteen (15) calendar days after the election results have been published. Challenges may be filed only by persons eligible to vote in the election.

(b) The challenge shall be presented in writing to the Chair of the Member Representation Committee who shall forward a copy to the President. Upon receipt of the challenge(s) the President shall take steps to place

review of the challenge(s) on the agenda of the next regular Board Meeting that would be able to consider the challenges.

(c) The Chair of the Member Representation Committee shall set a date at the earliest practical time for a meeting of the Member Representation Committee to hear and consider evidence in support of and in opposition to the challenge(s). Notice of the time and place of that meeting shall be given to the challenger(s) and the individual(s) whose election is being challenged.

(d) Challengers and those whose election is being challenged may present written or oral evidence at the meeting.

(e) Challengers will be permitted to submit evidence only on the specific challenges that were timely filed. Any other evidence will not be received or considered and cannot provide a basis for overturning an election.

(f) The Member Representation Committee may schedule additional hearings with notice of time and place provided to challengers and opponents of the challenge.

(g) The burden of showing cause for setting aside the election is on the challenging parties.

(h) Following its deliberations, the Member Representation Committee shall transmit a written recommendation to the Board concerning disposition of the challenge(s). Copies of that recommendation shall be provided to the challengers and the individuals whose elections were challenged.

(i) Upon consideration of the challenges and recommendations of the Member Representation Committee, the Board shall issue a written statement of its findings, which may include adoption of Member Representation Committee recommendations and direct the Union Secretary-Treasurer to certify the election or order a new election. The Board shall render its decision no later than three (3) months following the original election.

(j) Challenged elections shall be considered valid until declared otherwise by the Board.

(k) Challenging and challenged parties may be permitted to speak in favor or against the challenges prior to the Board beginning its deliberations. Neither shall be present while the Board engages in deliberations on the challenges.

Section 5. Special Rules for Statewide Officer Elections

(a) The President shall appoint members to a Statewide Officer Election Committee, subject to ratification by the Board of Directors. The Statewide Officer Elections Committee shall designate the open period for nominations for Union President, Vice President, Secretary-Treasurer and Executive Director. Elections will be held following the biennial session of General Council. Nomination forms will be made available to all eligible members statewide at least fifteen (15) days prior to the opening of nominations. Statewide Officer nominations shall be opened in conjunction with those of Directors and Assistant Directors with notification being provided at the same time, but will be closed at 5:00 p.m. the second evening of the General Council in regular session.

(b) A notice of election shall be mailed to each member at his/her last known address at least fifteen (15) days prior to election. The notice shall include the date(s), time(s), and place(s) of the election, and the manner in which the ballots will be cast. There will be no proxy voting.

(c) The Elections Committee shall hear complaints regarding election procedure or rule interpretations except as otherwise provided in Article XV Section 4 of this document.

(d) In addition to the safeguards and procedures specified in Section 3 above, the following rules shall apply to the conduct of Statewide Officer elections:

(1) All duly nominated candidates shall be invited to submit campaign statements, including a personal photograph, as submitted on the nomination form, not to exceed 400 words in length, for a Voters' Guide, which shall be published by the Union in a format and at a time approved by the Elections Committee.

(2) Additional copies of this Voters' Guide shall also be made available free of charge to Locals for distribution to their memberships and, at actual cost, to duly nominated candidates, for distribution at General Council or otherwise.

(3) All duly nominated candidates shall, at their request, at any time thirty (30) days' prior to the mailing of ballots through the deadline for receipt of ballots, be provided, at actual cost, with sets of membership mailing labels, e.g., sorted for statewide, regional, and/or Local memberships. Provision of these labels shall be conditioned on a candidate's statement not to reproduce such

labels, release them to an outside party, or use them for any other purpose.

(4) All duly nominated candidates shall be given equal opportunity to post campaign materials on all designated Union bulletin boards in SEIU 503-represented worksites.

(5) All duly nominated candidates shall be given equal access to all Union meetings and conferences, provided that the opportunity to make campaign presentations shall be consistent with the agenda and protocols for such meetings and conferences.

(6) Members shall not be given free use of Union resources (e.g. copy machines, video equipment) to promote any member's candidacy for Union office. When approved by the Board, use of Union resources may be allowed on an equal basis with reimbursement for the actual costs involved.

(7) Each nominated candidate for statewide office of the Union may submit a candidate statement to be mailed with the ballots to members of the Union eligible to vote in this election. This statement shall be, limited to one (1) uniformly formatted statement of four hundred (400) words or less and a photo (if supplied). "Uniformly formatted" includes hard copy typed or handwritten, any word processing format on disk, e-mail, faxes and any other electronic copy. Photos cannot be faxed.

(8) All duly nominated candidates shall be required to file electronic reports detailing all campaign contributions totaling twenty-five dollars (\$25.00) or more from a single contributor, and all expenditures totaling twenty-five dollars (\$25.00) or more to a single source, during an election period. Such reports shall be filed with the Union's Accounting Department no later than one week prior to the mailing of ballots (for contributions received and expenditures up to two (2) weeks prior to the mailing of ballots) and no later than two (2) weeks after the deadline for receipt of ballots (for all contributions received and expenditures through this deadline). Such reports shall be made available for inspection by any Union member at Union Headquarters and at all branch offices of the Union.

(9) Ballots shall be collected and counted by an outside firm retained by the Union for this purpose. Election results shall be certified by the Union Secretary-Treasurer, or designee, who will

secure all ballots, envelopes, tally sheets, and other election materials in accordance with Article XV Section 9.

(10) Ballots for election of Statewide Officers shall be mailed within four (4) weeks of the close of General Council.

(11) All candidates running for statewide office, even if running unopposed, shall be presented to the statewide membership in the form of a single ballot. In addition, ballots must have a space for a write-in candidate for each office.

(12) If there are more than two (2) nominees for an office, the candidate receiving a plurality of the votes shall be deemed the winner.

(13) Ballots, envelopes, election results, and tally forms shall be available for inspection by any active, staff, or retired Union member at the Union Headquarters office for a period of one (1) year following the election.

(14) Statewide Officers will be installed at an appropriate ceremony on the Friday immediately preceding the first, regularly scheduled, full meeting of the Board following completion of the vote tally.

Section 6. Special Rules for Election of Directors and Assistant Directors.

(a) A notice of election shall be mailed to each member at his/her last known address at least fifteen (15) days prior to election. The notice shall include the date(s), time(s), and place(s) of the election, and the manner in which the ballots will be cast. There will be no proxy voting.

(b) Directors and Assistant Directors are elected to seats as set forth in Appendix 1 of this document, provided that a member may run only run for one Director seat. The Board may assign newly organized workers, or workers affected by changes in zip code definitions, to representative groups as needed and such assignments will remain in effect unless overturned pursuant to a resolution submitted to the General Council in the session immediately following the Board's assignment.

(c) The second highest vote getter in each election for Director shall be elected Assistant Director. Where members elect two Directors, the third and fourth highest vote getters shall be elected Assistant Directors.

(d) Each member may cast one vote for a Director in his/her employer group (See Items 1-11 in Appendix 1). Where a member has more than one employer group, a primary employer group shall be determined by where the longest membership status exists. Each member may also cast one vote for a Director from his/her geographic area (see Items 12-22 in Appendix 1). Homecare, Adult Foster Care and Childcare members shall be represented and vote in the geographic area in which they live. Out-of-state Homecare, Adult Foster Care and Childcare workers will be represented in the geographic area closest to their home. All other members shall be represented and vote in the geographic area in which they work except that any member may opt, on an individual basis, to have their voting rights for Director determined by where they live rather than where they work.

(e) The Union President shall appoint members to the Board of Directors Elections Committee, subject to ratification by the Board of Directors. The Elections Committee shall designate the open period for nominations for Director and Assistant Director and shall make nomination forms available to all eligible voters. A Headquarters staff person shall be designated to receive and date-stamp hand-carried nomination forms received at Union Headquarters by the appointed deadline.

(f) The Elections Committee or its designee shall oversee opening and tallying of ballots, shall hear complaints regarding election procedure or rule interpretations except as otherwise provided in Bylaws Article XV Section 9.

(g) Candidate statements for Director and Assistant Director positions will be published in a newsletter and/or posted on the web. Ten (10) days after publication, the ballots will be prepared and mailed by Headquarters to the last known address of all eligible voters. The timelines for publishing statements and decision about publication will be set by the Elections Committee.

(h) Ballots shall be coded to clearly show in what election the ballot was cast. All ballots will be returned by mail to a special elections post office box. All ballots must be received by the deadline specified in the election notice.

(i) Ballots shall be opened, counted, and tallied at Union Headquarters or other qualified election service. Election results shall be certified by the Elections Committee Chair and the Union Secretary-Treasurer, their designee, or by the approved election service. Ballots, envelopes, tally sheets, and other election materials will be secured in accordance with Article XV Section 9.

(j) Election results shall be made public by the Union Secretary-Treasurer, or designee, within five (5) days after the ballots are counted. Candidates shall be mailed a copy of the tally sheets for all candidates from their election and information about the challenge process including timelines within this same five (5)-day period.

(k) Members notified of an election but not receiving a ballot or otherwise needing a replacement ballot shall request a replacement ballot by phone, in person, or in writing. The replacement ballot shall be so marked on the outside return envelope and duly noted by the ballot counting committee before opening.

(l) Ballots, envelopes, election results, and tally forms shall be available for inspection by any active, staff, or retired Union member at the Union Headquarters office for a period of one (1) year following the election.

Section 7. Special Rules for Elections in Locals

(a) Local officer elections for all Locals within The Union will be held between January and April of even numbered years, with those elected taking office no later than May 1st of that year. The seated Retiree Local President shall complete the full two-year term of office on the Board, and the Retiree Local President-elect shall be installed with the full Board in August at General Council. Officer terms of office shall be two (2) years.

(b) Elections for Local Officers shall be conducted in accordance with procedures provided in the Local's governing documents so long as they are not inconsistent with law or these Bylaws.

(c) Each member of a Local shall be provided an opportunity to vote for election of Local Officers, and delegates and alternate delegates to General Council. If an elected alternate delegate is unable to serve, the candidate with the highest number of votes shall be the replacement delegate to General Council.

(d) The President of each Local shall appoint an elections committee of three (3) active members in the Local, who are not nominees, to prepare, distribute, receive, and count the ballots at a duly publicized meeting (minimum fifteen (15)-day meeting notice required) or by mail-in ballot; to certify the election results; and to perform any other task required for conducting Local elections. The Local elections committee shall announce the election results to the seated officers, successful candidates and other announced candidates within five (5) days after the ballots have been counted.

(e) All duly nominated candidates in a statewide Local shall be invited to submit campaign statements, as submitted on the nomination form or electronically, for publication with the ballots. The statements may not exceed 200 words in length or have a photograph, and must be submitted by the same deadline as the nomination form. The additional cost of this publication shall be paid by the General Fund.

Section 8. Election of Delegate Alternates. In all delegate elections, the formula of a minimum of one (1) alternate for each two (2) delegates shall be followed. If an elected delegate or alternate cannot serve/attend the function to which they were elected, then the candidate with the next highest number of votes shall become the delegate. If there are no other candidates/alternates who ran in the same election, then the members shall be notified of a special election to fill the position. In such instances where a special election is necessary, the election could be called with a fifteen (15)-day notice to the members via worksite notices and the election would be an onsite-type election (ballot box/absentee ballots).

Section 9 Except for ballots in Statewide Officer elections, all ballots shall be counted by an Elections Committee appointed by the presiding officer of the electing body and the results certified by the members of the Elections Committee of the electing body. In statewide Union elections, results are certified by the Elections Committee and the Secretary-Treasurer of the Union. The certified election results along with the securely packaged ballots shall be forwarded to the Secretary-Treasurer of the Union, or designee, within fifteen (15) days following the election. The Union Secretary-Treasurer, or designee, shall insure timely publication of the election results. All ballots, envelopes, tally sheets, and related election materials shall be secured and kept for one (1) year.

ARTICLE XVI - UNION STEWARDS

Section 1. The Union shall recognize members to act as Union Stewards. The Union Steward's principal duty shall be to safeguard the Union's ability to represent employees.

Section 2. Each Local's provisions for self-government shall include a procedure for selection and removal of Union Stewards. The Local shall notify the Union of the members selected to act as Union Stewards and of any changes in those acting as Stewards.

Section 3. The duties of Union Stewards shall include but not be limited to the handling of employee grievances through the appropriate contractual procedures, serving as a main communication channel between members and management, Local leadership and staff.

Section 4. Stewards are strongly encouraged to complete Leadership Training and other training opportunities provided by the Union for Union Stewards.

ARTICLE XVII - COMMITTEES

Section 1. The President shall appoint the chairs and members of Standing Committees of the Union, Standing Committees of the Board, Special Committees, and Special Councils subject to ratification by the Board, except as otherwise specified in this document. Appointments will be made only after the Union announces available committee and/or council positions in the union newsletter and after the presidents of the Locals have been asked to submit names for available positions. Both the President and the Board will maintain committee and council membership that respect the Union's geographic diversity and the diversity of employer groups within our membership.

Section 2. Standing Committees of the Board, Special Councils and Special Committees have been and may be created from time to time by the General Council or the Board. The composition and functions of those Committees and Councils are set forth in the Union's Administrative Policies and Procedures (AP&Ps).

Section 3. The Standing Committees of the Union are Rules, Member Representation, Union Finance, Stewards and Information Technology.

Section 4. The functions of the Rules Committee, which shall be chaired by the Union Vice-President, are to:

(a) Promote consistency in the Union's governing documents and make periodic recommendations to the Board to achieve that objective.

(b) Work with Locals to achieve consistency between a Local's governing documents and the governing documents of the Union. To the extent the Rules Committee determines that a Local's governing documents are not in compliance with the Union's governing documents and the Local Union refuses to modify its governing documents to achieve such consistency, the determination of non-compliance by the Rules Committee may be appealed to the Board.

Section 5. The Member Representation Committee shall make recommendations to the Board in the following areas:

(a) Election challenges;

(b) Removal of officers pursuant to Appendix 5 of this document;

(c) Allegations of a breach of the Union's duty of fair representation;

(d) Assist in the resolution of internal Union disputes;

(e) Contract ratification procedures.

Section 6. The Union Finance Committee shall consist of the Secretary-Treasurer, as chair, the Vice President, and members as designated pursuant to Section 1 of this Article. The Finance Committee shall:

(a) Develop plans for adequately financing the Union and shall, in even-numbered years, present to the Board at their meeting preceding the General Council Board of Directors' meeting, a budget of estimated receipts, expenditures, and budget balances for the ensuing fiscal year. In odd-numbered years, the same information shall be presented to the Board for approval, at their last Board meeting in the fiscal year.

(b) Regularly review the fiscal operation of the Union as measured against the budget, report its findings, and make recommendations to the Board.

(c) Review all proposals to be made to the Board that will result in an expense to the Union. The purpose of the review is to:

(1) Accurately determine the cost of the proposal;

(2) Determine the ability of the Union to meet the cost;

(3) Judge the overall cost benefit to the Union;

(4) Report to the Board their findings and recommendations.

(d) Perform such other functions regarding fiscal matters as may be directed or authorized by the Board or General Council.

Section 7. Stewards' Committee shall coordinate steward activities statewide and perform the following:

(a) Plan and implement a biennial Stewards' Conference;

(b) Supervise publication of the quarterly newsletter;

(c) Monitor implementation and revisions of regular Basic and Advanced Steward Training. Encourage stewards to participate in training. Committee members are encouraged to teach Stewards' Training;

(d) Periodically survey all stewards and contacts to determine accuracy of steward lists, training needs, and ideas for recognition and retention of stewards;

(e) Assist Union Organizers in maintaining steward lists;

(f) Assist Locals in development of constitution and bylaws language regarding steward selection and replacement;

(g) Assist Locals in developing steward councils or other networks of stewards;

(h) Coordinate with Locals and the Union to provide appropriate recognition to stewards for their efforts and dedication.

Section 8. The Information Technology Committee shall perform the following functions and other functions as appropriately assigned.

(a) Explore the use of technology to enhance the capabilities and efficiencies of those working on behalf of the Union, its Locals and members;

(b) Explore the use of technology to enhance and facilitate communications between members and their elected leadership; and

(c) Make recommendations to the Board on the use of technology.

Section 9. Each Committee shall keep minutes of transactions at each meeting, and these minutes shall be included in the Board packets.

Section 10. The chairperson or a designated representative from Standing or Special Committees may present motions to the Board.

ARTICLE XVIII - COMMUNITY ACTION CENTERS

Section 1. The Board shall maintain Community Action Centers throughout the State for the purpose of holding community-based, cross-Local meetings to undertake political action, solidarity activities, strategic brainstorming and planning, and to share issues and concerns from Locals in the area.

Section 2. The expenses of these Community Action Centers shall be paid out of a line item in the General Fund budget approved each year.

ARTICLE XIX - DUES

Section 1. Union dues shall be as follows:

(a) Dues for active and staff members are 1.7 percent (1.7%) or \$5.00 (five dollars), whichever is greater, of the member's gross monthly salary for time in regular pay status.

(b) Dues for associate members are \$10.00 (ten dollars) per month.

(c) Semi-active members may continue in good standing by continuing to pay associate dues while on semi-active status. The semi-active member may make payment to the Union up to 90 (ninety) days after the end of their season.

(d) Dues for retiree members shall be no more than \$4.17 (four dollars and seventeen cents) per month payable semi-annually in January and July each year. Retiree members may make alternate payment arrangements. Persons joining during one of the semi-annual periods may pay prorated dues to the end of the period including the month in which they join. Each person eligible for retiree membership shall be sent a notice that his/her membership will be converted to a temporary retiree membership and carried at no cost to the member for 90 days. Included in this notice will be information on the benefits of continuing as a retired member of the Union, and an application form for continuing membership beyond the 90 days. A person becomes a permanent member upon formal application and payment of dues.

(e) Dues payments will not be required for retired members who have reached age seventy-five (75) and have been dues paying members (active or retired) for the previous ten (10) years.

Section 2. Allocations from dues for active and staff members shall be as follows.

(a) \$.30 (thirty cents) from each monthly dues payment shall be allocated to the Union's Strike Benefit Fund and \$.20 (twenty cents) goes to the Strike and Job Protection Fund.

(b) \$.75 (seventy-five cents) from each monthly dues payment shall be allocated to the Union's political action program. If a member desires that this contribution not be expended for political action purposes and so indicates in writing, the contribution shall be paid to the Union's scholarship fund.

Section 3. For retiree members, \$1.00 (one dollar) will go to the Union's General Fund, \$2.67 (two dollars and sixty seven cents) will go to the Retiree Local account and \$0.50 (fifty cents) will go to reimburse the cost of the retiree life insurance policy. Members may make additional contributions to Citizen Action for Political Education (CAPE).

