



# 509 Dashboard

Complete System Documentation

Google Forms Integration, Grievance Management,  
Mobile Access & Member Satisfaction Tracking

SEIU Local 509

Version 2.0

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### Grievance Form

Start a new grievance case (pre-fillable)



### Contact Info Form

Member self-service contact update



### Satisfaction Survey

68-question member satisfaction survey



### GitHub Repository

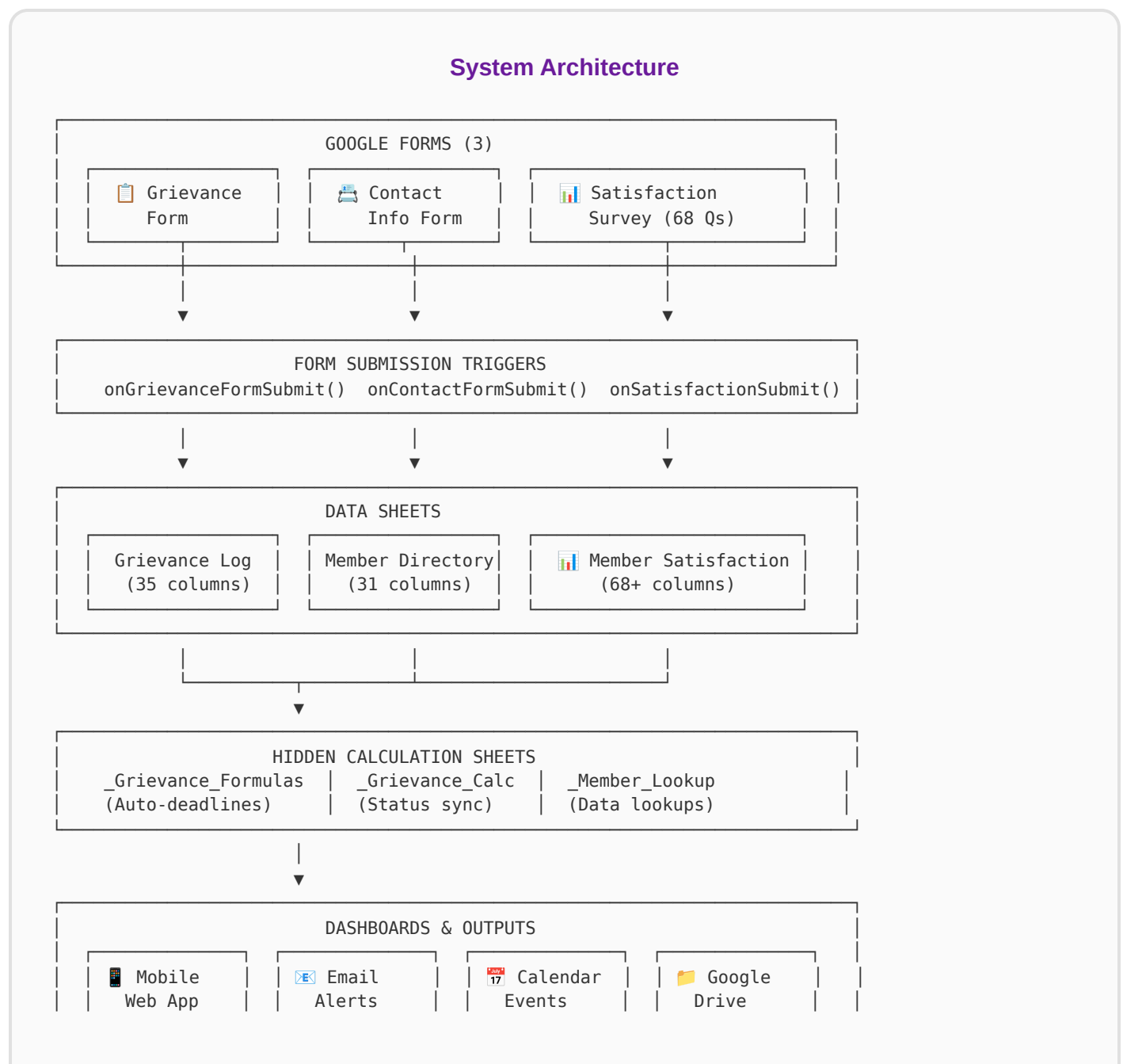
Source code, documentation & releases

**Note:** The Google Spreadsheet URL is specific to your deployment.  
Access it via the deployed web app's Links page or directly from Google Drive.

