



Committee *for the* FUTURE

Progress Report | July 2015

What will the legal and political terrain look like for workers in Oregon?
How will these changes impact our ability to win?
How do we need to change to become even stronger?

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FORGING A NEW PATH

What will the legal and political terrain look like for workers in Oregon in 2016? in 2020?

How will these changes impact our ability to win?

How do we need to change to overcome these challenges and become even stronger?

These are the fundamental questions guiding the creation and work of the Committee for the Future (CFF).

Established by General Council -- our local's highest governance body -- at its regular session in 2014, CFF is charged with evaluating the various threats our union is facing and developing specific proposals for how we can adapt and thrive in a changing world. While making hard choices associated with the financial impact of the US Supreme Court's Harris vs Quinn decision, General Council delegates concluded that a member "study committee" needed to delve deeply into our strategies for winning and the ways in which we operate in order to ensure that our union -- such an important vehicle for working Oregonians -- will continue to thrive.

This Interim Report reflects the discussions that have taken place to date by the committee. The purpose of the report is to gather further feedback from leaders and activists before the committee makes its final recommendations in the summer of 2015. Once the committee's work is completed, some of its recommendations may be implemented administratively, via Board action or—should the changes involve amending our union's bylaws—by a vote of our union's General Council.

Committee for the Future members were appointed by the President and confirmed by the Board of Directors.

A Changing World for Workers and Our Unions



Every day, SEIU 503 members experience change, in our jobs and in our communities. While many of these changes are exciting and provide opportunities, many also present serious challenges for every individual and institution in our society:

- Economic inequality is at a record high and continues to grow, threatening our economic security and democracy
- Only 11% of US workers are members of unions
- Changes to the ethnic and generational makeup of the workforce
- A growing list of languages spoken on the job and in our communities
- New technology is impacting how and where we do our work, and how the economy is structured
- Global climate change is creating new pressures on resources

Unprecedented legal and political attacks

To say that unions and workers are “under attack” is a bit of a cliché, but only because it’s been so true for so long. As long as workers have come together to exercise their voice, powerful interests have endeavored to weaken our organizations. Yet while the number of US workers in unions has continued to fall over the last forty years, public sector workers have been somewhat insulated from the kind of sophisticated (and at times brutal) attacks launched by private-sector employers.

Now that anti-union forces have largely neutered the private-sector labor movement, the public sector has been increasingly targeted. This work is being led by organizations such as the National Right to Work Committee and the American Legislative Exchange Council, and is funded

in large part by donations from billionaires like the Koch brothers and the Walton family (owners of Walmart). They have focused on state- and local-based legislative action, and on a robust legal strategy aimed at getting as many cases as possible to the currently receptive conservative Supreme Court majority.

In 2011, Wisconsin, the birthplace of public sector unionism, saw Governor Scott Walker and his legislative majorities pass bills that specifically targeted public service workers, stripping them of the right to bargain over most issues, unilaterally reducing or eliminating benefits that workers had fought for over decades, and crippling unions by ending fair share fees and payroll deduction of dues. And in 2012, both Michigan and Indiana adopted “right-to-work” laws, meaning that in both the public

and private sector, union members are forced to pick up the costs of representation for workers who choose not to join the union.

In Oregon, there is a long history of these types of initiatives — initiatives that working people have joined together to narrowly beat back. In 2014, we barely avoided having a right-to-work measure on the November ballot; however, deep-pocketed anti-worker forces have already filed multiple ballot measures for 2016 that would make Oregon “right-to-work.”

US Supreme Court: Knox, Harris, and Abood

With a majority of justices firmly in the conservative camp, the National Right to Work Foundation’s strategy has been to move as many cases through the courts as possible in order to increase their

likelihood of getting before the Supreme Court—and they have been successful at many turns.