Section 4. Changes in dues.

(a) The amounts and structures dues set out in Section 1(a) above, shall not be changed except by a vote of the active and staff membership. A simple majority of the votes cast by the membership shall determine the outcome. Any vote by the membership on change or restructuring of dues shall be conducted separately from votes on other matters.

(b) Dues amounts for retiree members shall be set by the Retiree Members Council subject to approval by the General Council.

ARTICLE XX - FIDUCIARY RESPONSIBILITIES AND BONDING

Section 1. The fiduciary responsibility of officeholders, employees, agents, Union Stewards, and other Union representatives shall be those set forth in Section 501 (29 U.S.C. § 501) of the Labor Management Reporting and Disclosure Act set forth in Appendix 3 of this document.

Section 2. Embezzlement from the Union or a Local, stealing of money or property from the Union or a Local, unlawful and willful conversion of any money or property of the Union or a Local, or any other breach of fiduciary duty imposed under this Article or by law shall be cause for expulsion from the Union in addition to any other appropriate penalties called for in the Union's governing documents or by law.

Section 3. No loan, directly or indirectly, of money or property of the Union or Local shall be made to any officeholder, employee, agent, Union Steward, or other representative of the Union or Local. However, this Section shall not prevent use by an employee of an automobile, leased by the Union, for the employee's reasonable private use where the automobile is used primarily for Union business and the lease-use arrangement results in a net benefit to the Union.

Section 4. All persons who handle funds or other property of the Union, except officers of Locals using the Central Ledger System, shall be bonded under a blanket bond which shall meet the following requirements:

(a) Protection shall be provided against loss by reason of fraud or dishonesty on the part of such person or through connivance with others.

(b) The coverage shall be in an amount not less than 10 percent (10%) of the funds and value of property handled by such person during the preceding fiscal year, up to a maximum of \$500,000.

(c) The bond shall be individual or schedule in form.

(d) The surety shall be a corporate surety company.

Section 5. Any person not covered by bond under Section 4 above shall not receive, handle, disburse, or otherwise exercise custody or control of funds or property of the Union or of a trust in which the Union is interested. No such bond shall be placed through an agent or broker or with a surety company in which the Union or any officeholder, employee, agent, Union Steward, or other representative of the Union has any direct or indirect interest. Such surety company shall be a company, which has met the requirements to be an acceptable surety on federal bonds.

ARTICLE XXI - GENERAL FINANCIAL MATTERS

Section 1. The fiscal year of the Union is October 1 through September 30.

Section 2. The Union's revenues will be accounted for in three categories: (1) dues and fair share money, (2) non-dues income, and (3) voluntary contributions. Expenditures for all aspects of collective bargaining, including the necessary work for legislative approval, for merit system benefit grievances, and discharge and discipline cases under the statutes shall ordinarily be paid out of dues and fair share revenues. Expenditures for the non-bargaining aspects of the Union, publications and General Council; for programs for services and benefits for the common good of represented employees; and for all programs limited to members only, shall ordinarily be paid out of dues income. Voluntary contributions shall be spent as provided for by the donor.

Section 3. The Board shall establish and maintain a General Fund Account for recording all income to the Union except those funds under custodianship of the Union.

Section 4. There will be a Prudent Reserve of 16.6% (sixteen point six percent) – two months of operating expenses – of each year's operating budget in a Special Fund. Each year's calculation of 16.6% will be based on budgeted expenditures for the same year. If the balance of the Prudent Reserve Fund falls below the required level then action will be taken by the end of the fiscal year to restore the reserve to the required level through transfer of funds from the operating budget, at a rate to be determined by the Board of Directors but no less than ten cents per dues member and fair share payer per month.

Withdrawals from the Prudent Reserve Fund require a 2/3 majority vote of the Board of Directors. The Board shall have the authority to authorize placement of amounts in excess of the Prudent Reserve into the Special Fund.

The Special Fund may be augmented from any lawful source, such as gifts or the income therefrom, and interest earned on invested funds.

Section 6. All Union money shall be invested by the Union Finance Committee in such a way as to obtain a maximum rate of interest within prudent guidelines adopted by the Board, taking into account the requirements and policies of the Union and benefit to the members.

Section 7. The total annual budget of the Union as approved by the General Council, or the Board in odd numbered years, shall not be exceeded, except by authority of the Board or General Council.

ARTICLE XXII - CENTRAL LEDGER AND LOCAL FUNDING

Section 1. All Locals shall participate in the Central Ledger Accounting System.

Section 2. The Union shall maintain a Local Funds Account into which shall be deposited rebates for all Locals. This account shall remain separate and distinct from all other accounts maintained by the Union. The Union shall maintain a list of those officers in each local authorized to disburse local funds. No member, officer, employee, or body of the Union other than the General Council may divert or spend funds deposited in a particular Local's account without the approval of that specific Local.

Section 3. Local Rebates.

(a) Out of each member or fair share payer's dues received at Headquarters, there shall be returned to each Local on a quarterly basis the following amounts except that the Local shall receive an extra five (5) cents per member per month for each CAPE contributor in its membership.

90¢ per member per month for single site Locals.

70¢ per fair share payer per month for single site Locals.

\$1.10 per member per month for statewide Locals.

90¢ per fair share payer per month for statewide Locals.

(b) In addition to the rebate system outlined above, newly organized Locals that have ratified their first contract shall be granted an initial treasury equal to two (2) full rebate cycles based on the above formula in order to carry out the business of their new Local. This initial rebate grant

is on a one time only basis, shall be allocated from the Union's General Fund, and is not required to be repaid. In no event will a Local receive less than \$100 per quarter, except as noted below.

(c) Should a Local accrue an amount equal to two (2) full years of rebates in their account, rebates above that amount shall be redirected to the General Fund. Locals that have more than two (2) full years of rebates as of September 1, 2008, shall keep that balance and not receive rebates until their account balance is lower than two (2) full years of their rebates. Locals that have one hundred members or less will be exempt from the two year cap and be allowed to keep up to three (3) years of their full rebates.

(d) Local rebates shall not be sent to Locals in inactive status.

Section 4. Local Budgets.

(a) Locals shall file an annual budget with Headquarters. Locals not filing an annual budget within forty-five (45) days from the end of the fiscal year will have their next quarterly rebate checks reduced by the following amount: 50 percent (50%) for all quarters until the annual budget is filed with Headquarters.

(b) Funds not rebated to Locals due to delinquent filing of annual budgets will be transferred to the Union's general fund. The exception to this procedure will occur when Local financial records are being held for audit, or other extenuating circumstances, with the Union Secretary-Treasurer's approval.

Section 5. Job-Share Positions. The term "job-share" shall be defined as "one (1) full-time position in employment held by more than one (1) employee". Each job-share partner shall have full membership and voting rights and benefits in the Union.

Section 6. Headquarters shall issue checks to members and/or vendors upon receipt of a completed "Request for Reimbursement" form approved by two (2) authorized officers of the involved Local along with all necessary receipts.

Section 7. Headquarters shall issue advance payment for mileage from the central ledger account when a member is required to spend his/her money on official Union business when such a requirement would pose a hardship to the member with the approval of appropriate officers of the involved Local. Subsequent providing of all necessary receipts to Headquarters, however, will still be required.

Section 8. A monthly report on the disbursements and balances of all accounts in the Central Ledger shall be made available to the appropriate Local officials.

Section 9. Interest earned on the funds held by Headquarters in the Central Ledger Accounting System shall be divided among the Locals participating in the system. This interest shall be prorated based on the balances in each Local account at the end of each quarter.

Section 10. The monthly billing for the Local shall be mailed to the President, Vice President, Secretary and Treasurer of the Local. If the billing is still unpaid in sixty (60) days, a second notice will be sent to the officers giving the Local twenty (20) days to pay. Notwithstanding Section 2 of this Article, if the billing is still unpaid at the end of the twenty (20) days, the Statewide President or Secretary-Treasurer can authorize payment from the Local central ledger with a copy of the transaction to the Local Officers.

ARTICLE XXIII - INACTIVATION OF LOCALS

Section 1. Failure to Fill Local Offices. Any Local that has no officers may be declared inactive by Board of Directors' action at the first meeting of the Board following:

(a) Vacancy of the offices of President, Vice President, and Secretary-Treasurer of the Local, or

(b) Failure of the Local to elect officers as required under Article XVI Section 7 of this document.

Section 2. Failure to File Constitution and Bylaws. Any Local that fails to file an authenticated copy of that Local's constitution and bylaws will be notified in writing by the Union Secretary-Treasurer to file such documents within sixty (60) days of the notice. If such documents are not filed with Headquarters in the allotted time, the Board shall declare such Local inactive at the Board's next regular meeting.

Section 3. Violation of Constitution. Any Local that violates any provision of this document shall be notified in writing by the President of the Union of the specific violation alleged. The notification shall include a specific directive for the Local to cease such action. If the Local continues such violation(s), the Local shall be declared inactive at the next regular Board meeting. Prior to such declaration, the Local President will be given twenty (20) days' written notice by the President to appear at the Board meeting to defend the action of the Local.

Section 4. Board action to inactivate a Local under Sections 1 through 3 of this Article shall require a two-thirds (2/3) vote of the Board of Directors.

Section 5. Return to Active Status. A Local will be returned to active status when the Board receives acceptable evidence from the Local that the circumstances causing the inactive status no longer exist. The Board shall notify the Local President and Headquarters of the Local's active status. The notification will state the evidence on which the Board based the decision to return the Local to active status. Any Local returning from inactive to active status, shall have Local funds set up in the central ledger account.

Section 6. If the Local remains inactive for six months and no steps have been taken to reactivate the Local, the Board shall appoint a trustee in accordance with Article XXIV of this document.

ARTICLE XXIV - TRUSTEESHIP OF LOCALS

Section 1. The Board may appoint a Trustee to take charge and control of a Local or of an affiliated body for the purpose of correcting corruption or financial malpractice; assuring the performance of collective bargaining agreements or other duties of a bargaining representative; restoring democratic procedures; or otherwise carrying out the legitimate objects of the Union as defined in this document. The Trustee shall reconsider the status of the Local monthly to determine whether the Local has come into compliance or if continuance of the trusteeship is warranted.

Section 2. The Trustee shall be authorized and empowered to take full charge of the financial affairs of the Local or affiliated body, and to take such other action as is necessary to preserve the Local or affiliated body and its interests. The Trustee shall report on the affairs and transactions of the Local or affiliated body to the Union Finance Committee. The Trustee and all of the acts of the Trustee shall be subject to the supervision and direction of the Secretary-Treasurer.

Section 3. The Local shall receive notice of the charges and be given an opportunity to defend said actions. Upon the institution of the trusteeship all money, books, and property of the Local or affiliated body shall be turned over to the Trustee, who shall issue a receipt for them.

Section 4. The Trustee shall be bonded for the faithful discharge of his or her duties relating to the handling of funds or other property of the Local or affiliated body.

Section 5. The Trustee shall take charge of all the funds, books, papers, and other property of the Local or affiliated body that he or she has received. The Trustee shall pay all outstanding claims, properly proved, if funds are sufficient. When self-government is restored, the Trustee shall return all funds, books, papers, and other property to the Local or affiliated body. If, however, the Local

or affiliated body is dissolved, then any balance remaining to the credit of the Local or affiliated body shall be forwarded to the Secretary-Treasurer and shall become the property of SEIU Local 503, OPEU.

Section 6. Any Local or affiliated body in trusteeship may, within ten (10) days from the institution of such trusteeship, file an appeal to the Executive Committee by a written communication addressed to the Secretary-Treasurer. If an appeal is so filed, the Executive Committee shall provide for a hearing within thirty (30) days of the filing of such appeal before the Executive Committee. The decision of the Executive Committee shall be final and binding. Pending such decision, the trusteeship shall remain in full force and effect.

Section 7. The Trustee shall file all reports required by the Labor-Management Reporting and Disclosure Act of 1959 and Civil Service Reform Act of 1978 with the Office of Labor-Management Standards.

Section 8. The Trustee shall make a full report of his or her work at each Board meeting including but not limited to all efforts made to return the Local to self-governance.

Section 9. A formal hearing will be conducted by the Executive Committee at twelve (12) and eighteen (18) months to determine whether adequate justification exists to continue the trusteeship.

ARTICLE XXV - LEGAL COMPLIANCE

Section 1. It is the intent of this Union that its governing documents comply with all applicable laws including, but not limited to, the Labor-Management Reporting and Disclosure Act of 1959. To the extent any specific provision(s) of the governing documents is(are) not in compliance with applicable law, the specific provision shall be null and void.

Section 2. The President and Secretary-Treasurer, acting with appropriate staff, are responsible on an annual basis for the preparation, signing and filing of a Report of Labor Organization (LM-2) as required under the Labor Management Reporting and Disclosure Act (LMRDA) provisions set forth in Appendix 6 of this document. Such report and the information contained in the report will be made available to members of the Union as set forth in subsection (c) of the statutory provisions set for the in Appendix 6.

Section 3. All Statewide Officers, Local Officers, Directors, Assistant Directors and certain Union staff are required, on an annual basis, to disclose information detailed in the provisions of the Labor Management Reporting and Disclosure Act (LMRDA) set forth in Appendix 7 of this document on forms provided to them by the Union. The Union will submit the information disclosed to the Secretary of

Labor as required by the statutory provision. Such filings will be made available to members for inspection upon reasonable request.

ARTICLE XXVI - POLITICAL ACTION PROGRAM

Section 1. The Union's political action program with respect to candidate endorsements and expenditures shall be administered by Citizen Action for Political Education (CAPE) (as outlined in its bylaws) which will make recommendations for endorsements to the Board for final action by a 2/3 majority vote of the Board.

Section 2. All financial matters of CAPE shall be kept separate from all other Union financial matters, and CAPE funds shall be kept separate from all other Union funds and shall not be commingled at any time.

Section 3. A Local may not endorse or give money to any candidate or conduct an independent campaign that is not authorized by the Board.

Section 4. The Union is politically non-partisan.

ARTICLE XXVII – NO DISCRIMINATION

The Union, its officeholders, employees, agents, Union Stewards, and other representatives, shall not discriminate, against any person because of disabilities, race, religion, color, national origin, political belief, gender, gender identification, marital status, age, or sexual orientation.

ARTICLE XXVIII - AMENDMENT OF BYLAWS

Section 1. These Bylaws and Appendices may be amended, repealed, suspended, or replaced by:

(a) Proposals to the General Council in regular session, adopted by a two-thirds (2/3) vote of the General Council, or

(b) Initiative petition, either signed by 20 percent (20%) of the total active membership, or endorsed by 30 percent (30%) of the Locals, or endorsed by the Board. Such petition shall be addressed to the Union and filed at Headquarters. If it bears the required signatures or endorsements, balloting shall take place as provided in Article IX, GENERAL COUNCIL, Section 9, Voting Between Sessions, of the Bylaws. Adoption will be by a two-thirds (2/3) vote of the eligible delegates.

Section 2. In the event of enactment of federal or state legislation imposing obligations on the Union as to elections, membership rights, accounting and

disclosure, officer conduct, retention of records, bonding, financial relationships of officeholders and employees, etc., which are not already imposed by the Union's Bylaws and which are not within the authority of the Board to impose, the federal or state legislation will control.

ARTICLE XXIX - PARLIAMENTARY AUTHORITY

The rules contained in the current edition of Robert's Rules of Order Newly Revised shall govern the Union, the Board, and Officers in all cases to which they are applicable and in which they are consistent with this document, the Union's AP&P or any special rules of order the Union may adopt.

APPENDIX 1
(See Article XI Section 1 Of Bylaws)
DIRECTOR AND ASSISTANT DIRECTOR SEATS

Directors and Assistant Directors are elected in the following numbers.

- 1. One member employed by OUS;**
- 2. One member employed by an agency in the DHS Coalition of DAS;**
- 3. One member employed by an agency in the ODOT Coalition of DAS;**
- 4. One member employed by an agency in the Specials Coalition of DAS;**
- 5. One member employed by an agency in the Institutions Coalition of DAS;**
- 6. One member employed by a Local government;**
- 7. One member employed by a private non-profit agency;**
- 8. One member in the Client Employed Provider program or a private home care agency;**
- 9. One member employed by a nursing home;**
- 10. One member employed as a child care provider;**
- 11. One member employed as an adult foster home provider;**
- 12. One member who works in the North Central/Eastern Oregon region;**
- 13. One member who works in the South Central/Eastern Oregon region;**
- 14. One member who works in the Southern Oregon region;**
- 15. One member who works in the Oregon Coast region;**
- 16. One member who works in the West Central Valley region;**
- 17. One member who works in the East Central Valley region;**
- 18. Two members who work in the Salem region;**
- 19. One member who works in the Salem area/Polk/Yamhill County region;**
- 20. One member who works in the South/Western Portland Metro region;**
- 21. One member who works in the West Portland region;**
- 22. One member who works in the Portland Eastside region;**
- 23. The Statewide President of SEIU Local 503, OPEU;**
- 24. The Statewide Vice President of SEIU Local 503, OPEU;**
- 25. The Statewide Secretary-Treasurer of SEIU Local 503, OPEU;**
- 26. The Statewide Past President of SEIU Local 503, OPEU;**
- 27. The Executive Director of SEIU Local 503, OPEU; and**
- 28. The President of the Retirees' Local of SEIU Local 503. OPEU.**

(a) For the North Central/Eastern Oregon region, One Director elected by members from ZIP Code areas 97004, 97009, 97010, 97011, 97014, 97017, 97019, 97021, 97022, 97023, 97028, 97029, 97031, 97033, 97039, 97040, 97041, 97042, 97044, 97049, 97050, 97055, 97057, 97058, 97063, 97065, 97067, 97732, 97801, 97810, 97812, 97813, 97818, 97820, 97821, 97823, 97824, 97825, 97826, 97827, 97828, 97831, 97835, 97836, 97838, 97839, 97840, 97841, 97842, 97843, 97844, 97846, 97850, 97857, 97859, 97861, 97862, 97865, 97868, 97869, 97875, 97876, 97880, 97882, 97883, 97885, 97886; and