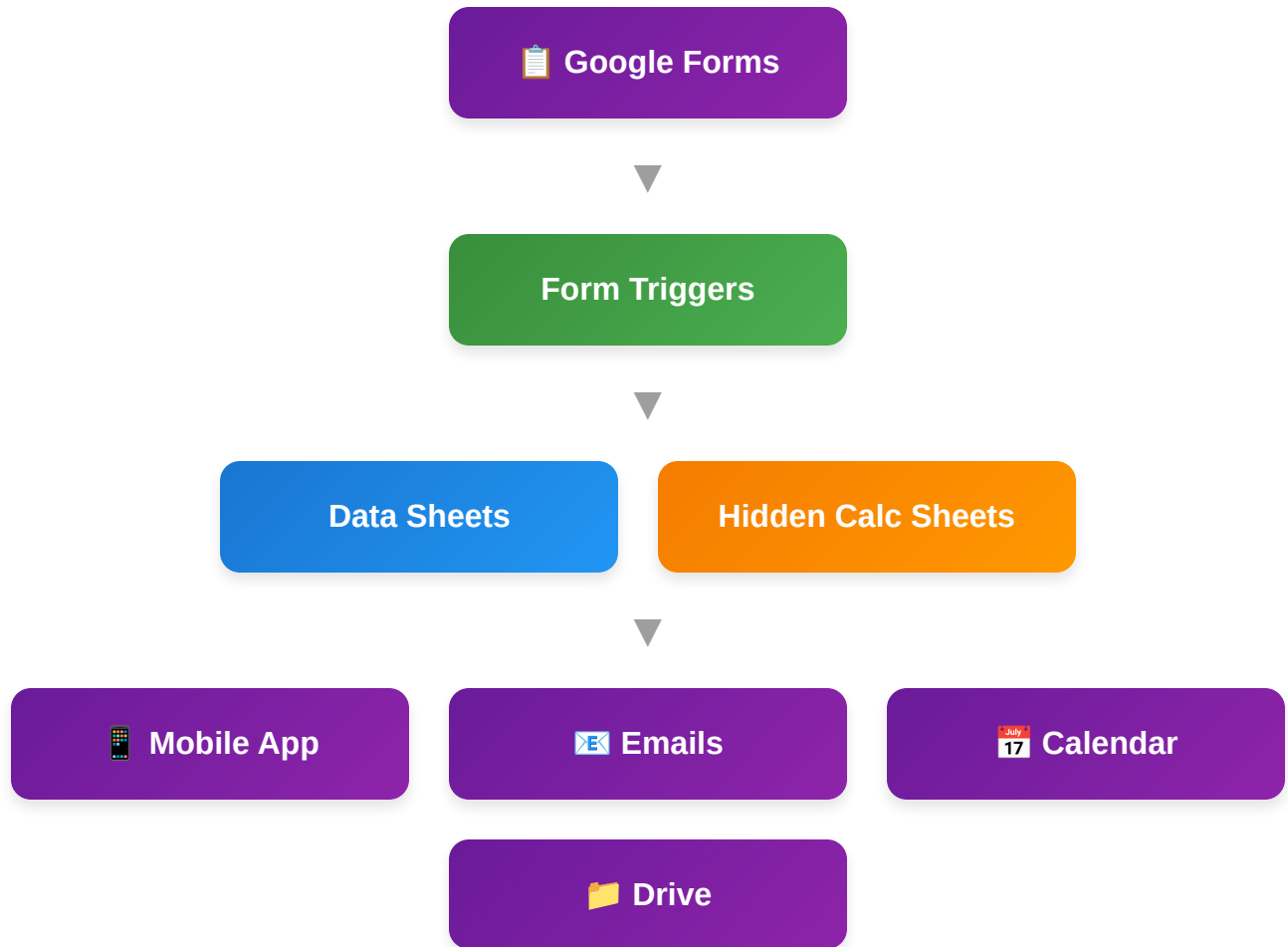
# 1. System Overview

The 509 Dashboard is a comprehensive union member database and grievance tracking system built on Google Sheets with Google Apps Script. It seamlessly integrates three Google Forms with multiple dashboards to provide complete member and case management.