In 2012, the Knox decision severely eroded what non-members can be charged as part of paying their fair share for union-won benefits they receive. Activities that used to be “chargeable,” such as political lobbying for wages and benefits, are now deemed to be activities that fair share payers do not have to contribute to. In their decision, the majority of justices invited further challenges to the long-standing framework of fair share payments.

They didn’t have to wait long. In January 2014, the Supreme Court heard arguments in Harris vs Quinn, a case that challenged the fair share system for independent homecare providers in Illinois. Not only did the Supreme Court deem homecare and childcare workers

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Nursing Home Workers

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Dayton
Adult Foster Homes

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Michael Hohman
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A CHANGING WORLD FOR WORKERS AND OUR UNIONS, CONT.

to be “quasi-public sector workers,” it threw out fair share provisions for these workers and put fair share for all public workers squarely on the chopping block. Writing for the majority, Justice Samuel Alito decried the 1977 Abood ruling which first upheld public sector fair share provisions as “an anomaly” and a “significant impingement on First Amendment rights” based on “unsupported empirical assumptions.”

Not only did the Supreme Court make half of our union—25,000 homecare, childcare, and adult foster care workers—“right-to-work,” it signaled its readiness to do so for state, higher education and local government workers as well. Anti-union forces and the courts appear ready to throw out the long-standing “deal” that formed the basis for 20th century unionism and the underpinning of the middle class: Everyone benefits from union-negotiated raises, benefits, and working conditions; in exchange, everyone should pay their fair share for costs associated with those efforts.

“What do all these changes mean for me and my union?”

Based on the above, the Committee for the Future sees these developments in the near future:

How we win is changing: As fewer workers are able to join together in unions, and those unions that survive are seeing their rights restricted, collective bargaining is far less powerful than it once was. While continuing to utilize collective bargaining, we must also develop other models for uniting and harnessing our power.

Local 503 will be an “all voluntary” membership union within a few years at most. Whether through legislation, and initiative, or judicial action, we cannot plan for the future based on a system of fair share payments.

We will have fewer financial resources. While there are many fair share payers who simply need to be asked to join or have their questions answered, we know there are others who will opt out of paying their fair share at the first opportunity afforded them, and the loss of their contributions will impact our organization.

Based on these impacts, the Committee for the Future developed a process to generate and evaluate ideas and strategies that will ensure a solid future for our union.

Committee Process

To date the Committee for the Future has had three day-long meetings and done work outside of these meetings as well:

1. Researched our changing environment: We studied many of the trends and developments identified in earlier sections of this report. We also looked at union expenditures and a time study showing how we and other leaders are spending our “union time,” wondering how much or little of this time is really oriented towards building and exercising power.
2. Conducted member interviews: We conducted dozens of interviews of both members and non-members, gathering a better sense of how they see their jobs changing, and why they do (or don’t) become involved in our union or in other organizations.
3. Conducted organizational interviews: Augmenting our process, a committee of 503 staff members developed a list of organizations and conducted either research or direct interviews with leaders in those groups. Most of the organizations are voluntary organizations, and the questions focused on how those organizations incentivize membership, govern themselves, and build power.
4. Purpose: We started with a discussion of our organization’s purpose, based on our shared vision of a just and vibrant society.
5. Core questions: We sought to organize our discussions around these core questions.
 - How do we continue to win in a changing environment?
 - How should we be organized internally to do this work?
 - What should our organizational culture that supports winning be?
6. Brainstormed criteria, concepts, and proposals: From here we moved on to the brainstorming and development of ideas for how our work and organizational culture needs to change.
7. Prioritizing ideas: In our third meeting, we spent time discussing, grouping, and prioritizing proposals.

Going forward, we hope this report and accompanying discussions will provide us with feedback on where we are headed.

In our fourth meeting, we will review feedback given and make decisions as to what will be in the Committee for the Future’s final report to the Board of Directors and the General Council.

How have we developed and evaluated ideas?

Given that how we win is changing, that we expect to be an all-voluntary membership union, and that our resources will be reduced as a result, we focused on developing ideas that aligned with as many of these imperatives as possible.