(b) For the South Central/Eastern Oregon region, One Director elected by members from ZIP Code areas, 97001, 97037, 97038, 97342, 97346, 97350, 97413, 97425, 97427, 97443, 97447, 97463, 97484, 97492, 97601, 97602, 97603, 97604, 97620, 97621, 97622, 97623, 97624, 97625, 97626, 97627, 97630, 97632, 97633, 97634, 97635, 97636, 97637, 97638, 97639, 97640, 97641, 97701, 97702, 97707, 97708, 97709, 97710, 97711, 97712, 97720, 97721, 97722, 97730, 97731, 97733, 97734, 97735, 97736, 97737, 97738, 97739, 97741, 97750, 97751, 97752, 97753, 97754, 97756, 97758, 97759, 97760, 97761, 97814, 97817, 97819, 97830, 97833, 97834, 97837, 97845, 97848, 97856, 97864, 97867, 97870, 97872, 97873, 97874, 97877, 97884, 97901, 97902, 97903, 97904, 97905, 97906, 97907, 97908, 97909, 97910, 97911, 97913, 97914, 97917, 97918, 97920; and

(c) For the Southern Oregon region, One Director elected by members from ZIP Code areas 97410, 97416, 97417, 97429, 97432, 97442, 97457, 97469, 97470, 97481, 97494, 97495, 97496, 97497, 97501, 97502, 97503, 97504, 97520, 97522, 97523, 97524, 97525, 97526, 97527, 97528, 97530, 97531, 97532, 97533, 97534, 97535, 97536, 97537, 97538, 97539, 97540, 97541, 97543, 97544; and

(d) For the Oregon Coast region, One Director elected by members from ZIP Code areas 97016, 97018, 97048, 97051, 97053, 97054, 97064, 97102, 97103, 97106, 97107, 97108, 97109, 97110, 97112, 97116, 97117, 97118, 97119, 97121, 97122, 97125, 97130, 97131, 97133, 97134, 97135, 97136, 97138, 97141, 97143, 97144, 97145, 97146, 97147, 97149, 97203, 97231, 97326, 97341, 97343, 97344, 97347, 97357, 97364, 97365, 97366, 97367, 97368, 97369, 97372, 97376, 97380, 97388, 97390, 97391, 97394, 97396, 97406, 97407, 97411, 97414, 97415, 97420, 97423, 97439, 97441, 97444, 97449, 97450, 97453, 97458, 97459, 97464, 97465, 97466, 97467, 97473, 97476, 97480, 97491, 97493, 97498; and

(e) For the West Central Valley region, One Director elected by members from ZIP Code areas 97056, 97324, 97370, 97401, 97402, 97403 97404, 97405, 97408, 97409, 97412, 97419, 97426, 97428, 97430, 97435, 97436, 97437, 97440, 97448, 97451, 97456, 97461, 97462, 97486, 97487, 97490, 97499; and

(f) For the East Central Valley region, One Director elected by members from ZIP Code areas 97321, 97322, 97327, 97329, 97330, 97331, 97333, 97335, 97336, 97339, 97345, 97348, 97355, 97374, 97377, 97386, 97389, 97424, 97431, 97434, 97438, 97446, 97452, 97454, 97455, 97472, 97477, 97478, 97479, 97482, 97488, 97489; and

(g) For the Greater Salem region, Two Directors elected by members from ZIP Code areas 97301, 97302, 97305, 97306, 97308, 97309, 97311, 97312, 97313, 97314, 97317, 97325, 97352, 97358, 97360, 97375, 97381, 97383, 97385, 97392; and

(h) For the West Salem/ Polk County region, One Director elected by members from ZIP Code areas 97304, 97310, 97338, 97351, 97361; and

(i) For the North Valley region, One Director elected by members from ZIP Code areas 97002, 97005, 97006, 97007, 97008, 97013, 97020, 97026, 97032, 97062, 97070, 97071, 97075, 97076, 97077, 97078, 97101, 97111, 97113, 97114, 97115, 97123, 97124, 97127, 97128, 97132, 97137, 97140, 97148, 97210, 97224, 97225, 97229, 97298, 97303, 97307, 97362, 97371, 97373, 97378, 97384; and

(j) For the West Portland region, One Director elected by members from ZIP Code areas 97201, 97202, 97204, 97205, 97207, 97208, 97209, 97211, 97212, 97214, 97217, 97218, 97221, 97227, 97228, 97232, 97239, 97240, 97242, 97251, 97253, 97254, 97255, 97256, 97258, 97259, 97271, 97272, 97299, 97280, 97281, 97283, 97290, 97291, 97293, 97296; and

(k) For the Greater Portland region, One Director elected by members from ZIP Code areas 97015, 97024, 97027, 97030, 97034, 97035, 97036, 97045, 97060, 97068, 97080, 97086, 97089, 97206, 97213, 97215, 97216, 97219, 97220, 97222, 97223, 97230, 97233, 97236, 97238, 97266, 97267, 97268, 97269, 97282, 97286, 97292, 97294.

END OF APPENDIX 1

APPENDIX 2
(See Article V Section 3 of Bylaws)

TITLE I -- BILL OF RIGHTS OF MEMBERS OF LABOR ORGANIZATIONS

Bill of Rights

(29 U.S.C. 411)

SEC. 101. (a)(1) EQUAL RIGHTS.-- Every member of a labor organization shall have equal rights and privileges within such organization to nominate candidates, to vote in elections or referendums of the labor organization, to attend membership meetings and to participate in the deliberations and voting upon the business of such meetings, subject to reasonable rules and regulations in such organization's constitution and bylaws.

(2) FREEDOM OF SPEECH AND ASSEMBLY.-- Every member of any labor organization shall have the right to meet and assemble freely with other members; and to express any views, arguments, or opinions; and to express at meetings of the labor organization his views, upon candidates in an election of the labor organization or upon any business properly before the meeting, subject to the organization's established and reasonable rules pertaining to the conduct of meetings: *Provided*, That nothing herein shall be construed to impair the right of a labor organization to adopt and enforce reasonable rules as to the responsibility of every member toward the organization as an institution and to his refraining from conduct that would interfere with its performance of its legal or contractual obligations.

(3) DUES, INITIATION FEES, AND ASSESSMENTS.-- Except in the case of a federation of national or international labor organizations, the rates of dues and initiation fees payable by members of any labor organization in effect on the date of enactment of this Act shall not be increased, and no general or special assessment shall be levied upon such members, except-

(A) in the case of a Local organization, (i) by majority vote by secret ballot of the members in good standing voting at a general or special membership meeting, after reasonable notice of the intention to vote upon such question, or (ii) by majority vote of the members in good standing voting in a membership referendum conducted by secret ballot; or

(B) in the case of a labor organization, other than a Local labor organization or a federation of national or international labor organizations, (i) by majority vote of the delegates voting at a regular convention, or at a special convention of such labor organization held upon not less than thirty days' written notice to the principal office of each Local or constituent labor organization entitled to such

notice, or (ii) by majority vote of the members in good standing of such labor organization voting in a membership referendum conducted by secret ballot, or (iii) by majority vote of the members of the executive board or similar governing body of such labor organization, pursuant to express authority contained in the constitution and bylaws of such labor organization: *Provided* That such action on the part of the executive board or similar governing body shall be effective only until the next regular convention of such labor organization.

(4) PROTECTION OF THE RIGHT TO SUE.-- No labor organization shall limit the right of any member thereof to institute an action in any court, or in a proceeding before any administrative agency, irrespective of whether or not the labor organization or its officers are named as defendants or respondents in such action or proceeding, or the right of any member of a labor organization to appear as a witness in any judicial, administrative, or legislative proceeding, or to petition any legislature or to communicate with any legislator: *Provided*, That any such member may be required to exhaust reasonable hearing procedures (but not to exceed a four-month lapse of time) within such organization, before instituting legal or administrative proceedings against such organizations or any officer thereof: *And provided further*, That no interested employer or employer association shall directly or indirectly finance, encourage, or participate in, except as a party, any such action, proceeding, appearance, or petition.

(5) SAFEGUARDS AGAINST IMPROPER DISCIPLINARY ACTION.-- No member of any labor organization may be fined, suspended, expelled, or otherwise disciplined except for nonpayment of dues by such organization or by any officer thereof unless such member has been (A) served with written specific charges; (B) given a reasonable time to prepare his defense; (C) afforded a full and fair hearing.

(b) Any provision of the constitution and bylaws of any labor organization which is inconsistent with the provisions of this section shall be of no force or effect.

Civil Enforcement

(29 U.S.C. 412)

SEC. 102. Any person whose rights secured by the provisions of this title have been infringed by any violation of this title may bring a civil action in a district court of the United States for such relief (including injunctions) as may be appropriate. Any such action against a labor organization shall be brought in the district court of the United States for the district where the alleged violation occurred, or where the principal office of such labor organization is located.

Retention of Existing Rights

(29 U.S.C. 413)

SEC. 103. Nothing contained in this title shall limit the rights and remedies of any member of a labor organization under any State or Federal law or before any court or other tribunal, or under the constitution and bylaws of any labor organization.

Right to Copies of Collective Bargaining Agreements

(29 U.S.C. 414)

SEC. 104. It shall be the duty of the secretary or corresponding principal officer of each labor organization, in the case of a Local labor organization, to forward a copy of each collective bargaining agreement made by such labor organization with any employer to any employee who requests such a copy and whose rights as such employee are directly affected by such agreement, and in the case of a labor organization other than a Local labor organization, to forward a copy of any such agreement to each constituent unit which has members directly affected by such agreement; and such officer shall maintain at the principal office of the labor organization of which he is an officer copies of any such agreement made or received by such labor organization, which copies shall be available for inspection by any member or by any employee whose rights are affected by such agreement. The provisions of section 210 shall be applicable in the enforcement of this section.

Information as to Act

(29 U.S.C. 415)

SEC. 105. Every labor organization shall inform its members concerning the provisions of this Act.

END OF APPENDIX 2

APPENDIX 3
(See Article XX Section 1 of Bylaws)

FIDUCIARY DUTIES

SEC. 501. (a) The officers, agents, shop stewards, and other representatives of a labor organization occupy positions of trust in relation to such organization and its members as a group. It is, therefore, the duty of each such person, taking into account the special problems and functions of a labor organization, to hold its money and property solely for the benefit of the organization and its members and to manage, invest, and expend the same in accordance with its constitution and bylaws and any resolutions of the governing bodies adopted thereunder, to refrain from dealing with such organization as an adverse party or in behalf of an adverse party in any matter connected with his duties and from holding or acquiring any pecuniary or personal interest which conflicts with the interests of such organization, and to account to the organization for any profit received by him in whatever capacity in connection with transactions conducted by him or under his direction on behalf of the organization. A general exculpatory provision in the constitution and bylaws of such a labor organization or a general exculpatory resolution of a governing body purporting to relieve any such person of liability for breach of the duties declared by this section shall be void as against public policy.

(b) When any officer, agent, shop steward, or representative of any labor organization is alleged to have violated the duties declared in subsection (a) and the labor organization or its governing board or officers refuse or fail to sue or recover damages or secure an accounting or other appropriate relief within a reasonable time after being requested to do so by any member of the labor organization, such member may sue such officer, agent, shop steward, or representative in any district court of the United States or in any State court of competent jurisdiction to recover damages or secure an accounting or other appropriate relief for the benefit of the labor organization. No such proceeding shall be brought except upon leave of the court obtained upon verified application and for good cause shown which application may be made ex parte. The trial judge may allot a reasonable part of the recovery in any action under this subsection to pay the fees of counsel prosecuting the suit at the instance of the member of the labor organization and to compensate such member for any expenses necessarily paid or incurred by him in connection with the litigation.

(c) Any person who embezzles, steals, or unlawfully and willfully abstracts or converts to his own use, or the use of another, any of the moneys, funds, securities, property, or other assets of a labor organization of which he is an officer, or by which he is employed, directly or indirectly, shall be fined not more than \$10,000 or imprisoned for not more than five years, or both.

END OF APPENDIX 3

APPENDIX 4
(See Article VI Section 1 of Bylaws)

DISCIPLINARY PROCESS TRIALS AND APPEALS

Section 1. Charges against any Member or Officer shall be filed with the Secretary-Treasurer of the Union unless the charges filed are against the Secretary-Treasurer whereby they will be filed with the President.

- a) The charges must specify the events or acts that the charging party believes constitute misconduct and the Article(s) and Section(s) of the Bylaws the charging party believes have been violated.**
- b) The charge should also be accompanied by any documents, sworn statements or other evidence that the charging party believes lend support to the charge(s).**
- c) No charges may be filed more than six months after the charging party learned, or could have reasonably learned, of the act or acts which are the basis of the charges.**

Section 2. The Secretary-Treasurer shall promptly provide a copy of the charge and any supporting documents to the charged party either in person or by registered or certified mail, directed to the last known address of the charged party.

Section 3. The Secretary-Treasurer shall provide a copy of the charge and supporting material to the chair of the Member Representation Committee and the Committee shall review the charges and supporting documents.

- a) If the charges are deemed incomplete, insufficiently specific or otherwise defective, the Member Representation Committee may dismiss the charges at this stage. The charging party is free to re-file charges with any defects corrected, so long as the re-filing is timely under Section 1(c) above.**
- b) If the Member Representation Committee determines the charges are not deficient and otherwise present allegations that, if proven, would constitute misconduct under the applicable terms of the Bylaws, the Committee Chair shall so inform the charged party and afford the charged party 45 days to show cause why the charges should not be presented to the Board for further processing. The Charging Party may submit evidence in the form of documents or sworn statements.**

c) Within 45 days of the receipt of the charging party's evidence, the Member Representation Committee can dismiss the charges or refer them to the Board of Directors by means of delivery of the charges and all other materials to the Secretary-Treasurer, unless charges filed are against the Secretary-Treasurer whereby they will be filed with the President. If the charges are dismissed, the charging party may appeal the dismissal to the Board. Such appeal must be in writing and delivered to the Board by service on the Secretary-Treasurer, unless charges filed are against the Secretary-Treasurer whereby the appeal will be filed with the President within 10 days of the notice of dismissal.

Section 4. The Board shall appoint a Trial Committee of 5 Union Members to act as the trial committee. In exercising their discretion, the Board will endeavor to preclude individuals from acting as a Trial Committee member if there is good cause to believe that person may be biased or to have pre-judged the case. The Trial Committee members shall not be from the same Local as the accused. The Trial Committee shall be chaired by the Secretary-Treasurer, unless charges filed are against the Secretary-Treasurer whereby the Trial Committee will be chaired by the President.

Section 5. On all charges referred to it, the Trial Committee shall appoint the charging party or another Member who is not an attorney to present the charges and the relevant evidence on behalf of the charging party. The accused may appear in person and with witnesses to answer the charges against him/her. The accused may select a member of the Union to represent him/her in the presentation of a defense but may not be represented by legal counsel.

Section 6. Upon all charges referred to it, the Board shall set a hearing date no less than 30 days after the Boards' receipt of the charges. Either the charged party or the person designated to present the evidence on behalf of the charging party may, for good cause, request additional time to prepare the case for presentation to the Board. Extensions of time beyond 30 days after the original hearing date shall be granted only in extraordinary circumstances.

Section 7. If the accused fails to present a defense either in person or in writing, they shall be found guilty.

Section 8. The hearing shall be conducted in a fair and impartial manner. Both parties shall be permitted to call witnesses and present material and relevant evidence. Both parties shall be permitted to cross examine witnesses.

Section 9. Upon conclusion of the case, the Trial Committee shall take the matter under deliberation. The decision of the Trial Committee shall be determined by majority vote on whether the charges have or have not been sustained. In the event the charges are sustained, the trial body shall also

determine the appropriate discipline in accordance with the applicable provisions of the Bylaws. The trial body shall deliver its determination to the Board of Directors. The Board of Directors shall adopt the decision and determination of the Trial Committee and direct any actions called for therein.

Section 10. An appeal of the decision of the Board of Directors or the Trial Committee may be made within 45 days by either the accused or the member filing the charges to the International Executive Board and to such other bodies of the International Union that are allowed pursuant to the procedures set forth in the International Union's Bylaws.

Section 11. Subject to the provisions of applicable statutes, every Member or Officer of the Union against whom charges have been made and disciplinary action taken as a result thereof or who claims to be aggrieved as a result of adverse rulings or decisions rendered, agrees, as a condition of membership and the continuation of membership to exhaust all remedies provided for herein and in the Constitution and Bylaws of the International Union and the Local Union, and further agrees not to file or prosecute any action in any court, tribunal or other agency until those remedies have been exhausted.

END OF APPENDIX 4

APPENDIX 5
(See Article VII Section 2 of Bylaws)

REMOVAL OF OFFICERS

Section 1. The following shall apply to officers elected after September 2008.

(a) Holders of office in Locals may be removed from office, as provided for in the involved Local's constitution and bylaws. If no provisions or procedures exist in the involved Local's constitution and bylaws, such officers may be removed from office as provided for under the procedure established in subsection (b) for the removal of other office holders.

(b) Statewide Officers, and holders of all other offices at any level of the Union, may be removed from office by a simple majority vote of the membership eligible to vote for that office and voting. Balloting will occur when called for by initiative petitions bearing signatures of 10 percent 10% of the membership eligible to vote for the office in question as described herein.

(1) To initiate the office holder recall process, the proponent(s) of a proposed recall shall submit a written notice of intent to the chairperson of the Member Representation Committee. The date of this submission shall be the recall initiation date.

(2) To be counted toward satisfaction of the ten percent recall election threshold, recall petition signatures must be gathered within the one hundred eighty (180) days immediately following the recall initiation date; each signature must be dated by the signer at the time of signing; and the signer must have been a member of the Union eligible to vote for the office in question on the date of signing.

(3) Petitions may be delivered to the chairperson of the Member Representation Committee at any time within the one hundred eighty (180) days immediately following the recall initiation date, but no more than seven (7) days after the expiration of that one hundred eighty (180) days.

(4) Upon receipt of such petitions, the chairperson of the Member Representation Committee, together with the members of the Committee, shall determine the validity of membership within fifteen (15) days of their presentation.

(5) For the purpose of determining whether the number of valid signatures satisfies the ten percent recall election threshold, the number of members eligible to vote for the office in question shall be the number of members who were eligible to vote for the office in question on the recall initiation date.

(c) For a Local officer recall, results of the petitions shall be sent to the Local involved. For all other recalls, the results will be sent to the Board. If the threshold has been met, the appropriate governing body shall order an election to be held, within thirty (30) days after the Member Representation Committee determines that the requirements of subsection (b) have been fulfilled. Elections shall be conducted in accordance with Bylaws Article III, GENERAL ELECTION REQUIREMENTS; and/or Article IV, LOCAL ELECTIONS; and/or Article V, DIRECTOR AND ASSISTANT DIRECTOR ELECTIONS; and/or Article VI, STATEWIDE OFFICER ELECTIONS. After validation, the chairperson of the Member Representation Committee will transmit ballots to the membership for a vote. Ballots will be returned to the Member Representation Committee for tabulation. Results by Local will be published in the next issue of the union newsletter. Where the majority vote is for removal, it shall be effective upon completion of tabulation and the officeholder shall be formally notified by the Board or its designee.