## 1.1 Architecture Diagram



## 1.2 Data Flow



## 2. Google Forms Integration

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Three specialized Google Forms feed data directly into the dashboard system. Each form serves a specific purpose and triggers automated processes upon submission.

### 2.1 Grievance Form



#### Purpose

Initiates new grievance cases with pre-filled member data for accuracy and efficiency.

**Form Link:** [Open Grievance Form ↗](#)

#### How It Works

1

##### Select Member

User selects a member row in Member Directory and clicks "Start New Grievance" from menu

2

##### Form Pre-fills

System extracts member data and opens form with fields pre-populated: Name, ID, Email, Job Title, Location, Steward info, etc.

3

##### User Completes Form

User fills remaining fields: Date of Incident, Articles Violated, Remedy Sought, Step level

4

##### Automatic Processing

On submit: New row added to Grievance Log, deadlines auto-calculated, Drive folder created, Member Directory updated

## Pre-filled Fields

Field Category	Fields Included
Member Info	Member ID, First Name, Last Name, Job Title, Email
Location	Agency/Department, Region, Work Location
Management	Manager(s), Supervisor
Steward Info	Steward First/Last Name, Steward Email

## 2.2 Contact Info Form



### Purpose

Allows members to self-update their contact information, keeping the directory current without manual data entry.

**Form Link:** [Open Contact Info Form ↗](#)

## Fields Collected

Category	Fields
Identity	First Name, Last Name, Job Title, Unit
Location	Work Location, Office Days (multi-select)
Contact	Email, Phone, Preferred Communication Methods, Best Times
Management	Supervisor, Manager
Engagement	Interests (Local/Chapter/Allied actions)

**Smart Update:** On submission, the system checks if the member exists. If found, it updates their record. If new, it creates a new member entry.

## 2.3 Satisfaction Survey Form



### Purpose

Comprehensive 68-question member satisfaction survey covering all aspects of union representation and member experience.

**Form Link:** [Open Satisfaction Survey ↗](#)

### Survey Sections (11 Total)

Section	Questions	Focus Area
Work Context	5	Demographics and work environment
Overall Satisfaction	4	General union satisfaction (1-10 scale)
Steward Ratings	7	Steward effectiveness and responsiveness
Steward Access	3	For members without steward contact
Chapter Effectiveness	5	Local chapter performance
Local Leadership	6	Leadership accessibility and communication
Contract Enforcement	5	Contract knowledge and enforcement
Representation	4	For members who filed grievances
Communication	5	Information flow and updates



Member Voice	5	Input opportunities and responsiveness
Value & Action	5	Perceived value and engagement
Scheduling	8	Meeting times and availability
Priorities & Close	5	Top priorities and open feedback

## 3. Dashboard Components

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### 3.1 Member Directory

Central repository for all member information with 31 columns tracking contact details, engagement, and grievance status.



#### Member Info

- Member ID (auto-generated)
- Name, Job Title, Unit
- Email, Phone
- Work Location



#### Engagement Tracking

- Meetings attended
- Volunteer hours
- Surveys completed
- Interest areas



#### Grievance Snapshot

- Has Open Grievance? (Yes/No)
- Current Grievance Status
- Days to Next Deadline

**Auto-Sync Feature:** Columns AB-AD automatically update from the Grievance Log via hidden calculation sheets, showing each member's current grievance status at a glance.

### 3.2 Grievance Log

Complete grievance lifecycle tracking with 35 columns covering all steps from filing through resolution.