We believe we must:

1. Increase and incentivize membership in our union, and improve engagement with current members.
2. Expand member ownership over the internal organization of our union, reducing reliance on staff for many functions.
3. Update our internal governance of our union to make it less costly and more accessible to more members.
4. Develop strategies to increase revenue and more wisely spend those resources.
5. Grow our coalition work with outside organizations and individuals, building on our Fair Shot campaign work.
6. Develop a more inclusive, participatory and effective organizational culture that enables this work to happen.

Ideas Under Consideration

Following is a list of the top ideas being considered under each of the main categories. Many of these ideas do not fit neatly in one category or another but for the sake of reporting are listed here under the main criterion they satisfy.

INCREASING AND INCENTIVIZING MEMBERSHIP IN OUR UNION AND IMPROVING ENGAGEMENT WITH CURRENT MEMBERS

Currently, half of our union is not covered by fair-share provisions, and we expect state, higher ed, and local government workers to soon fall under this framework as well. We focused our discussion in this area on the need to expand the pool of possible members, as well increasing the reasons for someone to become and remain a member.

Expand Membership: The concept that someone can only become a member of a union if their employer has agreed to recognize the union as the exclusive representative and has negotiated a collective bargaining agreement (CBA) is a relatively modern practice in the history of the labor movement. For most of the American labor movement, workers who committed to supporting the efforts of the union and paying dues were welcomed into its ranks, thus making the union more of a community-based organization with a focus on an industry or sector. This helped make the union less susceptible to attack as a “special interest.”

The concept would be to create a new membership category for people not covered by a CBA. This was by far the most popular concrete idea that the committee discussed, in part because it addresses many of the criteria we set for ideas: it increases membership, would provide greater resources,

increases our ties to the community and advances a more inclusive culture. There are already precedents for membership status not covered by a Local 503-negotiated CBA: retirees and Local 503 staff are allowed to be members of our union. General Council would need to determine membership rights and responsibilities, dues and other governance issues.

Support for building power in our industries, beyond just collective bargaining: A common theme of our discussions was that we need to remain committed the power of workers in our core industries—public and publicly funded services—but acknowledge that collective bargaining cannot be our only tool to accomplish this. For example, how can we build power for long-term care workers, such as our homecare members, when the vast majority of workers in this sector are non-union and work for private employers and in the “grey market?” We must explore organizing these workers in traditional and non-traditional ways, including expanding membership, building non-union worker alliances, partnering with advocates to improve conditions, and through other channels yet to be determined.

Promote, and explore expanding, Member Benefits offerings: While we hope that many members will join and remain part of our union because they view it as a way to build their own power to make change, we recognize that member benefits are at times a primary reason someone may become a member. While we have a relatively robust program now, could it be expanded? What more can we be doing to promote these benefits—and explain their connection to membership status?

Explore putting the grievance and arbitration procedure into the law: One common question that is raised when the possibility of losing fair share comes up is whether we still have to represent non-members. Under current law, the answer is yes. We discussed the possibility of amending the law to end the framework of “exclusive representation” (meaning our union represents everyone in the bargaining unit), but identified many major downsides to such an effort. An alternative idea would be to place the grievance and arbitration procedures into state statutes (as they are in limited ways for non-represented state workers) and then a union would only represent members through this process. This would have major implications for contract enforcement and could only be done in concert with other public sector unions in the state, so much more research and discussion needs to occur.



EXPANDING MEMBER OWNERSHIP OF THE PROGRAM; REDUCING RELIANCE ON STAFF

Given the anticipated budget impacts of losing fair share in the public sector, how do we make sure that we are prepared to continue to build internal power even with less staff support? How can our bargaining, representation, and internal governance be less reliant on staff resources and more in the hands of member leaders?