(d) Recall petition campaigns and election campaigns shall be conducted in accordance with Article III GENERAL ELECTION REQUIREMENTS Section 7 (a), 7 (b), and 7 (c), such that no union or employer funds shall be used to promote such campaigns, and all members shall have the right to support and or participate in such campaigns without being subject to any penalty, discipline or other improper interference or reprisal.

Section 2. A person whose membership has been revoked may be reinstated by a three-fourths (3/4) vote of the Board after six (6) months from the date of revocation.

END OF APPENDIX 5

APPENDIX 6
(See Article XXV Section 2 of Bylaws)

**LABOR MANAGEMENT REPORTING AND DISCLOSURE ACT REQUIREMENTS FOR
LABOR ORGANIZATION REPORTING (LM-2)**

(29 U.S.C. 431)

SEC. 201. (a) Every labor organization shall adopt a constitution and bylaws and shall file a copy thereof with the Secretary, together with a report, signed by its president and secretary or corresponding principal officers, containing the following information-

(1) the name of the labor organization, its mailing address, and any other address at which it maintains its principal office or at which it keeps the records referred to in this title;

(2) the name and title of each of its officers;

(3) the initiation fee or fees required from a new or transferred member and fees for work permits required by the reporting labor organization;

(4) the regular dues or fees or other periodic payments required to remain a member of the reporting labor organization; and

(5) detailed statements, or references to specific provisions of documents filed under this subsection which contain such statements, showing the provisions made and procedures followed with respect to each of the following: (A) qualifications for or restrictions on membership, (B) levying of assessments, (C) participation in insurance or other benefit plans, (D) authorization for disbursement of funds of the labor organization, (E) audit of financial transactions of the labor organization, (F) the calling of regular and special meetings, (G) the selection of officers and stewards and of any representatives to other bodies composed of labor organizations' representatives, with a specific statement of the manner in which each officer was elected, appointed, or otherwise selected, (H) discipline or removal of officers or agents for breaches of their trust, (I) imposition of fines, suspensions, and expulsions of members, including the grounds for such action and any provision made for notice, hearing, judgment on the evidence, and appeal procedures, (J) authorization for bargaining demands, (K) ratification of contract terms, (L) authorization for strikes, and (M) issuance of work permits. Any change in the information required by this subsection shall be reported to the Secretary at the time the reporting labor organization files with the Secretary the annual financial report required by subsection (b).

(b) Every labor organization shall file annually with the Secretary a financial report signed by its president and treasurer or corresponding principal officers containing the following information in such detail as may be necessary accurately to disclose its financial condition and operations for its preceding fiscal year-

(1) assets and liabilities at the beginning and end of the fiscal year;

(2) receipts of any kind and the sources thereof,

(3) salary, allowances, and other direct or indirect disbursements (including reimbursed expenses) to each officer and also to each employee who, during such fiscal year, received more than \$10,000 in the aggregate from such labor organization and any other labor organization affiliated with it or with which it is affiliated, or which is affiliated with the same national or international labor organization;

(4) direct and indirect loans made to any officer, employee, or member, which aggregated more than \$250 during the fiscal year, together with a statement of the purpose, security, if any, and arrangements for repayment;

(5) direct and indirect loans to any business enterprise, together with a statement of the purpose, security, if any, and arrangements for repayment; and

(6) other disbursements made by it including the purposes thereof, all in such categories as the Secretary may prescribe.

(c) Every labor organization required to submit a report under this title shall make available the information required to be contained in such report to all of its members, and every such labor organization and its officers shall be under a duty enforceable at the suit of any member of such organization in any State court of competent jurisdiction or in the district court of the United States for the district in which such labor organization maintains its principal office, to permit such member for just cause to examine any books, records, and accounts necessary to verify such report. The court in such action may, in its discretion, in addition to any judgment awarded to the plaintiff or plaintiffs, allow a reasonable attorney's fee to be paid by the defendant, and costs of the action.

END OF APPENDIX 6

APPENDIX 7

REPORTING AND DISCLOSURE REQUIREMENTS FOR STATEWIDE OFFICERS, LOCAL OFFICERS, DIRECTORS, ASSISTANT DIRECTORS AND UNION STAFF (See Article XXII Section 3 of Bylaws)

From Labor Management Reporting and Disclosure Act

(29 U.S.C. 432)

SEC. 202. (a) Every officer of a labor organization and every employee of a labor organization (other than an employee performing exclusively clerical or custodial services) shall file with the Secretary a signed report listing and describing for his preceding fiscal year-

(1) any stock, bond, security, or other interest, legal or equitable, which he or his spouse or minor child directly or indirectly held in, and any income or any other benefit with monetary value (including reimbursed expenses) which he or his spouse or minor child derived directly or indirectly from, an employer whose employees such labor organization represents or is actively seeking to represent, except payments and other benefits received as a bona fide employee of such employer;

(2) any transaction in which he or his spouse or minor child engaged, directly or indirectly, involving any stock, bond, security, or loan to or from, or other legal or equitable interest in the business of an employer whose employees such labor organization represents or is actively seeking to represent;

(3) any stock, bond, security, or other interest, legal or equitable, which he or his spouse or minor child directly or indirectly held in, and any income or any other benefit with monetary value (including reimbursed expenses) which he or his spouse or minor child directly or indirectly derived from, any business a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with, the business of an employer whose employees such labor organization represents or is actively seeking to represent;

(4) any stock, bond, security, or other interest, legal or equitable, which he or his spouse or minor child directly or indirectly held in, and any income or any other benefit with monetary value (including reimbursed expenses) which he or his spouse or minor child directly or indirectly derived from, a business any part of which consists of buying from, or selling or leasing directly or indirectly to, or otherwise dealing with such labor organization;

(5) any direct or indirect business transaction or arrangement between him or his spouse or minor child and any employer whose employees his organization represents or is actively seeking to represent, except work performed and

payments and benefits received as a bona fide employee of such employer and except purchases and sales of goods or services in the regular course of business at prices generally available to any employee of such employer; and

(6) any payment of money or other thing of value (including reimbursed expenses) which he or his spouse or minor child received directly or indirectly from any employer or any person who acts as a labor relations consultant to an employer, except payments of the kinds referred to in section 302© of the Labor Management Relations Act, 1947, as amended.

(b) The provisions of paragraphs (1), (2), (3), (4), and (5) of subsection (a) shall not be construed to require any such officer or employee to report his bona fide investments in securities traded on a securities exchange registered as a national securities exchange under the Securities Exchange Act of 1934, in shares in an investment company registered under the Investment Company Act or in securities of a public utility holding company registered under the Public Utility Holding Company Act of 1935, or to report any income derived therefrom.

(c) Nothing contained in this section shall be construed to require any officer or employee of a labor organization to file a report under subsection (a) unless he or his spouse or minor child holds or has held an interest, has received income or any other benefit with monetary value or a loan, or has engaged in a transaction described therein.

END OF APPENDIX 7

ADMINISTRATIVE POLICIES AND PROCEDURES

**SEIU LOCAL 503,
OREGON PUBLIC EMPLOYEES UNION**



INDEX

<u>ARTICLE</u>		<u>PAGE</u>
I	HEADQUARTERS	1
II	BOARD OF DIRECTORS	1
III	BOARD COMMITTEE OPERATIONS	3
IV	LOCALS	12
V	GENERAL COUNCIL	13
VI	REIMBURSABLE EXPENSES	14
VII	PURCHASE AND RECORDING PURCHASES OF PERSONAL PROPERTY BY LOCALS	22
VIII	OTHER FISCAL MATTERS	22
IX	BARGAINING	24
X	DELEGATES TO DAS AND OUS BARGAINING CONFERENCES	26
XI	INDIVIDUAL EMPLOYEE REPRESENTATION AND ARBITRATION SCREENING	27
XII	UNFAIR LIST	29
XIII	POLICY FOR ADMISSION OF WORKERS INTO THE UNION	30
XIV	AFFIRMATIVE ACTION AND EQUAL OPPORTUNITY	31
XV	STAFF	31
XVI	HEADQUARTERS RECORDS	32
XVII	USE OF UNION FACILITIES	35
XVIII	STUDENT FINANCIAL ASSISTANCE AWARDS	35
XIX	POLITICAL CANDIDATES	37
XX	SEIU OREGON STATE COUNCIL AND LABOR COUNCILS	37
XXI	POLICY FOR USE OF STRIKE AND JOB PROTECTION FUNDS	38
XXII	INVESTMENT GUIDELINES	40
XXIII	OATH OF OFFICE	41
XXIV	MEMBER LEADERSHIP DEVELOPMENT	41
XXV	COMMUNICATION GUIDELINES	42
XXVI	TELEPHONIC MEETINGS	42

SEIU LOCAL 503
OREGON PUBLIC EMPLOYEES UNION

ADMINISTRATIVE POLICIES AND PROCEDURES (AP&P)

PURPOSE

This document sets out policies and procedures relating to administration of activities of the Union. It is intended to supplement, explain, or implement the Union Bylaws and resolutions adopted by General Councils. The Bylaws and General Council resolutions take precedence. Upon adoption of this document, its provisions shall supersede and replace all other provisions, on the same subject, which may have been adopted by earlier Boards. Copies shall be distributed to Board members, Assistant Directors, Committee Chairpersons, and Local Presidents.

ARTICLE I (AP&P)
HEADQUARTERS

The principal office of the Union, hereinafter referred to as "Headquarters," is located in Salem, Oregon (*C&B #5 2010*)

ARTICLE II (AP&P)
BOARD OF DIRECTORS

Section 1 Meeting Scheduling The second Saturday of every other month is reserved for Union statewide Board meetings. The scheduling of dates, times, and places of Board meetings is the prerogative of the President who presides at Board meetings. Normally, Board meetings start at 9:00 a.m. so that individuals not authorized for night-before arrival will have sufficient travel time. Special circumstances could require a different starting time.

Section 2 Agenda The President, with the assistance of the Executive Committee and the Executive Director, schedules items on the agenda of Board meetings. A copy of the agenda shall be sent to all members of the Board, Assistant Directors, and Committee Chairpersons no later than ten (10) days before each meeting. The Board, Committee Chairpersons, and Executive Director shall prepare and distribute outlines and background details of issues that will be presented for Board consideration and action ten (10) days prior to the Board meeting. When this cannot be done, every effort will be made to communicate this information to the Board members prior to the meeting.

Section 3. The usual order of business of the Board in regular and special meetings shall be as follows:

- Call to Order
- Roll Call
- Reading of Minutes
- Communications
- Reports of Officers & Directors

Reports of Special Committees
Open Discussion
Unfinished Business
New Business
(C&B #5 2010)

Section 4 Who May Attend Board meetings shall be open to attendance by any Union member Locals are encouraged to pay for expenses of their members to attend Board meetings On extraordinary occasions, the Board by a two-thirds (2/3) vote may direct that a specific matter be considered in executive session Such extraordinary occasions include consideration of the employment of a staff member, the dismissal of, or to hear complaints or charges brought against an officer, deliberations with persons designated to carry on labor negotiations, consultation with counsel concerning the legal rights and duties of the Union with regard to current litigation or litigation likely to be filed, or to review and evaluate criteria and policy directives adopted by the Board All executive sessions will have approved recorded minutes on file at Headquarters

Section 5 Voting on Expenditures and Union Policy All Board votes on Union policy or unusual expenditure items shall be by voice vote or show of hands and shall be duly recorded

Section 6 Voting on Political Items Based on recommendations and information from Citizen Action for Political Education (CAPE) or other appropriate sources, the Board may vote to endorse or take no position on candidates for statewide elective offices and the State Legislature Also, based on recommendations and information from CAPE or other appropriate sources, the Board may vote to endorse, oppose, or take no position on statewide ballot measures or political issues Any such action by the Board on political candidates, ballot measures, or political issues shall require a roll call vote and approval by a two-thirds (2/3) majority of those voting The position taken by the Board shall be communicated to the CAPE Council and the general membership

Section 7 Minutes Detailed minutes of Board meetings shall be taken and transcribed by a recording secretary The Secretary-Treasurer or his/her designee shall review and certify the completed minutes and direct their reproduction Copies shall be mailed to Board members, Assistant Directors, and Committee Chairpersons, and, upon request, to Local Presidents One (1) copy shall be kept permanently at Headquarters and shall be available for inspection by any Union member Executive Session minutes shall have a restricted distribution determined by the President and shall be maintained in a secured location at Headquarters

Section 8 Publicizing Board Motions Copies of the minutes of the Board meetings shall be mailed as soon as possible to Board members, Assistant Directors, Standing and Special Committee Chairpersons, and Local Presidents

Section 9 Plaques for Statewide Officers A plaque is awarded to each Statewide Officer at the time he/she leaves that position

ARTICLE III (AP&P) BOARD COMMITTEE OPERATIONS

Section 1 Meeting Schedules Committees of the Board shall meet at such intervals and at such times and places as the Committee Chairpersons feel necessary for performing the duties of their committees. However, meetings involving more than ordinary expense shall require advance Board authorization. Committee Chairpersons are encouraged to minimize the number of meetings by developing a full agenda and by using mail, e-mail and telephone communications.

Section 2 Coordination of Meeting Dates The President shall arrange for the coordination of dates used for meetings by the various Board committees. The President shall designate "committee weekends". Committee Chairpersons will endeavor to coordinate meetings with other committees to allow for sharing of rides and lodging.

Section 3 Advisory Members Persons serving as advisory members on a committee shall have the right to vote on all issues coming before the committee.

Section 4 Committee Publicity Space shall be provided in the Union newspaper for reporting the highlights of committee activities.

Section 5 Expense Review Committee Chairpersons should review expense claim forms of committee members prior to submission. When expense vouchers are identified by date, committee activity, and are signed by the Committee Chairperson, they will be processed for payment. If not, they will be returned to the person completing the expense voucher with proper notation for completion.

Section 6 Reports to the Board Committee Chairpersons shall make all reports to the Board in written form, unless invited by the President to appear in person. Oral committee reports will be scheduled so that committee representatives can leave home and return on the same day.

Section 7 Executive Committee The Executive Committee meets on the call of the President. Minutes shall be taken at each meeting. These minutes shall be included in the next Board meeting packets and an oral report shall be presented at that Board meeting. The Secretary-Treasurer or his/her designee shall review and certify the completed minutes.

Section 8 Committees Within the Board structure there are two (2) types of committees: Standing and Special. The Board also has Special Councils.

- (a) Standing committees of the Board are: Member Benefits, Staff Screening, Civil & Human Rights, Member/Local Union Organizing, Hardship, Committee to Protect Injured Workers (CPIW), Pension and Thrift, and the Fight Contracting Out Committee (*C&B =6 2008, C&B =5 2010*)

These committees are established to respond to special interests of the Union, i.e., overseeing member benefits/insurance programs, filling staff positions, retirement benefits, monitoring equal employment opportunities, designing a structure to organize non-represented workers, providing a structure for hardship assistance, overseeing

leadership training, monitoring and educating on workplace health/safety/rights of injured workers, setting policy for the staff pension plan, and to develop expertise in fighting contracting out efforts

Any committee with a corresponding Union conference (i.e., Civil & Human Rights Conference) will be responsible for recruiting participants to attend

1 MEMBER BENEFITS COMMITTEE

a) The committee shall make recommendations to the Board for action in the following areas

- 1 Membership benefit programs,
- 2 Policy positions on insurance programs in general, and
- 3 Maintenance, betterment and promotion of workers' compensation benefits

b) No advertising through the Union newspaper or other Union media, paid or otherwise, that implies a discount to Union members or others shall be accepted for publication unless the matter has been approved by the Member Benefits Committee or other appropriate committee and the Board

2 STAFF SCREENING COMMITTEE

a) For program staff positions, the Committee shall

- 1 Review all applications,
- 2 Contact all applicants chosen to be interviewed,
- 3 Conduct all initial interviews, and
- 4 Make recommendations to the Executive Director of person(s) to be hired. When possible, the committee shall recommend two (2) people at least for each available position. The committee shall try to maintain a list of eligible applicants for any future openings

b) For support staff positions, the Committee shall

- 1 Interview finalists submitted by the Department Supervisor, for all support staff position,
- 2 Screen applicants for Union values, and
- 3 Make recommendations to the Department Supervisor of person(s) to be hired. When possible, the committee shall encourage hiring of Union members

c) The committee shall, for management staff positions, with the exception of the Executive Director and Assistant Executive Director positions

- 1 Announce all openings
- 2 After initial screening by the Executive Director, the staff screening committee shall be represented on a special committee to interview all applicants submitted by the Executive Director
- 3 Make recommendations to the Executive Director, in order of preference, of the person(s) to be hired

d) Assistant Executive Director applicants shall be screened and interviewed by a special committee comprised of the Executive Director and members of the Board of Directors, appointed by the President. The final hiring decision will be made by the Executive Director.

3 CIVIL AND HUMAN RIGHTS COMMITTEE

a) The Civil and Human Rights Committee will make recommendations to the Board for action in the following areas

- 1 Creating public and Union awareness of the Union's commitment to Equal Employment Opportunity (EEO) policies,
- 2 Developing and providing EEO training programs, and
- 3 Promoting of Civil Rights in all areas that affect members

b) The Civil and Human Rights Committee will oversee the Latino Caucus which promotes the leadership and organization of Latina/o members

c) The Civil and Human Rights Committee will oversee the Lavender Caucus which promotes the leadership of Gay, Lesbian, Bisexual, and Transgendered members

d) The Civil and Human Rights Committee will oversee the African/American (AFRAM) Caucus which is charged with meeting the following organizational goals (*ESP* #7 1998)

- 1 Build a strong power base for fighting unique issues of cultural diversity,
- 2 Develop unity and a sense of solidarity within the membership of African American descent to build power within the Union as a whole,
- 3 Develop a systematic forum to identify and develop, train and organize African American leadership,
- 4 Draw on the perspective and experience of African American members to expand our awareness of multi-cultural and multi-racial issues, and
- 5 Work in partnership with the SEIU International

AFRAM caucus

4 MEMBER/LOCAL UNION ORGANIZING COMMITTEE (MOC)

a) The Union will maintain a Member/Local Union Organizing Committee to design and support the structure necessary for members to work on behalf of the Union for periods of up to one (1) year while on leave or release from their current employment. The Board of Directors will fund a regularly scheduled training session for MOC/LUOC members to be done by organizing staff, Member/Local Union Organizers (on paid time) who have had the training previously, and SEIU resources when and where available (*MA #8 1990, C&B #3 2000*)

b) This committee will include Union leadership as well as rank-and-file members (*MA #8 1990*)

c) This committee will develop a statement of purpose, a timetable, and a proposed funding base necessary for the operation of an ongoing Member/Local Union Organizing Committee through which Local members can work to organize non-represented people in the labor force (*MA #8 1990*)

d) This committee will have the following goals

- 1 To recommend Local union organizing goals, subject to Board approval,
- 2 To develop a strategic organizing plan for the Union,
- 3 To assist in creating member organizing committees so that the Union has trained volunteer organizers to support its organizing,
- 4 To work with members to set up organizing teams that can be called upon to help in external organizing activities around the state. Team members will have at least one organizing opportunity per quarter to take part in external organizing activities and training,
- 5 To maintain a current list of trained members, schedule trainings, and a record of members' participation be presented to the Board quarterly, and
- 6 To evaluate and revise an organizing plan on a regular basis (*MA #16 1992*)

5 HARDSHIP COMMITTEE

a) A Statewide Hardship Committee is maintained for the purpose of setting standards and criteria for Local Hardship Committees for providing limited and short-term assistance to members

b) The Statewide Hardship Committee will consist of interested members appointed by the President and approved by the Board of Directors

c) The Union President will appoint one (1) member of the Board of Directors to serve as liaison between the Board and the Committee. This will be a nonvoting position.

d) Local Hardship Committees. The Local Hardship Committees will

1. Be composed of representatives within the Local,
2. Follow criteria set up by the Statewide Hardship Committee, and
3. Give direction to Local members for raising funds and finding other resources.