### Key Column Groups

Group	Columns	Purpose
Identification	A-D	Grievance ID, Member ID, Names
Case Details	E-G	Incident Date, Articles, Remedy
Step Tracking	H-R	Dates filed/received for Steps I, II, III
Calculations	S-U	Days Open, Next Due, Days to Deadline
Resolution	V-Y	Status, Outcome, Resolution Details
Communication	AC-AF	Message Alert, Coordinator Message, Acknowledgment
Documents	AG-AH	Drive Folder ID and URL

## 3.3 Member Satisfaction Dashboard

Accessed via menu:  **509 Dashboard** >  **Member Satisfaction**



#### Overview Tab

- Total responses count
- Average satisfaction score
- NPS (Net Promoter Score)
- Response rate percentage
- Auto-generated insights



#### Responses Tab

- Searchable response list
- Filter by satisfaction level
- Individual response details
- Demographic breakdown



### By Section Tab

- Bar chart of all 11 sections
- Ranked by average score
- Section detail cards
- Trend indicators



### Insights Tab

- Worksite breakdowns
- Role-based analysis
- Steward contact impact
- Top member priorities

# 4. Grievance Features


## 4.1 Automatic Date Calculations

All grievance deadlines are automatically calculated based on union contract rules using formulas in hidden sheets.

### Deadline Calculation Rules

Deadline Type	Formula	Default Days
Filing Deadline	Incident Date + X days	21 days
Step I Decision Due	Date Filed + X days	30 days
Step II Appeal Due	Step I Decision Received + X days	10 days
Step II Decision Due	Step II Appeal Filed + X days	30 days
Step III Appeal Due	Step II Decision Received + X days	30 days


### Auto-Calculated Fields



Days Open

TODAY() - Date Filed

Auto-updates daily. Shows total days since grievance was filed (or total duration if closed).



Next Action Due

Intelligent selection based on current step

Automatically shows the most relevant upcoming deadline for the grievance's current stage.



### Days to Deadline

Next Action Due - TODAY()

Countdown to deadline. Negative values indicate overdue status.

**Customizable:** Default deadline days can be modified in the Config sheet to match your specific contract requirements.

## 4.2 Due Date Alerts

### Visual Heatmap Indicators

The Days to Deadline column uses color-coding for instant status recognition:



Overdue or 0 days



1-3 days remaining



4-7 days remaining



8+ days remaining

### Email Alert System

Alert Type	Recipient	Trigger
Deadline Notifications	Configured recipients	Grievances within 3 days of deadline
Steward Alerts	Individual stewards	Their assigned cases within 7 days
Test Notifications	Current user	Manual trigger for testing

## 4.3 Coordinator Message System

A built-in communication system allowing grievance coordinators to send alerts to stewards directly within the Grievance Log.

## Message Alert Columns

Column	Field	Purpose
AC	MESSAGE_ALERT	Checkbox - checked when coordinator has a message
AD	COORDINATOR_MESSAGE	Text field for the coordinator's message
AE	ACKNOWLEDGED_BY	Steward name who acknowledged the message
AF	ACKNOWLEDGED_DATE	Date/time when steward acknowledged

## Workflow

### 1 Coordinator Checks Box

Coordinator checks the MESSAGE\_ALERT checkbox (column AC) to flag the grievance

### 2 Coordinator Writes Message

Types message in COORDINATOR\_MESSAGE column (AD) explaining what needs attention