Support for longer contracts: It's often the case that by the time we finalize, ratify, and print an agreement it's less than a year before we start the whole process all over again. And while many members get engaged through contract campaigns, a default cycle for state contracts of two years need not be the norm; in fact, two-year agreements are not the norm across the country, including in our own union. Many Local 503 nursing home, local government, and private non-profit agreements span from three to five years. Having more time between negotiations would allow for more worksite and issue-based organizing, and for engaging members in other efforts such as lobbying and organizing.

Empowering sublocals: Following up on a debate that we had during the regular meeting of General Council in 2014, we discussed the idea of making internal organizing goals a requirement—and not merely a recommendation—of sublocal leadership. Whether it's leading issue fights, signing up members, or leadership expansion and succession, the consequences of failure are too great to leave to

chance.

Training for more empowerment: We discussed how we need to make more explicit the goal of having member leaders “owning our union” in their worksite or area. For example, training stewards on settling grievances at lower levels, and improving and centralizing trainings on conducting meetings with decision-makers, whether they be labor-management meetings, policy workgroups, or informal discussion.

Adopting electronic voting where possible: Building a system for voting by email or other means, where permissible by law, would reduce the costs of many elections and would very likely lead to higher rates of participation. It would also reduce reliance on staff in many cases for administering these votes. We would need to be careful to comply with Department of Labor regulations (or lack thereof), as well as protecting member privacy.

Steward elections: The dynamic where a worksite steward is elected by a very, very small percentage of the workforce and therefore does not actually speak for the group was discussed. We are considering recommendations that would require stewards to get a minimum number or percentage of votes from workers in their worksite or area before being certified.



MAKING UNION GOVERNANCE MORE ACCESSIBLE AND LESS COSTLY

Our democratic decision-making is essential to who we are, and is one of the most valued aspects of our union culture. As with any complex organization, the structures and processes that we adopt can at times be very costly, confusing to members who are new, and/or inaccessible to those with limited time to contribute. On the flip side, many of our most active members spend the vast majority of their time engaged in governance, including board meetings, committee meetings, General Council sessions, and more.

We also identified that internal union governance, while incredibly important, does not build power or put pressure on employers or decision-makers. So our goal would be to look for ways in which we can reduce the cost of some of our processes and structure them in such a way that more members can engage.

Purpose Statement Revision: There was consensus that the primary clause of our current purpose statement—“The Union is a labor organization established to represent and work for the benefit of employees on matters of employment relations”—is not very inspiring, identifies “the union” as an outside institution, and focuses too narrowly on “employment relations.” A subcommittee is drafting a recommended revision that addresses these issues.

A robust discussion of the pros and cons of sublocals is needed: There was considerable discussion about the impact of sublocals on our ability to win, resources, and internal culture. While there was broad agreement that there are many benefits to the sublocal structure, the committee acknowledged that there are some problems.

For example, sublocals can create the false and harmful impression that they are separate organizations and lead to a perception that our union,

SEIU Local 503, is a foreign entity. Secondly, because of the wonderful diversity and size of our union, the costs and complexity of administering finances and elections of these bodies are vast. Finally, because sublocals have a great deal of autonomy, there is much variation in their effectiveness in terms of building membership, engaging members in action, and even in filling elected positions. While some argued for the elimination of sublocals, that was not the consensus opinion.

We still feel that there needs to be a careful and honest consideration of the pros and cons of the sublocal structure, and an effort to address negative impacts. Could smaller, less active sublocals be combined into one? How can the true cost of administering the sublocals be reflected in their rebate structure? How can we ensure accountability to the broader union for resources allocated and spent? How can local elections be conducted in a way that makes them less resource and time-intensive? This will need to be an ongoing conversation among our members.

Retiree membership: Should we incorporate into our membership form a continuation of membership even after someone retires? Should we seek to change PERS rules so that retiree members can pay their dues through pension payment payroll deductions?