6 COMMITTEE TO PROTECT INJURED WORKERS (CPIW) *(C&B #6 1998)*

a) The committee is formed to organize, educate and mobilize around the issues of workers' compensation, insurance, safety and health.

b) The committee shall develop a packet for injured workers to be distributed to new workers and made available to members. This information shall also be added to new orientation packets. *(ER #7 2004)*

c) The committee shall work legislatively for positive change in these areas.

d) The committee shall investigate, advise, consult with other unions and affiliates and other interested parties, and educate Union members and the public with regard to workplace health, safety, and the rights of injured workers.

7 PENSION AND THRIFT COMMITTEE

a) The Union Retirement Plan and Trust Agreement is a defined contribution 401K plan for Union staff members, which includes plan implementation and investment of pension funds.

1. Oversight for the plan is provided by the Plan Administrator, the Union's Executive Director.
2. There will be six (6) Trustees, two (2) members from the Union's Board of Directors, and four (4) staff representatives who are Plan participants: two (2) administrative staff members and two (2) bargaining unit staff members.

8 FIGHT CONTRACTING OUT COMMITTEE

- a) This committee is charged with development of expertise in how to fight contracting out, and acting as a rapid response team to assist in fighting any contracting out efforts. The committee will
 - 1 Produce a leaders' "toolkit" available to all Local officers,
 - 2 Actively develop a campaign to spread our message to public officials through their publications and meetings, lobby days, and whatever means necessary that privatization is not acceptable,
 - 3 Cultivate research on privatization and make said research available to all members as well as legislators,
 - 4 Advocate for state and Local legislation that would raise public accountability standards,
 - 5 Advocate for political and legislative action that promotes policies which discourage privatization,
 - 6 Aggressively defend public services that are under attack, including activating an "early warning system" to spread the word about important contracts up for bid or renewal and widely publicizing contracting problems,
 - 7 Develop training for activists, Local leaders, and union staff about this issue including, but not limited to, feasibility training, warning signs, motivating members, and waging a campaign against privatization,
 - 8 Foster alliances with others in our state and nation who share our concern about defending and improving public services
 - 9 Include and increase protections in all collective bargaining agreements,
 - 10 Explore and encourage opportunities for organizing workers who provide similar services in the public, private, and non-profit sectors so that private companies cannot compete on the basis of low wages and benefits,
 - 11 Develop a website linked to the SEIU 503 website, with information about how to fight contracting out, including links and information about what other states have done, and
 - 12 Identify where contracting out has failed by costing more money or providing poor quality services
- b) Regional duties may include, as determined by the Board of Directors
 - 1 Providing a list of activists willing to help SEIU members in Oregon and nationally,
 - 2 Developing action plans with feedback of what worked and what didn't,

- 3 Provide training and present information to members via meetings or developing web accessed tools such as a template for gathering information and setting up an action plan,
- 4 Developing a resource directory including contacts, and

c) The Committee's activists shall develop expertise in the wider issues of job losses through outsourcing and advise the Board of Directors on issues that affect working people outside of our union

(b) Special Councils The special councils of the Board are Local Government, Women's, Higher Education, Private Non-Profit and Nursing Home These councils are established to further communication and the principles of unionism within these groups Any council with a corresponding SEIU International or Union conference (i e , Women's Conference) will be responsible for recruiting participants to attend

1 LOCAL GOVERNMENT COUNCIL

- a) The council shall be comprised of representatives from every Local-government Local represented by the Union
- b) The council shall oversee the overall Local government organizing plan and the coordination of Local government activities, including, but not limited to
 - An annual Local government conference,
 - A strategy for coordinated bargaining for Local government units,
 - Coordinated training, and
 - An overall Local government political strategy
- c) All Local government units shall select a representative(s) to participate in conferences and other activities designed to build the union's plan for Local government units
- d) The council shall meet at least two (2) times a year
(C&B =3A 1981, C&B =8 1987, UO =11 2002)

2 WOMEN'S COUNCIL

- a) The council shall be comprised of members and a chairperson who are appointed by the Union President, subject to approval by the Board of Directors
- b) The council shall
 - 1 Plan and execute the Women's Conference, to be held biennially in odd-numbered years,

- 2 Institute information, research, and lobbying programs that address issues of particular interest to the women of the Union,
- 3 Create an active network of activities that involve the women of the Union,
- 4 Organize a women's caucus, and
- 5 Serve as Dependent Care Committee, with the responsibilities of ensuring that quality dependent care be available to all members at all major Union events and promoting worthy wage legislation at the state and federal levels
(*EB #3A 1990, C&B #6 2008*))

3 HIGHER EDUCATION COUNCIL

- a) The Higher Education Council shall consist of at least one elected member from each of the seven campuses in the Oregon University System. A chairperson will be selected by the members of the council. This Council will meet on a regular basis to develop strategy, discuss issues to be resolved or put forward during negotiations with OUS, develop system-wide campaign actions in concert with the Bargaining Team, to enable and develop coalition building on each campus, and (in response to input from the Bargaining Team) create and publish flyers, press announcements, website announcements, and bulletins for distribution on campus. (*ER #1 2000*)
- b) This Council will also meet to build solidarity throughout the system. Its primary mission will be to organize and motivate members on each campus to act as one.
- c) In addition, the Council will be advised by the Higher Ed Coordinator organizer and will meet and confer with the Higher Ed Bargaining team regularly during the contract campaign to enable direct communication and report on the progress of the campaign on the individual campuses.
- d) The Council could be asked to develop agendas for conferences to better inform and motivate membership, especially during contract campaigns.

4 PRIVATE NON-PROFIT COUNCIL

- a) The duly elected Director of the private non-profit employment sector shall serve as an automatic member of the Private Non-Profit Council.
- b) Each private non-profit agency may have at least one member serve on the Private Non-Profit Council.
(*ER #5 2008*)

5 NURSING HOME COUNCIL

- a) The President and Vice-President of each Nursing Home Local or designee shall sit on the Nursing Homes Council
- b) The Nursing Homes Council shall have no governmental or fiduciary functions
- c) The costs of the Council in excess of the amount approved by the Board of Directors shall be proportionally charged to the Nursing Home Local's accounts
(*ER =7 2008, C&B =5 2010*)

(c) Special Committees A Special Committee is a committee established by General Council or the Board for a specific purpose on a temporary basis, with its duration determined by the Board Unless otherwise provided for in the Bylaws or AP&P, all committees shall consist of members and a chairperson who are appointed by the Union President, subject to approval by the Board of Directors

1 OPERATIONAL AUDIT COMMITTEE

The Operational Audit Committee reports to the Board and is charged to conduct operational audits, review and other investigations as the Board deems necessary to assure the Board that resources and assets are used efficiently and effectively to realize the goals of the Local The Board shall allocate funding sufficient to carry out the charge of this committee (*UO =3 2002*)

Section 9 Each Committee shall keep minutes of transactions at each meeting, and these minutes shall be included in the Board packets (*C&B =5 2010*)

Section 10 The chairperson or a designated representative from Standing or Special Committees may present motions to the Board (*C&B =5 2010*)

Section 11 The Board shall maintain Community Action Centers throughout the State for the purpose of holding community-based, cross-Local meetings to undertake political action, solidarity activities, strategic brainstorming and planning, and to share issues and concerns from Locals in the area Meetings will be scheduled as needed within each Center, based on the level of interest in community based projects The following list will serve as a starting place for the Board's deliberations on where such Centers will be established

- Astoria/Tillamook
- Newport/Lincoln City
- Coos Bay/South Coast
- Salem

- Corvallis/Albany
- Eugene
- Roseburg
- Grants Pass/Medford
- Klamath Falls
- The Dalles/Hood River
- Portland Area
- Pendleton/LaGrande
- Bend
- Baker City/Ontario

Reasonable and routine operating expenses for these Community Action Centers, such as food, mileage and room rentals, shall be paid by the General Fund and can be signed for by the staff organizer assigned to that Center. Funding for special projects beyond reasonable and routine expenses shall be requested through the Finance Committee according to its established practices.

ARTICLE IV (AP&P) LOCALS

Section 1 Copies of Staff Job Descriptions and Table of Organization Upon request, Headquarters shall supply Local presidents with copies of staff personnel job descriptions and the staff table of organization.

Section 2 Local Organizing Plans All Locals, working with their organizers, shall submit an annual Local organizing plan that

- Identifies Local and worksite issues and lays out plans to address them,
- Integrates workplace organizing into the overall Union's strategic plan,
- Sets goals for leadership recruitment/development, membership percentages, CAPE contributors, etc., and
- Determines a calendar and timetable for implementing the plan.

Officers and staff of the union are directed to focus close attention on the union's internal organizing and leadership development plans, without compromising the Local's political and external organizing programs.

Section 3 If a Local becomes inactive, all unobligated monies of the Local shall revert to the treasury of the Union. If an inactive Local has not been reactivated within two (2) years, said monies shall be placed in the General Fund account of the Union. Unobligated monies of a Local whose charter has been revoked shall be placed in the General Fund account of the Union upon receipt. (*C&B #5 2010*)

Section 4 To the extent a Local is formed through an affiliation, the affiliation agreement shall provide, in addition to other necessary provisions, that upon payment of Union dues and acceptance of the Union Bylaws and other obligations of Union membership by the various members of the organization qualifying for active membership in the Union, such members shall

be entitled to all the rights of, and shall be, active members of the Union. The organization shall be entitled to all the rights and subject to all the obligations of, and shall be a regular Local of the Union.

Section 5 The dues paid by Union members are Union monies whether for the use specifically of the Union or of the Local. If a Local chooses to affiliate with any other labor organization or decertifies the Union, the funds in its treasury that were derived from such Union dues shall belong solely to the Union for its use and shall be turned over to the Union by such Local upon affiliation of the Local with the other labor organization or upon decertification. (*C&B #5 2010*)

Section 6 Worksite Leaders Every workplace represented by the Union shall have a worksite leader. Each worksite leader shall receive membership applications and distribute information of interest to their coworkers.

Headquarters shall keep a statewide master list of all worksite leaders. Each Local shall keep a list of worksite leaders in the Local. These lists shall be made available to Committee Chairpersons, Union Stewards, other officers, or staff persons of the Union upon request.

ARTICLE V (AP&P) GENERAL COUNCIL

Section 1 Existing Policy Resolutions Document Not later than four (4) months after General Council, the Resolutions Review Committee shall compile an Existing Policy Resolutions document, indicating current status. Copies of each new document and statement shall be distributed to Board members, Assistant Directors, Committee Chairpersons, and Local Presidents. Each General Council year, an updated edition of this document shall be prepared by the Resolutions Review Committee not later than ninety (90) days prior to Council and shall be distributed to all General Council delegates.

Section 2 Deletion and Prioritization of Older Resolutions Effective four (4) months after General Council, all existing policy resolutions more than four (4) years old are deleted. A resolution adopted at General Council will take precedence over all preceding adopted resolutions dealing with the same topic. The Resolutions Review Committee shall compile a list of deleted resolutions and forward copies to all Board members and Board Committee Chairpersons.

Section 3 Union Newspaper The Union newspaper shall publish the resolution timelines, the method of moving resolutions through the process, and a sample format for resolutions in its first issue in the calendar year in the year of General Council. Immediately following General Council the adopted constitutional changes will be printed verbatim in the Union newspaper for membership information. (*OU #7 1998*)

Section 4 Resolution Authoring Each General Council resolution submitted will show the name of the author. His/her name will be encoded on the resolution when it is processed at Headquarters.

Section 5 Resolution Heading The heading of each General Council resolution shall contain the name of the sponsoring group and its location

Section 6 Dated Resolutions The Resolutions Review Committee shall review the Existing Policy Resolutions for resolutions that have gone beyond stated implementation dates and then refer these resolutions to the Board for action

Section 7 General Council Committee Responsibilities The General Council committees shall have one agenda day to consider resolutions assigned to them These committees are given the responsibility and authority to modify, combine, and subsequently present resolutions to the General Council However, any original resolution may be called to the floor by a majority vote of the General Council

Section 8 Expense Reimbursement for Certain Committees Meals, lodging, and travel expenses for the General Council Pages and for the members of the Credentials Committee are reimbursable by the Union

Section 9 Smoking Ban Cigarette, cigar, and pipe smoking are banned on the General Council floor and in the committee meeting rooms

Section 10 Alcoholic Beverages Union funds shall not be used for the purchase of alcoholic beverages, mix, or related items

Section 11 Past Presidents Past Presidents who are not eligible to serve as permanent delegates are permanent honored guests at General Council

Section 12 Dates The dates of General Council shall be set in a manner attempting to minimize conflict with religious observances (*UO #6 1996*)

Section 13 General Council Delegate Responsibilities Attendance at all sessions of the General Council is essential Delegates appointed to General Council committees are expected to attend all scheduled meetings of their committee Delegates representing Locals that are sponsoring resolutions are responsible for actively working for adoption of those resolutions, including appearing before General Council working committees in support of his/her Local resolution

Delegates are charged with a responsibility to report back to their membership constituency an accounting of the Council decisions and events This is a critical function of the General Council body in communication and education of its members in the governance of the Union

ARTICLE VI (AP&P) REIMBURSABLE EXPENSES

Section 1 General Expenses that are incurred for carrying out Union business are reimbursable Cooperation is needed to achieve the goals of the Union There may be times when lodging regulations must give way to travel and vice versa Alternate modes of travel will

be considered for cost-effectiveness. The overriding consideration is total cost to the Union. All travel arrangements will be made through Union Headquarters. Special conditions will be approved in advance by the Union Secretary-Treasurer or his/her designee.

Section 2 Hardship Advance Hardship will be self-defined but will be based on financial need, not personal convenience. Individuals requesting an advance must contact the authorized signers (Local President or Committee Chairperson) to approve payments. An expense form must be completed and signed by the authorized signer(s), then submitted to Accounting at Headquarters. The check will be issued within three (3) days of receipt of the request for an advance.

- (a) Cash advances will be limited to mileage
- (b) Expense forms covering the advance/event are to be submitted within two (2) weeks following the event justifying the payment
- (c) If expense forms covering the event are not received by Headquarters within two (2) weeks after the event, the Accounting office will bill the individual for the amount of the advance
- (d) If the individual does not respond within ten (10) days, the Accounting office will bill the appropriate account (Local or Committee) with notice to the signer(s) who authorized the advance
- (e) If the individual has an outstanding unpaid advance, no further advance requests will be honored until the initial advance has been resolved

Section 3 Types of Reimbursable Expenses Reimbursable expenses are those for meals, lodging, travel, telephone calls, postage, and other Union business incidentals.

Section 4 Alcoholic Beverage Expenses Expenses for alcoholic beverages are not reimbursable.

Section 5 Eligible Persons The persons eligible for expense reimbursement are Board members, Assistant Directors, Local Officers, committee members, General Council delegates, active Past Presidents, staff and other Union members on authorized Union business.

Section 6 Individual Receipts Receipts are required for lodging, meals, and miscellaneous expenses.

Section 7 Travel Expense Claim Forms Expense claims through the end of each month are due by the 15th of the following month. Names of guests and dates shall be listed on such forms when rides are shared or when meals are paid for others who are eligible for reimbursement.

- (a) Claim forms must be submitted within ninety (90) days
- (b) Claims over ninety (90) days will be denied, but appeal may be made to Union Finance Committee if denial represents undue hardship

Section 8 Meal Allowances Reimbursement for meals shall be for actual expenses up to a maximum of \$7.88 for breakfast, \$7.88 for lunch, and \$15.75 for dinner (plus up to 20% gratuity not to exceed \$9.46 for breakfast, \$9.46 for lunch and \$18.90 for dinner) (UO #1 2008). Receipts

must be submitted for substantiation before reimbursement is made. Meal expenses may be carried from one (1) consecutive day to the next if all the expense vouchers are from the same account (e.g., cannot mix General Fund or Local accounts). Meal reimbursement for out-of-state meetings may be made at higher rates if circumstances have required higher expenses. However, this will be limited to two (2) times the amount for in-state travel. No reimbursement for meals will be granted for those meals that are provided by the function unless there is a dietary reason that cannot be accommodated. (MA #5 2002)

Section 9 Guidelines for Lodging Arrangements, Reimbursements, and Allowances

(a) All lodging arrangements will be made through Union Headquarters except for special conditions approved in advance by the Union Secretary-Treasurer or his/her designee. The Union allows one-half (1/2) the double room rate for each individual who is authorized for lodging and occupies a room. However, a member may request a single room if either the member pays at checkout time the difference between one-half (1/2) the double room rate and the single room rate, or if a Local has given prior approval to the member that the Local will pay the difference upon being billed by the member or Union Headquarters. Members traveling with family/partner will be responsible for the difference in cost between the single room rate and a family accommodation rate. Persons who do not request special considerations, yet end up in single accommodations because there was no other person to share a room, shall not be charged for the extra cost. Headquarters will annually compile a list of preferred hotels and motels which all members are requested to use when staying in an area unless prior approval is received from a Statewide Officer.

Persons calling meetings are cautioned that all Union dues-funded budgets (whether they are Union General Fund or Local Central Ledger accounts) are the responsibility of the Union and are to be utilized according to the Union's governing documents.