### 3 Steward Sees Alert

Steward notices the checked box (visually highlighted) and reads the message

### 4 Steward Acknowledges

Steward enters their name in ACKNOWLEDGED\_BY and the date in ACKNOWLEDGED\_DATE

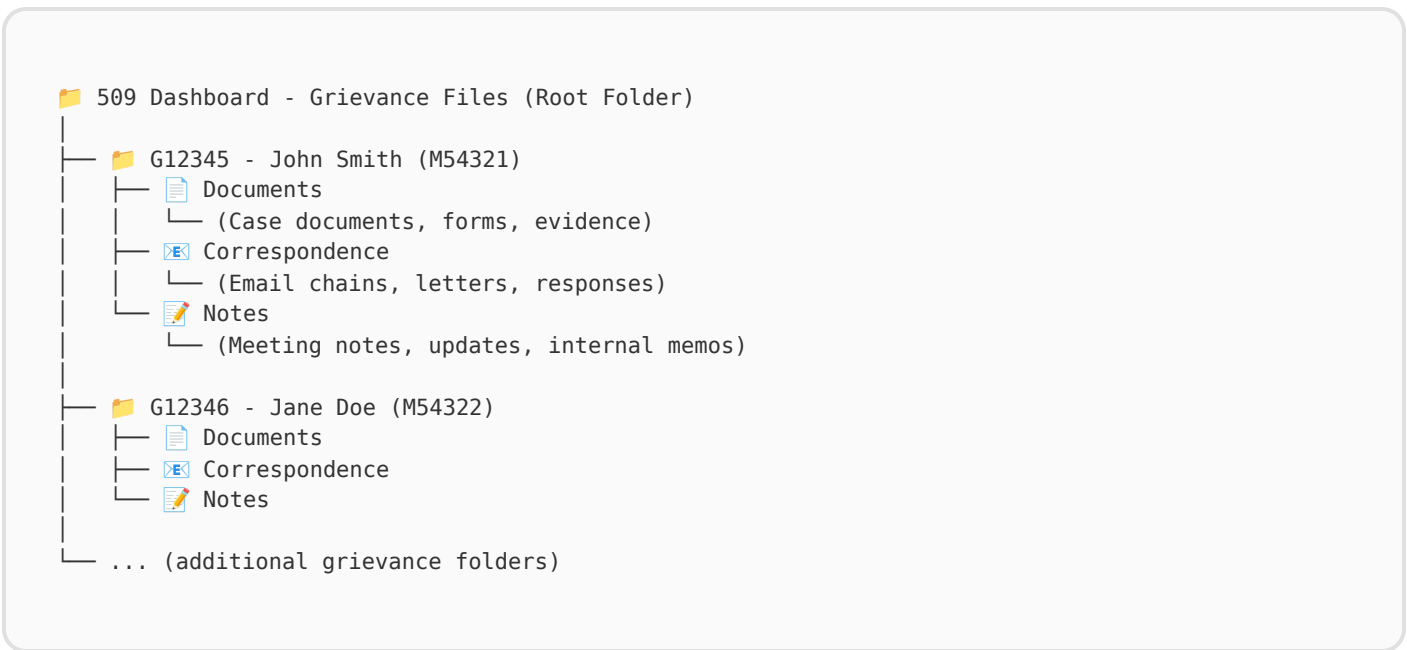
**Audit Trail:** This system creates a documented record of coordinator-steward communication within each grievance case.

# 5. Integrations

## 5.1 Google Drive Integration

Each grievance automatically gets a dedicated Google Drive folder for organizing case documents.

### Folder Structure



### Automatic Features


Feature	Description
Auto-Creation	Folder created when grievance form is submitted or via Quick Actions
Naming Convention	[GrievanceID] - [FirstName LastName] ([MemberID])
Subfolders	Three subfolders auto-created: Documents, Correspondence, Notes
Auto-Sharing	Folder automatically shared with grievance coordinators from Config sheet



Link Storage	Folder ID (col AG) and URL (col AH) saved in Grievance Log
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## 5.2 Google Calendar Integration


Sync grievance deadlines directly to Google Calendar for proactive deadline management.



### Sync Deadlines

Creates all-day calendar events for each grievance deadline


**Event Title:** ⚠️ [GrievanceID] - [Step] Due



### View Upcoming

Shows next 7 days of grievance deadlines from calendar

Displays member names alongside deadline info



### Clear Events

Batch delete all grievance-related calendar events

Useful for cleanup or resync

**Rate Limiting:** Calendar sync includes 100ms throttling between event creations. A warning appears if syncing more than 50 events at once.

## 5.3 Email Integration

Automated and manual email capabilities using Google's Mail API.

### Email Types

Type	Purpose	Trigger
Deadline Alerts	Notify about approaching deadlines	Grievances within 3 days of due date
Steward Notifications	Personalized alerts to stewards	Their cases within 7 days of deadline
Quick Email	Send emails to members	Manual from dashboard
Test Notifications	Verify email system works	Manual trigger

**Sender Name:** All automated emails are sent as "SEIU Local 509 Dashboard" for clear identification.

## 6. Mobile Web App

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### 6.1 On-the-Go Accessibility

The 509 Dashboard includes a fully responsive mobile web application, allowing stewards and coordinators to access critical information from anywhere using their smartphones or tablets.