Governing docs review: Given the number of changes that have been made to the various union governing documents over the years, together with those now being contemplated, we felt it would be useful for a committee to be established to conduct a review and rationalization of the documents. This should include an analysis of the cost and benefits of standing committees with recommendations as to whether they should continue.



IDEAS UNDER CONSIDERATION, CONTINUED

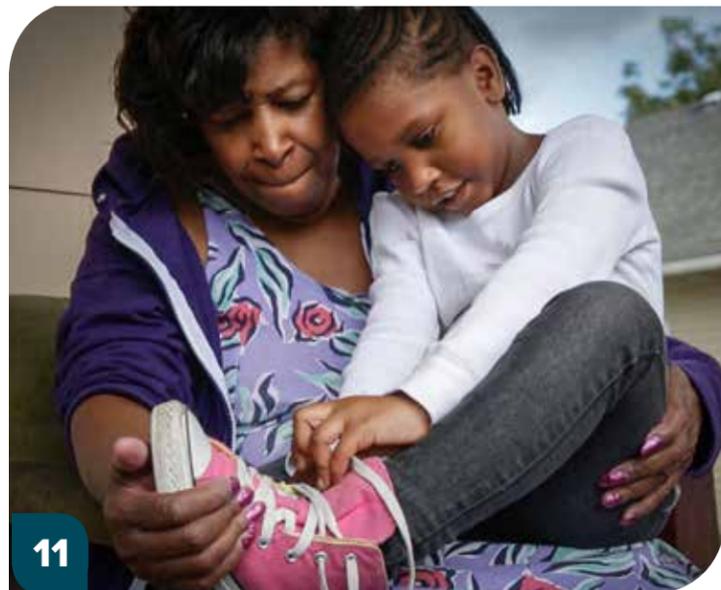
INCREASING REVENUE AND MORE WISELY SPENDING RESOURCES

Reduce costs on mileage: Our union spends considerable amount of money reimbursing for mileage for members driving to meetings. Sometimes, the amount of the mileage reimbursement is equal to or less than the cost of staff time required to process the check. While many members could not attend meetings without advances or reimbursement, it is also true that some members don't necessarily need their reimbursements. One idea is to end reimbursement for local trips under a certain number of miles, and to encourage those who can afford to do so to forgo mileage reimbursement.

Reduce costs on food: Member meetings and conferences frequently lead to major expenses for food. While much has been done to cut back on these expenses (for example, not paying for dessert or soda), we feel it is worth more effort to rein in costs. For example: when possible, meetings should be scheduled so as not to necessitate providing meals. More efficiently run meetings (with a clear purpose, outcomes and agenda) can be done in shorter timeframes, leading to less need for food and less time in meetings. Lastly, potlucks should be encouraged both to save money as a way to share each others' cultures and traditions.

Reduce conference frequency and budget: Some work has already been done in this regard; for example, the Women's and Stewards' conferences. Another possibility is to eliminate or modify the September state worker bargaining conference. Currently, the main purpose of this conference (which typically costs between \$30-50,000) is for bargaining delegates to elect their central bargaining team. This election could be conducted by mail ballot, electronically, or even by teletown hall.

Reduce unnecessary bargaining costs: Can bargaining surveys be done on tablets (such as iPad) to increase participation and reduce need for paper surveys? Very often we bargain for nine or more months for a twenty-four month contract, which is very inefficient and can often lead to burnout for bargaining team members and activists. How can we shorten our bargaining timelines? Can more team caucuses make use of conference calls and web-based video chat?



BUILDING POWER WITH COMMUNITY ALLIES

Building on the work done this year with the Fair Shot campaign, we must increase our connection to the broader movement for a just and vibrant society. Applying the concept of a "community bargaining table," we can use our combined power to advocate for laws and budgets that improve our members and all Oregonians' standard of living and equal access to opportunities.

Create an affiliated non-profit organization that could tap into grants and other resources, and develop new programs that link SEIU members, clients, and the broader community around shared interests. This may provide avenues to engage members who are not necessarily motivated by bargaining or contract enforcement.