(b) Meetings Held in Salem

1 Arrangements are to be made through Headquarters

- a) The person calling the meeting is to contact Union Headquarters and give dates and names of attendees.
- b) Unless otherwise specified, Union Headquarters will pair up participants in shared rooms.
- c) Persons requesting single rooms or family accommodation are to have reservations made by Union Headquarters.
- d) Persons requesting special accommodations because of non-member authorized guests in room or personal, non-reimbursable expenses, will be responsible for payment of the extra cost either at the time of checkout or upon receipt of a billing from Union Headquarters. Payment is due upon receipt of billing. If payment is not received within 90 days, the amount due will be deducted from that person's next expense reimbursement request. No

further special accommodations will be honored until the outstanding billing has been resolved

- 2 There may be times when more than one Union group is meeting at the same time Whenever possible room share will be attempted

(c) Meetings Held Outside Salem

- 1 Persons planning meetings away from Salem are requested to keep costs to the Union at a minimum Regardless of the costs at the hotel/motel chosen, the payment allowance/reimbursement is still one-half (1/2) the shared room rate at that hotel/motel
- 2 The person calling the meeting should first contact Union Headquarters to see if special arrangements have been made at a motel in the vicinity the meeting is to be held Group discount rates should be explored and costs compared whenever possible
- 3 Leaders should coordinate lodging, pairing participants in shared rooms whenever possible

Section 10 Mileage Allowances Reimbursement for travel expense shall be 6¢ less than the federal IRS rate and Union reimbursement rates for rideshare/carpool be raised to 6¢ above the single rider rate per mile and raised/lowered automatically to maintain the 6¢ difference per mile any time single rider rates are changed Further, this rideshare/carpool increased rate is not to be used to lower the single rider/driver rate or the cause of such a change based on the actual and reported beginning and ending odometer readings of the vehicle used (*UO #3 2002, UO #14, 2004*)

Section 11 Ride Sharing Ride sharing is strongly encouraged whenever possible for all Union officials and members while on Union business

Section 12 Limits on Board member visits to Locals Expense reimbursement by the Union will be made to a maximum of one Board member per Local meeting

Section 13 Special Conditions The dinner meal and lodging will be allowed the night before a meeting only if auto travel to the meeting exceeds seventy-five (75) miles one way Lunch will be allowed the day of an evening meeting, providing that arriving timely for the evening meeting necessitates leaving prior to the normal lunch hour of 12 noon

Lodging will be allowed the night after a meeting only if travel time after adjournment of the meeting would make arrival at home after 9 p m including one (1) hour for dinner en route Dinner will be allowed on the night of a meeting if travel is necessary after the normal dinner hour of 6 p m

Breakfast will be allowed after an overnight stay away from home, or prior to a morning meeting necessitating travel before 6 a m in order to arrive timely Lunch will be allowed on the day of return home if arrival time exclusive of eating would be after 1 p m and that departure is no later than 8 a m

When it is necessary to include a homecare client while a union activist is participating in authorized union activities, the union will reimburse for actual expenses associated with said client's in-state travel for mileage, food and lodging (not to exceed \$5,000 annually) (UO #2 2002)

Additional exceptions may be made for such unusual circumstances as illness or adverse weather conditions

Section 14 Expense Schedule Revisions The Board of Directors is authorized to change the Union expense schedules

Section 15 Board Authorization The Board of Directors may provide for the payment of travel and other necessary expenses of the Board, members of Standing and Special Committees, and other members authorized by the Board to represent the Union

Section 16 Payment to Members for Wages and Expenses

(a) **Payment for Wages and Expenses While Bargaining and All Other Wages** Payment for wages and expenses will be initially paid by Headquarters, weekly for expenses, and monthly for wages, directly to the bargaining unit member

(b) **Wages** Those individuals authorized to receive wages while attending authorized events held during an individual's normal working time (such as those selected to represent Locals at the coalition tables, at the central table, and delegates to bargaining conferences and General Council) will be processed as follows

1 For all practical and legal purposes these members will be considered as employees of the Union while at such activities

2 Wages will be paid based on the individual's normal hourly rate as stated on his/her payroll check stub or at the stated hourly rate based on the monthly salary amount plus the following

- a) Pro rata of the retirement contributions lost,
- b) Pro rata of vacation lost, and
- c) Pro rata of sick leave lost

3 Withholding based on gross Union payment will take place for federal, state, and Local taxes, FICA and SAIF

4 Additional payroll expense costs will be billed to the Locals for employer costs

- a) Federal Unemployment Tax,
- b) State Unemployment Tax,
- c) FICA, and
- d) SAIF

5 Withholding forms (W4s) and the Individual Wage Cost Calculation Worksheet and Employee Agreement must be completed and submitted by each authorized individual receiving wages

6 Time cards must be completed for bargaining, authorized by the respective Central or Coalition Chairperson, and staff spokesperson All other time cards must be signed by one of the authorized signers on the Central Ledger

(c) Leave Time Reimbursement Members who must travel a minimum of three (3) hours each way to conduct Union business and use leave time in excess of four (4) hours per month to do this traveling, may be reimbursed for the time spent en route at their individual rate of pay, not to exceed eight (8) hours reimbursement per month, with prior approval from the governing body responsible for payment (*MA = 11 1985*)

Members who must use in excess of four (4) hours per month leave time to conduct Union business during their normal working hours may be reimbursed at their individual rate of pay for such time over four (4) hours, not to exceed eight (8) hours reimbursed per month, with prior approval from the governing body responsible for payment

(d) Expenses Expenses for bargaining will be paid each week on Monday Approved claims submitted by 5 00 p m on Friday will be mailed out no later than Monday of the following week

Expenses will be reimbursed to bargaining representatives based on the stated Union policies These are on the back of the Expense Claim Form and in previous Sections of this Article

Monthly statements will be prepared at Headquarters for all authorized expenses and wages for approved Union business that are received by approximately the 25th of each month It is the responsibility of the Local to pay the statement no later than the 20th of the following month (This is necessary because of the cash flow problem this will present to Headquarters)

(e) Locals shall authorize Union Headquarters to pay their assessment by signatures on an expense authorization form by the 20th of the month

Section 17 Limitations No expenses will be reimbursed for other than authorized Union business The Union will not pay for services and/or materials from vendors on the SEIU or AFL-CIO unfair list Members will not be reimbursed for services or materials purchased from any vendor appearing on the SEIU or AFL-CIO unfair list

Section 18 Appeals Persons dissatisfied with action taken by the Secretary-Treasurer on a Travel Expense Claim may appeal their case to the Union Finance Committee Action taken on the case by the Union Finance Committee may be appealed to the Board

Section 19 Responsibility for Expenses Directors and Assistant Directors' expenses for Board, statewide committees, and all other committees and conferences will be charged to Board expense or the respective committee and paid from the General Fund The Locals may pay the expenses for their representatives to Board meetings and any other reimbursable expense for Local business Exceptions may be made when prior written approval is made by the body expected to bear the expense

Section 20 Interstate Travel and Conferences

- (a) All interstate travel made by members, Local Officers, Statewide Officers, Directors, or Assistant Directors in the pursuance of Union business shall be approved by the Board of Directors, if time permits, or the Executive Committee, prior to any arrangements being made. All travel arrangements shall be made through Union Headquarters.
- (b) All conferences and conventions at which Union members will represent the Union must be approved by the Board of Directors, if time permits, or the Executive Committee. Criteria for approving all conferences and conventions shall be based upon
- 1 The value to the Union,
 - 2 The value of Union representation at the event, and
 - 3 Cost to the Union
- (c) Requests for attendance at all trainings (in-state) where costs exceed \$500 may be submitted to the Board. The Board's review process will take into account the activism of the participant, how that training will be used on behalf of our members, and how it will provide for equal opportunity between members and Locals. Said trainings shall be paid from the General Fund. All trainings where costs exceed \$1000 per person, may not be approved by individual Locals, but must be approved by the Board. The Board will incorporate this process for approval of attendance at PERC/LERC trainings and summer school. These trainings shall also be paid from the General Fund. (*ER =3 2006*)
- (d) Members must attend the entire function unless there are parts deemed optional, and members must present an oral report to whomever funded them (Local and/or a board or regional meeting) within 60 days of their return at the next regularly scheduled meeting, unless the presiding officer permits an extension. (*MA =5 2002*)
- (e) Members will sign a statement acknowledging this responsibility and their responsibility to attend pertinent sessions of the training or conference. This statement will include notification of the consequences for non-attendance. (*MA =6 2006*)

SEIU LOCAL 503, OPEU
INDIVIDUAL WAGE COST CALCULATION WORKSHEET
AND EMPLOYEE AGREEMENT

MONTHLY SALARY \$ _____ NAME _____
PAID BY EMPLOYER
LOCAL _____
DATE _____

EMPLOYEE COSTS

BASE HOURLY RATE	1	_____
RETIREMENT (* x line 1)	2	_____
VACATION (** x line 1)	3	_____
SICK LEAVE (* x line 1)	4	_____

TOTAL HOURLY EMPLOYEE RATE (add lines 1, 2, 3, 4) 5 _____

EMPLOYER COSTS

FED UNEMPLOYMENT (8% x line 5)	6	_____
STATE UNEMPLOYMENT (2 4% x line 5)	7	_____
FICA (6 2% x line 5)	8	_____
SAIF (0 24% x line 5)	9	_____
MEDICARE (1 45% x line 5)	10	_____

TOTAL HOURLY EMPLOYER COST (add lines 6, 7, 8, 9,10) 11 _____

TOTAL HOURLY RATE TO BE BILLED (add lines 5, 11) 12 _____

* Determined by contract bargaining

** VACATION RATE

8 HOURS ACCUMULATED PER MONTH	4 6%
10 HOURS ACCUMULATED PER MONTH	5 8%
12 HOURS ACCUMULATED PER MONTH	6 9%
14 HOURS ACCUMULATED PER MONTH	8 1%
16 HOURS ACCUMULATED PER MONTH	9 2%
18 HOURS ACCUMULATED PER MONTH	10 4%

I understand that the amount on line 5 is the hourly amount that I will be paid when attending to authorized Union business during my normal work hours I also understand that I must take leave without pay and notify my agency of my doing so

MEMBER EMPLOYEE SIGNATURE

DATE

ARTICLE VII (AP&P)
PURCHASE AND RECORDING PURCHASES OF PERSONAL PROPERTY
(i e , equipment) BY LOCALS

Section 1 Inventory, Taxes, and Insurance on Equipment

- (a) An inventory record of all equipment over \$500 in cost owned by Locals is to be kept at Union Headquarters. Included in the inventory record is the name and address of the person personally responsible for the equipment and the address of the location of the equipment. At least annually, Union Headquarters will notify the Locals with equipment what is on the inventory list for their Local.
- (b) Equipment subject to any Local government personal property taxes will be paid for from the General Fund monies and billed back to the appropriate Local.
- (c) Insurance for any loss on the equipment will be obtained, if possible, by the Union and all costs for premiums and processing will be billed to the appropriate Local.
- (d) It is the responsibility of the highest elected officer(s) in the Local to assure that written notification is made to Headquarters concerning any changes in the location of or persons responsible for the equipment or purchase.

Section 2 Purchase of Personal Computers. The Information Systems (Computer) Department of the Union shall be contacted and recommend the specifications for the purchase of personal computers by Locals.

ARTICLE VIII (AP&P)
OTHER FISCAL MATTERS

Section 1 Authorized Signatures. Individuals authorized to sign Union checks are the President, Vice President, Secretary-Treasurer, Executive Director, Finance Director and the Administrative Services Director.

- (a) Union checks written in excess of \$10,000 shall require two authorized signatures and, where feasible, shall include one signature of a Statewide Officer and one signature of an authorized staff person. Internal transfers for payments between General Fund accounts may be performed electronically.

Section 2 Executive Committee Expenditure Authority. The Executive Committee, between regularly scheduled Board meetings, is granted the authority to approve expenditures, not to exceed \$7,500, which are consistent with the strategic planning goals adopted by the Union's Board of Directors. The Board of Directors will review all expenditures by the Executive Committee at the next regularly scheduled meeting (*UO #9 2002*).

Section 3 Accident Insurance. A \$50,000 per person group accidental death and dismemberment policy shall be maintained by the Union on each Board member and Assistant Director, covering them while performing official Union duties.

Section 4 Insurance Review The Union Finance Committee shall review periodically the insurance policies and the fidelity bonds covering Union risks

Section 5 Annual Audit The Union Finance Committee each year shall direct the staff to have a certified audit be made of the records and accounts for the Union

Section 6 Board Stationery Upon request, each Board member shall be furnished with a supply of Union stationery

Section 7 Supplemental Funds for Locals Any Local may petition the Board, through the Union Finance Committee, for increased funds to operate the Local Such petition shall be accompanied by a detailed budget request The Union shall set aside a fund to provide for such petition not in excess of 10 percent (10%) of the Local rebate amount budgeted for each fiscal year The Local may request in excess of 10 percent (10%) budgeted amount The amount over 10 percent (10%) is to be repaid to the fund as determined by the Union Finance Committee

Section 8 Benefit Information to Members on Leave Without Pay The Union shall be responsible for informing members on Leave Without Pay status that the members must pay insurance premiums to retain these benefits during said leave

Section 9 Reimbursement Payment Limits At least ten (10) days prior to attending the function, members will receive mail or email notification of what will or will not be reimbursed, and what the reimbursement limits are

Section 10 Requests for Financial Information

- (a) Requests for financial information from bargaining unit members shall be directed to the Secretary-Treasurer of the Union
- (b) The Secretary-Treasurer or designee may release a general overview of financial data
- (c) The Secretary-Treasurer may delegate information requests to a Board member, staff member, or Statewide Officer to explain financial documents

Section 11 Monetary Contributions to Charitable Organizations Monetary contributions from Union funds shall not be made to charitable organizations without Board approval However, the Board does encourage participation by Locals in the solicitation of funds, excluding Union funds, for charitable organizations Authorization must be obtained from the Board prior to any solicitation Between Board meetings the Executive Committee may approve such contributions or solicitations Locals shall be given the opportunity to donate to social issue requests

Section 12 Disposition of Local Funds Upon Decertification Upon decertification of the Union as the bargaining representative, it shall be the policy of the Union that the books, records, and funds of affected Local(s) be sent to the Union Secretary-Treasurer within ten (10) days for final review, audit, and transfer The Local funds, including any specially-designated funds, shall be placed in the Union General Fund, unless otherwise specified by the Board

Section 13 Advertisements in the Union Newspaper In the spirit of unionism, no advertisement will be carried in the Union newspaper from any company that has people out on strike against them, and/or is on the DO NOT PATRONIZE list recognized by the Union

Section 14 Membership Card A membership card shall be issued to each member of the Union

ARTICLE IX (AP&P) BARGAINING

Section 1 Bargaining Team Members of the negotiating team are the Executive Director, or designee, the members elected to sit at the bargaining table, and the staff assigned to sit at the bargaining table Responsibility for presentation to the Union's negotiating team demands, proposals, and other material to be considered in collective bargaining contract negotiations lies with the active membership Once negotiations have commenced, authority to make decisions at the bargaining table on behalf of the Union and the employees it represents, whether decisions to submit a proposal, change a proposal, withdraw a proposal, accept a counterproposal, or otherwise, shall lie with the negotiating team in accordance with what reasonably appears at the time to be in the best interests of the Union and the employees it represents (*C&B #10 1981, C&B #5 2010*)

Section 2 Bargaining Standards As part of the Union's strategic plan in bargaining current contracts or first contracts for new units, negotiations shall include

Bargaining to Organize simplified grievance procedures, accretion, contingent worker organizing, paid time off for union activists, rank and file leaders who rise to President and Executive Director for return rights to his/her bargaining unit position at the end of his/her term, standardized language as no discrimination based on religion, race, age, gender, marital status, sexual orientation or disability (*ER #5 1998*)

Union Security union successorship, Agency fee, checkoff (including political checkoff) Written summaries of contracts shall be maintained to enable bargaining teams to compare their contract standards with standards from other contracts These summaries will be available to bargaining teams when crafting proposals (*ER #13 2004*)

A template of sample contract language on non-economic contract terms such as subcontracting, union rights, and seniority will be maintained as a resource for bargaining teams in developing contract language (*ER #13 2004*)

Section 3 Ratification Unless otherwise required by law or unless otherwise agreed at the bargaining table, ratification of any contract may be limited to voting only by active members of the Union and may be conducted by either a printed secret ballot sent or delivered to active members in the bargaining unit or by vote of the active members at a membership meeting after reasonable advance notice specifying the date, time, place, and purpose of the meeting The method of ratification to be used in any particular situation shall be determined by majority vote of the negotiating team (*C&B #5 2010*)

Section 4 Signing The Executive Director is the only person authorized to sign collective bargaining agreements in the name of the Union

Section 5 Role of the Board of Directors in Bargaining

- (a) The Board is responsible for all contracts bargained
- (b) The Board, through its Executive Committee, shall be aware of the progress of all contract negotiations

Section 6 Bargaining Costs

- (a) The General Fund will assume all bargaining expenses for negotiations. Specifically, such expenses shall include

- 1 Negotiations, caucus time, and team meetings which are scheduled during an employee's workday and not subject to reimbursement under a collective bargaining agreement,
- 2 Mileage, meal, and overnight lodging expenses,
- 3 "Negotiation News," "Strike Alerts," and other forms of written communication regarding negotiations which are produced by Union Headquarters,
- 4 Contract printing expenses, and
- 5 Bargaining conference expenses

- (b) In order to avoid the General Fund assuming unnecessary costs

- 1 All bargaining participants will be expected to carpool, where feasible, and to share motel rooms when lodging is required
- 2 Efforts should be made by negotiation spokespersons to schedule sessions so as to minimize expenses while insuring maximum opportunity for productive bargaining sessions
- 3 All bargaining expenses must be approved on a session-by-session basis. Approval of bargaining expenses must be done by the Chairperson and the staff bargaining spokesperson

- (b) In order to separate bargaining expenses from ongoing expenses of a Local which occur during contract negotiations, including meetings to update membership on bargaining developments, the General Fund will generally only pay for "bargaining tours" which are conducted by the bargaining teams and which are part of a pre-established bargaining plan. Local "bargaining tours" will be paid by the particular Local involved in the tour. In rare instances, when it is determined by the Executive Director, or his/her designee, that the Local's issue has statewide impact and a tour is part of an adopted bargaining plan, specific tour expenses can be reimbursed from the General Fund

ARTICLE X (AP&P)
DELEGATES TO DAS AND OUS BARGAINING CONFERENCES

Section 1 Delegates to bargaining conferences for DAS and OUS

(a) All Locals of the Union included in the DAS and OUS bargaining process shall elect their bargaining delegates according to their constitution and/or bylaws, a minimum of fourteen (14) months prior to the expiration of the statewide contracts. The number of bargaining delegates will be determined by the yearly average of bargaining unit employees in the year ending the previous September.