#### Mobile Optimized

- Responsive design for all screen sizes
- Touch-optimized buttons and navigation
- Safe area support for notched phones
- Fast loading and smooth scrolling

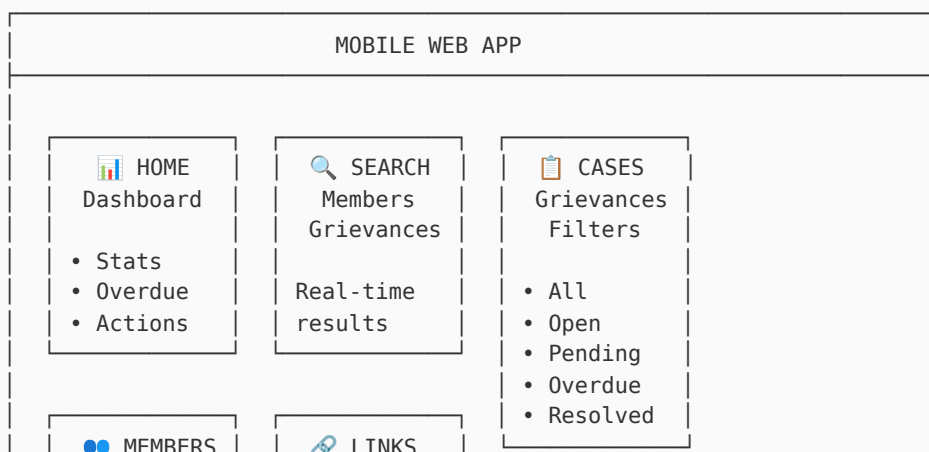


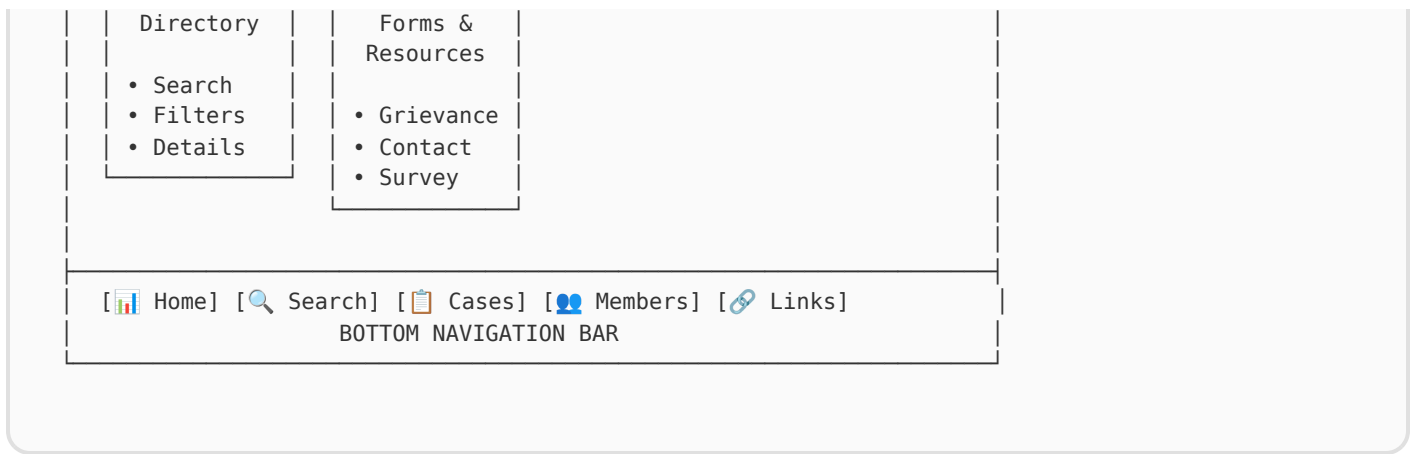
#### Add to Home Screen

- Install as app-like icon on iOS/Android
- Full-screen mode when launched
- Custom app icon
- No browser chrome for cleaner look