Open up some events to allies: Could our trainings and even some of our conferences be made available to individuals from allied organizations? Perhaps for a small fee?

Develop our public image: We discussed the need to invest in the development of our public image and communications plan. This starts with having campaigns that feature and resonate with people outside our union.

Staff this work appropriately: Across the board, if we value it, we assign staff resources to make it happen. While we recognize resources will be even more strained in the future, we need to reassess, and likely grow, how much we spend on this key area of work.

IDEAS UNDER CONSIDERATION, CONTINUED

DEVELOPING A MORE INCLUSIVE, PARTICIPATORY, EFFECTIVE CULTURE

Many of the changes we discussed will not be possible unless we make conscious efforts to change how we treat one another in the ways that we articulate our shared values. The committee discussed the various strong points of Local 503's culture: We feel we are activist, creative, bold, respecting of dissent, democratic, determined, committed. At the same time, we identified challenges in how open, welcoming and effective our culture is, which these five themes seek to address:

Stop the "Us vs. Them:" Attitude is important to a welcoming and inclusive environment. The way we treat each other should not create polarization, division or disrespect. Too often, internal union discussions break down into a debate over who is the "red-headed step child" or who has "drunk the purple Kool-Aid." At union-wide events, there is often tension when assumptions are made about what someone thinks or how smart they are based on which bargaining unit they come from. We must embrace that we are one union engaged in one struggle together.

Stop third-partying our union: We feel it is critical that we end the tolerance for "the union" being something else (i.e., a third party). When members, leaders, officers and staff talk about "the union" as a foreign body rather than as "us" or "we," it sends a message that our union is something other than what we are: a collection of individuals pursuing common goals. This can be addressed by being conscious of the language we use, referring to "our union," rather than "the union," for example. Each of us can also lead on this issue by resisting the urge, when criticized by a group of members, to turn around and point a finger at "the union."

Organizational Equity and Inclusion (OE&I): We absolutely must incorporate OE&I into our approach to everything; this includes considering lenses such as racial, economic, gender, geographic, generational, linguistic and cultural diversity. For example, when we look around the room in most union meetings and functions, the attendance is typically whiter and older than our membership at large and than demographic trends. While retaining the incredible value of the contributions of current activists, we need to make sure we're making conscious efforts to expand the perspectives and experiences in the room. We must also become more conscious of our use of language that is insular and confusing to newcomers.

"Education to Action:" Without disrespecting the importance of internal governance, we need to lift up action (organizing other workers, lobbying, rallying, phonebanking, etc) as the vehicle that truly builds and exercises power. This will mean engaging all leaders in the core work of signing up non-members, engaging community partners and driving activism in their worksites or neighborhoods. It also means less spending on "purple stuff."

Engage the broader person: As part of our recommendations in other areas, one key way we can engage the broader public is by relating our common struggle, talking about common values and our stories. Similarly, we can do more to make space in our events for the children and other family members who often accompany our members.

ANNIE SMITH, HOMECARE WORKER



I consider us as a family. We are a 503 family regardless of where we work—care provider, state worker, nursing home worker... it doesn't matter when we're unified. Despite the challenges that we face, our future is looking good because we're all in it together!

LATRICIA STRAW, MARION COUNTY



The future of our Union is inclusive! It's not about "us" verses "them." Our Union represents everyone. We all come from different backgrounds, religions, races, sexualities, political views and ideologies, yet we are all In It Together. When we can all come together to debate, process, and collaborate, everyone wins! The union movement is America's past, present, and future. Without it we all suffer. It's the heartbeat of the American worker. Without the heart, the body dies.

DAN SMITH, OREGON STATE HOSPITAL



To ensure the success of SEIU in the future we must maintain our core identity as the leading voice for workers in Oregon. We must prepare for the worst while working to maintain our representation of workers' rights.



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