1 All Locals included in the DAS and OUS bargaining process will report the names of their bargaining delegates to Union Headquarters by said date. Any Local not reporting the names of their bargaining delegates in a timely manner, and without good excuse, may have delegates chosen for them by a committee appointed by the President of the Union, said committee members shall be chosen with the approval of the Board of Directors (*ER = 13 1990*)

(b) The number of bargaining delegates for each DAS and OUS Local shall be as follows

1 delegate	1-75 dues payers*
2 delegates	76-300 dues payers*
3 delegates	301-700 dues payers*
4 delegates	701-1100 dues payers*
5 delegates	1101-1500 dues payers*
6 delegates	1501- 1600*
1 additional delegate	for every 1000 above 1600*

*"Dues payers" refers to dues and fair share payers

(c) Each delegate shall be an active member of the Union and shall be elected by the Local he or she represents according to that Local's constitution and bylaws.

(d) Any delegate not performing the duties described below or not in regular attendance at bargaining events may be removed by the Local according to their constitution and bylaws or by the Board of Directors by majority vote.

(e) Each Local shall be entitled to one (1) vote for each dues payer in the Local based on the average number of dues payers for the year ending the previous September. Where there are two (2) or more delegates in attendance, the vote shall be divided equally among them.

(f) The duties of the delegates shall be as follows

- 1 Attend all scheduled bargaining meetings,
- 2 Create a communication system to communicate bargaining issues within the Locals,

- 3 Represent their Locals at coalition bargaining sessions,
- 4 Elect a Coalition, Campus, or team Chairperson, and
- 5 Educate and inform Locals of bargaining issues at regular intervals

Section 2 Chairpersons

- (a) Each candidate for Chairperson must be a member in good standing of the Union, must be an authorized delegate to the bargaining conferences, and must be willing and able to spend the time necessary to complete their duties
- (b) Each coalition, campus or team shall elect their own chairperson(s) according to Robert's Rules of Order (Revised) at a regular bargaining conference as scheduled by the Board of Directors. Each voting delegate shall vote according to Section 1, subsection (e) of this Article
- (c) A Coalition, Campus or team Chairperson may be removed by a majority vote of the coalition/campus/team or by a majority vote of the Board of Directors. Each chairperson serves at the pleasure of the Union
- (d) The duties of the chairperson(s) are as follows

- 1 Report to the Board of Directors acting through the Executive Committee on the progress of bargaining from organization through proposals to the conclusion of a tentative agreement,
- 2 Coordinate and organize their coalition/campus/bargaining unit to insure adequate representation of each Local and to insure communication between the bargaining team and the Local, and
- 3 Represent their coalition/campus/bargaining unit at the bargaining table

Section 3 DAS Classification Appeals Panel Position This position and an alternate member will be elected by the DAS central table bargaining team

ARTICLE XI (AP&P) INDIVIDUAL EMPLOYEE REPRESENTATION AND ARBITRATION SCREENING

Section 1 General Policy In representing individual employees, the Union applies the following general policies

- (a) The Union shall represent the needs of those employees who are in bargaining units represented by the Union
- (b) The Union seeks to furnish representation to its members in employment-related matters to the extent it is economically feasible, compatible with the governing documents and with other policies of the Union, and legally and ethically proper
- (c) As a representative of employees in a bargaining unit, the Union is required to represent both members and nonmembers of the Union in their employment relations with their employers
- (d) The Union may represent nonmembers in proceedings in which there is an issue that could have a substantial effect upon the interests of the members

- (e) The Union shall not represent any employee individually without his/her consent
- (f) The Union shall continue to seek legal ways of representing the needs of members who are not in bargaining units and who are excluded
- (g) The Union will represent members in discrimination grievances to the extent permitted by the applicable collective bargaining agreement

Section 2 Areas of Representation Union representation of individual employees in employment-related matters encompasses representation in the following areas

- (a) Grievance processing under the contractual grievance procedure,
- (b) Referral of an unresolved grievance to arbitration as provided for in the collective bargaining agreement,
- (c) Appeals to the Employment Relations Board (ERB) Such statutory remedies are applicable to dismissals, suspensions, reductions, demotions, classifications, and arbitrary or illegal actions, and
- (d) Appropriate court proceedings

Section 3 Limitations in Grievance Representation The Union cannot represent any grieving employee in a bargaining unit where another organization is the certified representative

Section 4 Limitations in Workers' Comp and Unemployment Insurance Appeals The Union shall not represent any employees in appeals of workers' compensation or unemployment insurance actions, unless the determination of the case would have substantial effect upon the interests of its members

Section 5 Limitations in Court The Union shall not provide court representation or assistance to nonmembers, unless the determination of the case would have substantial effect upon the interests of its members Although members may be provided such representation, it is limited to employment-related matters Also, this representation for members may be denied for such reasons as excessive expense, lack of probability of securing a desired legal result, or lack of legal importance to the membership generally Representation at a lower court level will not automatically entitle an employee to representation by the Union in a higher court

Section 6 Representation Costs The following policies apply to the costs of Union representation for individual employees in employment-related matters

- (a) The Union will be responsible for filing fees, costs of counsel, transcripts, stenographic services, and other court costs
- (b) The Union reserves the right to refuse to be responsible for the payment of statutory witness fees and mileage of witnesses, but may designate a limited number of witnesses for whose fees and mileage it will be responsible
- (c) The Union will not be responsible for the per diem or other expenses of either the employees it represents or their witnesses

Section 7 Arbitration Screening and Appeal Procedures

- (a) There shall be two (2) levels of review of grievances considered for arbitration the first before an Arbitration Screening Panel, and the second before the President
- (b) An Arbitration Screening Panel is convened for each review The Panel shall include at least two (2) stewards (chief stewards where possible) who are neutral and not connected with the grievance or the employer involved and a staff adviser The Stewards shall rotate through this assignment from meeting to meeting, based on regional Arbitration Screening Panel rotations lists (*ER #8 2004*)
- (c) Training will be offered to all stewards who wish to be selected for Arbitration Screening Panels Priority for selection to the Panels will be given to stewards who have completed training (*ER #5 2004*)
- (d) Decisions of an Arbitration Screening Panel to deny arbitration of a grievance shall be appealable by the grievant(s) to the President within ten (10) calendar days of notice from the Panel
- (e) The second level of review shall be conducted by the President, and in the event the grievant is the President, by the Vice President The decision at this level shall be final

Section 8 In the representation of represented employees on grievances, disciplinary actions, any other claims or complaints, the Union retains the right to refuse to file or pursue any such matter at the Employment Relations Board, at arbitration, or in the courts if, in the judgment of the Union, the merits of the case justify such a decision (*C&B #5 2010*)

ARTICLE XII (AP&P) UNFAIR LIST

Section 1 General The Union uses a procedure of publicizing an "Unfair List" or "Do Not Patronize List" of those companies, agencies or persons demonstrating a pronounced lack of good faith in responding to employee relations matters stipulated in law, rule, or contract The Union refers to the state AFL-CIO unfair list as a guide

Section 2 Grounds Grounds for placement on the Union's Unfair List are

- (a) The failure to comply with statutory regulations regarding "unfair labor practices",
- (b) The conduct of other "unfair labor practices" as established by state or federal courts, or by regulatory agencies, or
- (c) The failure to accord any right to a Union member or representative as provided by statute or contract

Section 3 Processing All requests for placement on an Unfair List shall be addressed to the Board for action Such requests may be made by the Executive Director, staff organizers, Union committees, or representative groups of member employees from an involved agency The Board, in its review, may conduct a hearing where the affected person(s) being considered are invited to appear

Section 4 Publicity The Union will maintain an Unfair List and publish the list in available media

Section 5 Removal Only the Board or the Executive Committee has the power to remove any company, agency or person from the Unfair List The Board shall review the Unfair List periodically for update purposes

ARTICLE XIII (AP&P) POLICY FOR ADMISSION OF WORKERS INTO THE UNION

Section 1 Purpose The purpose of this policy statement is to establish guidelines for admission of other workers as members of the Union

Section 2 Approval Other worker groups may not certify themselves as members of the Union without approval of the Board of Directors and/or General Council

Section 3 Investigation Investigation of applications for workers wishing certification as Union members shall be conducted by the Executive Director and staff with timely reports to the Board of Directors

(a) Executive Director and/or staff shall, as a minimum, closely inspect the (1) Intent, (2) Feasibility, (3) Financial status, and (4) Potential benefits to both parties

1 "Intent" means new organizations will not be admitted without sufficient evidence of ability and willingness to conform with and support the Union's governing documents

2 "Feasibility" means that upon admission benefits will accrue to both parties

3 "Financial Status" means the Union will not assume any unusual debts nor incur excessive expenses in acquiring these new members However, expenses involved in certification of new members to the Union shall be negotiated with the group applying for membership

4 "Potential benefit to both parties" means representation by the Union as well as the fullest possible participation in all activities of the Union by the new members

Section 4 Admission Admission of all new members shall be in accordance with Union governing documents

(a) Structure of new organizations shall conform to existing Union Bylaws

(b) New members without sufficient numbers for a Local shall be placed into the closest existing Local

(c) New groups with sufficient numbers for a Local of their own may opt to join Locals that exist in their area, or form their own Local

(d) The Board of Directors, when negotiating an affiliation agreement with an existing organization, may negotiate the phasing in of the existing Union dues structure over a period of time not to exceed five (5) years

ARTICLE XIV (AP&P) AFFIRMATIVE ACTION AND EQUAL OPPORTUNITY

Section 1 Union Commitment Through a program of affirmative action, the Union commits itself to a leadership role in ensuring fair and equal opportunities for employment, hiring practices and advancement in employment and in Union operations

Section 2 Affirmative Action "Affirmative Action," means a program for eliminating the effects of discrimination, intended or unintended, that are evident or indicated by analysis of present employment patterns, practices, and policies

Section 3 Equal Opportunity "Equal Opportunity," means that there shall be fair and equal opportunities for employment and advancement regardless of race, religion, national origin, age, gender, gender identification, marital status, sexual orientation, or disability The Union will work to have agency or state rules adopted to stop the practice of promoting pre-chosen individuals without valid consideration of all employees qualified for promotion

Section 4 Responsibility The Board has the major responsibility for implementing the affirmative action and equal opportunity policies of the Union

ARTICLE XV (AP&P) STAFF

Section 1 Staff Salaries, Benefits, and Working Conditions Except for the Executive Director, the salaries, benefits, and working conditions of all staff personnel are governed by the then-in-force collective bargaining agreement between the Union and the staff, personnel policies, or hire agreements for managerial staff

Section 2 Executive Director Authority The Executive Director is authorized to hire, fire, reward, or discipline all staff members in the manner provided for in the collective bargaining agreement, or applicable hire agreement Benefits for staff covered by the collective bargaining agreement shall also apply to excluded staff, or as set forth in these Administrative Policies & Procedures In setting salaries for each staff member, the Executive Director shall operate within the ranges that have been negotiated

Section 3 Retirement System A staff retirement system shall be provided through the SEIU Local 503, Oregon Public Employees Union Retirement and Thrift Fund A 401K Deferred Compensation Plan shall be made available to Union staff

Section 4 Staff Hiring and Advancement There shall be written personnel policies for the recruitment, hiring, and promotion of staff personnel More specifically, there shall be

- (a) An appropriate type of job application form,
- (b) Written job position descriptions that contain a specification of the responsibilities of each position, a brief description of the larger setting within which the persons will function, and a list of the job-related minimum skills and desired skills sought in applicants,

- (c) An advertising policy for openings that involves contacts of groups specifically oriented to and concerned with minorities, females, and others subject to potential discrimination in hiring, and
- (d) Preference given for Union employment in the following order present Union members, prior Union experience, and all others
- (e) A concerted effort shall be made to notify all Union members for all current and impending openings

Section 5 Benefits Management. There shall be a staff position assigned to the area of benefits management This person shall monitor the existing Union benefit programs offered to members and shall keep current on new programs becoming available Also, this person shall be the staff advisor to Union committees working with retirement, insurance, and other employee benefits

Section 6 Union Organizer Assignment The Executive Director will assign Union Organizers' time in the various areas of the state at his/her discretion However, significant changes in Union Organizers' assignments shall not be made without reasonable notice to the president of each Local that would be affected by such change Organizer assignments shall be maintained on the web page

Section 7 Human Resources Director This position shall be responsible for maintaining a conflict resolution process, to help resolve disagreements or disputes respectfully The Human Resources Director will make recommendations to assist the Union in becoming a more open and democratic organization that will promote labor-management cooperation and make meaningful performance review of the staff (*C&B #10 1998*)

Section 8 Training Director This position will be responsible for designing and implementing an ongoing training program for members and staff

ARTICLE XVI (AP&P) HEADQUARTERS RECORDS

Section 1 Records Availability One (1) of the following documents shall be maintained at Headquarters in a place and manner allowing availability for inspection by any Union member

- (a) The latest revised Union Bylaws,
- (b) The minutes of all Board meetings,
- (c) The Existing Policy Resolutions document,
- (d) The Collective Bargaining Agreement between the Union and the staff,
- (e) The Administrative Policies and Procedures of the Union,
- (f) All Collective Bargaining Agreements,
- (g) The various agreements between the Union and employers

Section 2 Records Retained Permanently The following records shall be maintained permanently at Headquarters or appropriate storage facility

- (a) Annual Union budgets,

- (b) Annual professional audit reports,
- (c) Local charter records and other information on Local formations,
- (d) General Council Resolutions,
- (e) Legal, historical, and long-term correspondence items relating to policy,
- (f) Union Board minutes,
- (g) IRS Specifications,
- (h) Value of lands and buildings during ownership, and
- (i) Applications for membership/2-cent check-off enrollment

Section 3 Records Retained for Seven (7) Years The following records shall be maintained at Headquarters or appropriate storage facility for a minimum of seven (7) years

- (a) Accounting ledgers,
- (b) Cash received records, and
- (c) General Fund reimbursement billings

Section 4 Records Retained for Five (5) Years The following records shall be maintained at Headquarters or appropriate storage facility for a minimum of five (5) years

- (a) Balance sheets,
- (b) Local membership reports,
- (c) Group insurance plan payroll deduction authorization forms for former staff employees,
- (d) Payroll reports,
- (e) Personnel records of terminated staff employees,
- (f) Profit and loss statements,
- (g) Time sheets, and
- (h) Withholding tax records

Section 5 Records Retained for Three (3) Years The following records shall be maintained at Headquarters or appropriate storage facility for a minimum of three (3) years

- (a) Bank deposit slips,
- (b) Bank statements,
- (c) Canceled checks,
- (d) Local membership reconciliations and billings,
- (e) Group insurance agency billings and reconciliations,
- (f) Equipment value records of disposed equipment,
- (g) Paid invoices,
- (h) Personnel applications of persons not employed as staff,
- (i) Telephone toll charge records, and
- (j) Travel, meal, and lodging expense claim forms

Section 6 Records Retained for Two (2) Years The following records shall be maintained at Headquarters for a minimum of two (2) years

- (a) General correspondence,
- (b) Committee meeting minutes,
- (c) Group insurance bank deposit listings by agencies,
- (d) Insurance application eligibility denials, and
- (e) Membership voting data for all statewide elections, including but not limited to CAPE, statewide officer and Board seat elections

Membership voting data will be available to each Local president for internal use, and to each Board director in the same geographic or employer group. This information will be available to declared candidates for CAPE positions, Board seats, and statewide office provided the candidates are in the same geographic or employer group, except for statewide office as they would represent all groups. Membership voting data will be maintained for a minimum of two years and may be furnished in either electronic or paper format at the discretion of the requestor.

Section 7 Records Retained for One (1) Year The following records shall be maintained at Headquarters or appropriate storage facility for a minimum of one (1) year:

- (a) Group insurance contracts,
- (b) Group insurance death claim records,
- (c) Group insurance disability claims,
- (d) Insurance policies, and
- (e) Statewide and Local election ballots, tally sheets, envelopes, and related election material

Section 8 Record Disposal Once records have met their retention schedule, confidential records containing personal information, shall be shredded. Other materials can be recycled.

Section 9. Audit Requirements In order for the time limits found in Sections 3 through 7 of this Article to apply, audits must have been completed and a satisfactory report of the audits must have been received by the Board for the following records:

- (a) Balance sheets,
- (b) Bank deposit slips,
- (c) Bank statements,
- (d) Canceled checks,
- (e) Cash received records,
- (f) Local membership reconciliations and billings,
- (g) Equipment value records after equipment disposal,
- (h) Group insurance plan payroll deduction authorization forms for former employees,
- (i) Paid invoices,
- (j) Profit and loss statements,
- (k) Telephone toll charge records,
- (l) Time sheets,
- (m) Travel, meal, and lodging expense claim forms,
- (n) Vouchers, and
- (o) Withholding tax records

ARTICLE XVII (AP&P) USE OF UNION FACILITIES

Section 1 Meeting Rooms The policies for the use of Union facilities for meetings are as follows

- (a) The first priority is extended to Union staff performing administrative responsibilities and to Union committees including CAPE,
- (b) The second priority is extended to Locals,
- (c) The third priority is extended to nonmember groups Such groups may be granted a firm reservation for use of Headquarters rooms up to two (2) weeks in advance of the meeting date, provided there is no conflict with a member group's scheduled meeting when the reservation is requested The Union reserves the discretion to decline such requests,
- (d) A reasonable fee to cover the cost of room use shall be charged to all nonmember groups,
- (e) Waiver of the room use fee for nonmember groups may be granted by either the Board or the Executive Director only when such a waiver would be in the best interests of the Union, and
- (f) Union facilities/meeting rooms shall not be used for private, personal activities

Section 2 Other Services The policies for the use of such other Union services such as staff time and supplies are as follows

- (a) The first priority is extended to Union staff performing administrative responsibilities and to Union committees including CAPE,
- (b) The second priority is extended to Union Locals,
- (c) A reasonable fee to cover the additional cost of staff time and supplies may be charged to Locals, and CAPE if applicable, and
- (d) Nonmember groups require approval by the Board or Executive Director for the use of other Union services

ARTICLE XVIII (AP&P) STUDENT FINANCIAL ASSISTANCE AWARDS

Section 1 General The Union offers a program of financial assistance to Union members, their spouses, domestic partners, sons, daughters, stepsons and stepdaughters, grandsons and granddaughters, and also to laid-off members and dependents of deceased members who were active members at the time of their death These applicants must be enrolling in accredited colleges, universities, professional schools, community colleges, junior colleges or vocational schools This assistance includes both first-time Financial Aid awards and Grants-In-Aid to students currently enrolled in the aforementioned schools Laid off members are those who were active, full-time members at the time of lay-off, remain on the lay-off list, are not eligible for active membership and have not accepted full-time employment

For this purpose “laid-off” members include seasonal, on-call and intermittent employees who have been unscheduled and remain on the reemployment lists for those groups and who have not accepted full-time employment

Section 2 Financial Aid Defined Financial Aid is an award based upon both scholastic achievement and financial need. It is awarded to a person preparing to enter a full-time program in an accredited college, university, professional school, community college, junior college or vocational school. Each award may be an amount up to a maximum scholarship each year of \$1,500. If the recipient is attending semesters, it would be awarded as \$750 per semester. If the recipient is attending quarters (terms), it would be awarded as \$500 per quarter. The award is payable to the institution of the awardee’s choice. For an active Union member, their spouse, domestic partner or a laid off member, the maximum amount shall be the same as for a Grant-in-Aid, with part-time enrollment also acceptable.