### 6.2 Mobile App Pages

#### Mobile Navigation Structure





## Page Details

Page	Features	Use Case
 <b>Dashboard</b>	<ul style="list-style-type: none"> <li>• 6 clickable stat cards (Members, Grievances, Active, Pending, Overdue, Win Rate)</li> <li>• Overdue preview showing top 3 urgent cases</li> <li>• Quick action buttons</li> </ul>	Quick overview at a glance
 <b>Search</b>	<ul style="list-style-type: none"> <li>• Tabbed search (Members / Grievances)</li> <li>• Real-time results as you type</li> <li>• Expandable result cards</li> </ul>	Find specific records quickly
 <b>Cases</b>	<ul style="list-style-type: none"> <li>• Filter buttons: All, Open, Pending,  Overdue, Resolved</li> <li>• Expandable grievance cards with full details</li> <li>• Shows: ID, Member, Step, Dates, Days Open, Steward</li> </ul>	Review and manage grievances
 <b>Members</b>	<ul style="list-style-type: none"> <li>• Search by name</li> <li>• Filter: All, Stewards, With Grievance</li> <li>• Expandable cards with contact info</li> </ul>	Access member information
 <b>Links</b>	<ul style="list-style-type: none"> <li>• Direct links to all 3 Google Forms</li> <li>• Link to main spreadsheet</li> <li>• Additional resources</li> </ul>	Quick access to forms and tools

## 6.3 Deployment

### 1 Open Apps Script

Go to Extensions → Apps Script from the spreadsheet

### 2 Deploy

Click "Deploy" → "New deployment" → Select "Web app"

### 3 Configure Access

Set "Execute as" to your account, "Who has access" to your organization




### 4 Share URL

Copy the web app URL and share with stewards/coordinators

**Pro Tip:** Users can add the web app to their phone's home screen for instant access. On iPhone, tap Share → Add to Home Screen. On Android, tap Menu → Add to Home Screen.

# Quick Reference Summary



## Forms → Dashboards Flow

Form	Destination	Dashboard
 <a href="#">Grievance Form ↗</a>	Grievance Log	Mobile App Cases, Interactive Dashboard
 <a href="#">Contact Info Form ↗</a>	Member Directory	Mobile App Members, Interactive Dashboard
 <a href="#">Satisfaction Survey ↗</a>	Member Satisfaction Sheet	Satisfaction Dashboard (4 tabs)







## Key Automations

Feature	What It Does
Deadline Calculations	Auto-calculates all step deadlines from dates entered
Days to Deadline	Live countdown updated daily
Member Grievance Sync	Member Directory shows current grievance status
Drive Folders	Auto-created with subfolders, auto-shared with coordinators
Email Alerts	Notifications for approaching deadlines
Calendar Events	Deadline events synced to Google Calendar

## Access Points

Interface	Access Method	Best For
Google Sheets	Direct spreadsheet access	Data entry, detailed editing
Interactive Dashboard	Menu →  509 Dashboard	Desktop overview and quick actions
Mobile Web App	Deployed URL (add to home screen)	On-the-go access from any device
Satisfaction Dashboard	Menu →  Member Satisfaction	Survey analysis and insights




## All Links & Resources

Resource	URL	Purpose
 <b>Grievance Form</b>	<a href="#">Open Form ↗</a>	Start new grievance cases
 <b>Contact Info Form</b>	<a href="#">Open Form ↗</a>	Member contact updates
 <b>Satisfaction Survey</b>	<a href="#">Open Survey ↗</a>	68-question member survey
 <b>GitHub Repository</b>	<a href="#">View on GitHub ↗</a>	Source code, releases, issues
 <b>Google Spreadsheet</b>	<i>Unique to each deployment</i>	Access via deployed web app Links page
 <b>Mobile Web App</b>	<i>Deployed URL from Apps Script</i>	On-the-go access (add to home screen)

### GitHub Resources Available:

- **Source Code** - All .gs files for Google Apps Script
- **Documentation** - README, setup guides, workflow guides

- **Issues** - Report bugs or request features
- **Releases** - Version history and changelogs

**Need Help?** Access the built-in documentation sheets:  Getting Started,  FAQ, and  Config Guide within the spreadsheet.