Section 3 Grant-in-Aid Defined Grant-in-Aid is an award based upon financial need and the satisfactory academic progress according to the institution's policies, awarded to a student who is currently enrolled in a full-time program at an accredited college, university, professional school, community college, junior college or vocational school, to enable the student to remain in school. In the case of an active Union member, their spouse, domestic partner or a laid-off member, part-time enrollment is acceptable. Each award may be an amount up to \$500 per quarter, \$750 per semester, or \$1,500 per school year, and is payable to the institution at which the student is enrolled. The award amount for part-time enrollment will be \$750 per school year.

Section 4 "Term" Defined A term or “quarter” is considered to be one-third (1/3) of a school year or twelve (12) weeks.

Section 5 "Semester" Defined A semester is considered to be one-half (1/2) of a school year or eighteen (18) weeks.

Section 6 Duration of Awards Each Financial Aid or Grant-in-Aid award is made for one (1) school year (three (3) terms or two (2) semesters) commencing with the fall term (semester) and concluding with the end of the spring term (semester). To remain eligible for the awards the student must maintain satisfactory academic progress according to the institution's policies for students receiving federal title for aid. Continuation of Financial Aid or Grant-in-Aid beyond the initial year of funding requires reapplication and approval.

Section 7 Program Financing Funds for the Union Financial Aid and Grant-in-Aid programs come from those membership dues which the dues payer dedicates for that purpose. In addition, the Member Benefits Committee may hold fundraising events to increase the amount of money available for scholarships. Awards shall be funded from the actual on-hand funds available. Any charges by the Oregon Student Assistance Program to administer the Union Scholarship program shall be paid out of the scholarship fund.

Section 8 Nominations Nominations for Union financial awards must be made by active, laid-off or retired Union members in good standing. Active members may nominate themselves, their spouse, domestic partner, a daughter, a son, a stepson, a stepdaughter, a grandson or a

granddaughter Laid-off members may nominate themselves Those nominating must have been active members of the Union at least one (1) year to be eligible to nominate Sons, daughters, stepsons, stepdaughters, grandsons, and granddaughters must be under the age of twenty-five (25) at the time the application is due to qualify for initial awards, and will be considered only for programs below the bachelor's degree level

Section 9 Awards Union members who are currently employed or have been laid off are encouraged to apply for financial aid to further their education and retrain themselves in areas of specialization in which there are greater prospects of employment Enrollment in college, university or professional programs devoted to labor relations or labor-education related studies is encouraged One-third (1/3) of each year's financial aid funds will initially be reserved for members in the category of this section Should there be no applicants for these funds, the money will be released to other applicants who qualify

Section 10 Selections All applications for financial assistance are reviewed and selections made by the Oregon Student Assistance Commission.

Section 11 The Member Benefits Committee is responsible for dealing with scholarship issues and making recommendations to the Board

ARTICLE XIX (AP&P) POLITICAL CANDIDATES

No subdivision, group or any person representing the Union shall involve any political candidate or political figure not endorsed by the Union in any official function or any activity connected with the Union unless they have permission from Citizen Action for Political Education (CAPE).

The Union's Board of Directors is granted authority to make all endorsements for candidate races except where authority rests with the SEIU Oregon State Council (statewide elected officials and federal candidates)

ARTICLE XX (AP&P) SEIU OREGON STATE COUNCIL AND LABOR COUNCILS

Section 1 Participation No subdivision of the Union shall join or participate in any Labor Council without prior approval of the Board of Directors

Section 2 Approval Any Director may petition the Board for approval and shall provide

- (a) Number of members,
- (b) Per capita costs,
- (c) Number of seats on the council,
- (d) When voting rights are obtainable,
- (e) Area the council covers, and
- (f) Copy of the council's constitution and bylaws

Approval shall be by individual council

Section 3 Membership on Labor Councils The delegates to Labor Councils shall be Union or staff members of the Union Labor Council delegates shall be recruited by the Directors, subject to approval by the Board The Union shall provide the Director(s) with a list of labor councils for which they are responsible for recruiting delegates *(UO =3 1994)*

(a) Only staff members who work or reside in the geographic region may represent the membership on a Labor Council

(b) Labor Council members may be removed for cause, which includes nonattendance of at least three (3) consecutive Labor Council meetings, and other such conduct in accordance with the Union's Bylaws

(c) Terms of office of a Labor Council delegate will follow the labor council's constitution and bylaws Unless otherwise stated in the council's constitution and bylaws, there will be no limit on the number of terms a delegate can be elected

Section 4 Funding The General Fund shall provide the per-capita cost, or such other special payment arrangement as agreed upon by the Board of Directors, by a motion at a regular meeting of the Board of Directors

Section 5 SEIU Oregon State Council

(a) **Delegates** The Union President and the Executive Director or designee shall serve as delegates to the SEIU Oregon State Council Delegates to the Oregon State Council will take their direction from the Board

(b) **Removal or Replacement**

1 Removal will be by a two-thirds (2/3) vote of the Union Board of Directors

2 In the event of a vacancy, the Board shall fill the position at the next Board meeting, to complete the unexpired term

ARTICLE XXI (AP&P) POLICY FOR USE OF STRIKE AND JOB PROTECTION FUNDS

Section 1 Strike and Job Protection

Fifty cents (\$.50) per dues payer per month shall be placed in Local 503's Strike Funds Of that fifty cents (\$.50), thirty cents (\$.30) shall be allocated to the Strike Benefits Fund The remaining twenty cents (\$.20) shall be allocated to the Strike and Job Protection Fund, which shall be used for the protection of Union members against strikes and ballot measure campaigns that threaten the well-being of Union members *(UO =13 2008)*

Section 2 Funded Activities Activities to be funded from this Strike and Job Protection Fund are

- (a) Materials to make picket signs and other types of informational signs,
- (b) Food and beverages for those persons that are actively engaged in authorized activities supporting the strike picket lines, strike committees, supply functions,
- (c) Additional staffing to communicate and coordinate activities leading to a strike vote and authorized strike-related activities,
- (d) Advertising and publicity to promote understanding of the issues surrounding the strike,
- (e) Transportation to and from picket sites, and
- (f) Strike benefits for all striking members

The Strike Benefits Fund shall be used solely to pay benefits to strikers

Section 3 Limit of Expenditures No transfers or expenditures will be made from this fund without a two-thirds (2/3) vote of the Board of Directors then in attendance Total of all transfers or expenditures of dollars from the fund for targeted organizing, secondary projects, and ballot measure campaigns shall not exceed the balance of the fund after such transfers or expenditures are made Fifty (50%) percent of increased dues revenues from targeted organizing campaigns financed from the Strike and Job Protection Fund shall be returned until the fund is reimbursed The Executive Director shall be required to keep the expenditures of funds within these guidelines

Section 4 Strike Benefits Whenever the Union engages in collective bargaining, the Board of Directors shall authorize a portion of the current funds in the Strike Benefits Fund for a strike action Utilizing this allocation, the Statewide Hardship Committee established for the strike shall determine the amount of the benefit payable to strikers during the strike based on the amount budgeted and the strategic situation and shall notify the members of the benefit amount before the strike is declared The amount of the benefit shall be calculated based on the number of days a worker was on strike The benefit shall be paid weekly once the worker has been on strike at least seven days and when the fund has reached a threshold of at least \$2 million The benefit rate shall be the same for all strikers engaged in the particular strike Benefits are payable only to strikers who are members in good standing and who appear daily on the picket line, engage in Flying Squadron activities or other activities authorized by the union (*ER* 3 1996)

- (a) Strikers may be excused because of illness, handicap or other legitimate reason rendering them unable to participate upon application to the picket captain
- (b) Fair share payers may sign up to become members when the strike begins and receive benefits if they participate in the strike activities Assistance may be distributed to striking fair share payers who cannot join the union due to bona fide religious or legal reasons Final decision on entitlement to benefits shall be made by the Statewide Hardship Committee in accordance with these rules

Section 5 Strike Personal Assistance Funds Members may voluntarily contribute money and living items to centralized locations Money received must be receipted to the individuals and placed in separate accounts at Headquarters and controlled by the Statewide Hardship Committee where the money was collected Money, food, and other grocery items will only be disbursed to

properly authorized vouchers (supplied by Headquarters and issued by the Statewide Hardship Committee and authorized by the Statewide Hardship Committee Chairperson and one (1) committee member) Assistance shall be restricted to those individuals with proof of involvement in authorized strike activities Picket leaders and staff strike area coordinators certify participants as proof of involvement

Section 6 Priority of Assistance Assistance will be provided to actively involved members in the following priority sequence

- (a) Single-parent families with young children (ten (10) years old or under) and two (2)-parent family units with young children where the striker is the only wage earner,
- (b) Family units with older children (eleven (11) years old or older) and the striker is the only wage earner,
- (c) Members and families with special, critical medical needs, and then
- (d) All others

Section 7 Application for Assistance Applications for assistance are to be completed by the striker and submitted to the Local Hardship Committees.

Section 8 Assistance Fund Control The Statewide Hardship Committee is responsible for assigning persons as Treasurers in each major area to receive and receipt monies Duplicate copy receipt books are to be used These Treasurers will transmit money and checks to the Statewide Hardship Committee with an itemized list of donors and identifying area Receipt books are to be turned in by the Treasurers at the end of the strike

Section 9 Dues Assessment/Issues Fund There shall be an on-going dues assessment dedicated to promoting and defending the interests of the membership through public issue campaigns including ballot measures The amount, as determined by the Board, is not to exceed \$3 00/month (pro-rated for part-time employees), the issues and initiative deduction will be suspended when the fund balance reaches \$1 5 million and resumes again when the fund spends down to \$500,000 (*UO = 10 1998*)

ARTICLE XXII (AP&P) INVESTMENT GUIDELINES

Section 1 The Union's Investment Goals The Union's investment goals are as follows

- (a) To obtain as high a level of interest income as possible while maintaining the necessary liquidity, for the Union's various funds cash-flow requirements, and safety of capital,
- (b) Take into consideration the social and economic impact of our investments, and
- (c) Where possible and in conformance with long-term plans of the Union acquire plant and equipment rather than rent or lease

Section 2 Investment instruments and security Investments will be managed to maximize yield and minimize risk

Section 3 Social & Economic Considerations

- (a) Purchase instruments that create jobs and develop the Oregon and American economy, attempt to avoid making investments that tend to drain capital from the United States or finance repressive foreign regimes,
- (b) Do not knowingly invest in the obligations of corporations that consistently violate statutes enforced by or regulations of the National Labor Relations Board or the Equal Employment Opportunity Commission,
- (c) Do not knowingly invest in obligations of firms that appear on the national AFL-CIO "Do Not Patronize" list, and
- (d) Do not knowingly invest in obligations of corporations that encourage privatization of governmental work

Section 4 Authorizes the Establishment of Investment Accounts The President, Secretary-Treasurer, Executive Director, Finance Director and the Administrative Services Director are authorized to be signatories, any two (2) of which may sign to move funds to any accounts, where necessary, to make investments The four (4) above identified persons are given authority to open accounts where necessary for investments Any accounts opened under this Article of the AP&P are to be identified at the next regularly scheduled Union Finance Committee meeting and listed in the minutes The operational accounts will continue as recognized by Union Finance Committee and Board action

Section 5 Union Finance Committee Responsible for Monitoring Investments The Union Finance Committee is responsible to monitor the activities of investments of Union funds in order to assure compliance with the policies of this Article The Union Finance Committee is authorized to obtain the services of an investment advisor to assist in the performance of these responsibilities

ARTICLE XXIII (AP&P) OATH OF OFFICE

The oath of office for new officers is as follows

"I do hereby solemnly affirm that I will faithfully discharge the duties of the office to which I have been elected according to the Bylaws of the SEIU Local 503, Oregon Public Employees Union to the best of my ability "

ARTICLE XXIV (AP&P) MEMBER LEADERSHIP DEVELOPMENT

The Union is committed to developing rank and file member leaders Each staff organizer is responsible for identifying, recruiting and developing leaders as a core duty of their position The Union will continue leadership development through a combination of 1-1 skills assessments, mentoring and training programs in areas such as political power, organizing, communication

skills and contract enforcement Member leaders will work with their organizers to design and implement development plans that meet their individual needs

ARTICLE XXV (AP&P) COMMUNICATION GUIDELINES

The following statement of criteria will be published by the Union once each year for use by Locals in setting editorial policies

- (a) The purpose of all forms of Union mass communication, such as newsletters and email alerts, is to communicate Union policy and information to our membership
- (b) In order to facilitate open discussion, Locals may disseminate signed guest commentaries such as op-ed columns and letters regarding Union policies An attempt should be made to present a balanced viewpoint when there are multiple submissions
- (c) Anonymous letters will not be published
- (d) Signatures may be withheld, if requested for a justifiable reason such as the possibility that the content could endanger the writer in relation to reputation, the job, or personally In all other cases, letters must include the writer's name
- (e) Articles bearing pseudonyms will not be published (*MA* =8 1992)

ARTICLE XXVI (AP&P) TELEPHONIC MEETINGS

Special Meetings of the Union and all subordinate governing bodies may be held by telephone conferences subject to the following

- (a) A majority of the members requested to attend the meeting shall have access to the appropriate telephonic meeting media, as verified by their response to a call for any particular meeting
- (b) The technology used for the telephonic meetings shall allow the members full access to and full participation in all meeting transactions, either continuously or intermittently throughout the specified time of the meeting
- (c) The affirmative vote of a majority of the quorum shall be the minimum vote requirement for the adoption of any motion A majority of the votes cast, or a greater proportion as indicated by the adopted Parliamentary Authority, shall be necessary for the adoption of motions
- (d) Procedural rules related to the conduct of telephonic meetings shall be established and promulgated by the governing body wishing to conduct such meetings
(*MA* =5 2008, *C&B* =5 2010)

Additional Data

Software ID:

Software Version:

EIN: 93-0323147

Name: SEIU Local 503 Oregon Public Employees Union

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
JOE DINICOLA IMMEDIATE PAST PRESIDENT	1 00	X		X				0	0	0
LINDA BURGIN PRESIDENT	40 00	X		X				76,824	0	4,410
SONYA REICHWEIN VICE PRESIDENT	1 00	X		X				1,560	0	0
CATHERINE STEARNS DIRECTOR	1 00	X						0	0	0
DANIEL SMITH DIRECTOR	1 00	X						0	0	0
GINA SANTACROCE DIRECTOR	1 00	X						0	0	0
GARY WOLF DIRECTOR	1 00	X						0	0	0
MARY WOOD DIRECTOR	1 00	X						0	0	0
PORTIA MOYE DIRECTOR	1 00	X						0	0	0
LEA SPENCER dIRECTOR	1 00	X						0	0	0
ANITA PECOFF DIRECTOR	1 00	X						632	0	0
JAMES JACOBSON dIRECTOR	1 00	X						0	0	0
BELINDA MELENDEZ DIRECTOR	1 00	X						0	0	0
SANDY HUCKLEBERRY DIRECTOR	1 00	X						0	0	0
CAMERON MCGINNIS dIRECTOR	1 00	X						0	0	0
DEBORRA LOW DIRECTOR	1 00	X						0	0	0
ROSALIE PEDROZA DIRECTOR	1 00	X						0	0	0
RANDY DAVIS DIRECTOR	1 00	X						0	0	0
TRISH LUTGEN DIRECTOR	1 00	X						0	0	0
PHYLLIS WILLS DIRECTOR	1 00	X						82	0	0
KAY SCHNEIDER DIRECTOR	1 00	X						0	0	0
BARTON LEWIS RETIREE LOCAL BOARD MEMBER	1 00	X						11,749	0	3,382
BARBARA CASEY SECRETARY-TREASURER	1 00	X		X				1,755	0	0
MARGARET NEEL DIRECTOR	1 00	X						0	0	0
GARY LANE DIRECTOR	1 00	X						0	0	0

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
LESLIE FRANE EXECUTIVE DIRECTOR	45 00			X				92,508	0	26,631
JAMES GREER FINANCE DIRECTOR	45 00			X				78,379	0	26,292
MARTY CHILDS finance director	45 00			X				20,712	0	10,176
Rich Peppers Interim Executive Director	45 00			X				87,432	0	34,025
Kathie best past president	45 00						X	71,524	0	18,411

Form 990, Part IX - Statement of Functional Expenses - 24a - 24e Other Expenses

<i>Do not include amounts reported on line 6b, 8b, 9b, and 10b of Part VIII.</i>	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
INCOME TAXES	10			
ISSUES FUNDING	1,259,449			
ORGANIZING DEPARTMENT	908,746			
MEMBER GOVERNANCE	546,608			
TRAINING	160,409			

Identifier	Return Reference	Explanation
Form 990, Part VI, Section B, line 11		PRIOR TO FILING, THE IRS FORM 990 WILL BE REVIEWED BY THE FINANCE COMMITTEE

Identifier	Return Reference	Explanation
Form 990, Part VI, Section B, line 12c		Each year there is a disclosure statement that each board member and employee is required to complete In addition, activities that could cause a conflict of interest are monitored by the Ethics code compliance officer/liason at the local level and by the the ethics ombudsman at the national level

Identifier	Return Reference	Explanation
Form 990, Part VI, Section B, line 15		The organization's board of directors determines the compensation of the executive director by review ing the compensation around the same time as w hen staff union contracts are ratified The executive director is responsible for setting the compensation for all employees of the union The executive director has the ability to delegate this responsibility to a bargaining committee w hich includes tw o board member and three management staff

Identifier	Return Reference	Explanation
Form 990, Part VI, Section C, line 18		UPON REQUEST BY A MEMBER OF THE ORGANIZATION, REVIEW OF THE REQUESTED DOCUMENT IS ARRANGED WITH THE FINANCE DIRECTOR

Identifier	Return Reference	Explanation
Form 990, Part VI, Section C, line 19		NO DOCUMENTS AVAILABLE TO THE PUBLIC