

FORM LM-20

AGREEMENT AND ACTIVITIES REPORT

Form approved
Office of Management
and Budget
No. 1215-0188
Expires 09-30-2011



This report is mandatory under P.L. 86-257, as amended. Failure to comply may result in criminal prosecution, fines, or civil penalties as provided by 29 U.S.C. 439 or 440. Required of persons, including Labor Relations Consultants and Other Individuals and Organizations, Under Section 203(b) of the Labor-Management Reporting and Disclosure Act of 1959, as amended. (LMRDA)

READ THE INSTRUCTIONS CAREFULLY BEFORE PREPARING THIS REPORT.

469766

1. File Number: C- 00525

Person Filing

2. Name and mailing address (include ZIP Code):

Name

Title

Organization LRI Consulting Services Inc

P.O. Box, Bldg., Room No., if any

Street 7850 South Elm Place, Suite E

City Broken Arrow

State Oklahoma

ZIP Code + 4 74011

3. Any other address where records necessary to verify this report are kept:

Name

Title

Organization

P.O. Box, Bldg., Room No., if any

Street

City

State

ZIP Code + 4

4. Date fiscal year ends:

Dec / 31

5. Type of person:

a. ☐ Individual b. ☐ Partnership c. ☒ Corporation d. ☐ Other (Specify):

Nature of Agreement or Arrangement

6. Full name and address of employer with whom made (include ZIP Code):

Name

Organization Trillium Family Services

Trade Name, if any

P.O. Box, Bldg., Room No., if any

Street 3315 SE Powell Boulevard

City portland

State Oregon

ZIP Code + 4 97202

7. Date entered into:

10 / 17 / 2011

8. Name of person(s) through whom made:

Name Kim Scott

Name

Name

Name

Name

Signatures

Each of the undersigned declares, under penalty of perjury and other applicable penalties of law, that all of the information submitted in this report (including the information contained in any accompanying documents) has been examined by the signatory and is, to the best of the undersigned's knowledge and belief, true, correct, and complete. (See Section VII on penalties in the instructions.)

13. Signed

President
(If other title, see
instructions)

Title President

14. Signed

Treasurer
(If other title, see
instructions)

Title Treasurer

On

11-16-11
Date

918-455-9995
Telephone Number

On

11-16-11
Date

918-455-9995
Telephone Number

Filer: LRI Consulting Services Inc	File Number C- 00525
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9. Check the appropriate box to indicate whether an object of the activities undertaken, is directly or indirectly:

a. ☒ To persuade employees to exercise or not to exercise, or persuade employees as to the manner of exercising, the right to organize and bargain collectively through representatives of their own choosing.

b. ☐ To supply an employer with information concerning the activities of employees or a labor organization in connection with a labor dispute involving such employer, except information for use solely in conjunction with an administrative or arbitral proceeding or a criminal or civil judicial proceeding.

10. Terms and conditions (Explain in detail; see instructions. Written agreements must be attached.):

see attached

Specific Activities to be Performed	
11. For each activity, separately list in detail the information required (See instructions):	
a. Nature of activity: Engaged to communicate to employees regarding exercising their rights to organize and bargain collectively.	
11.b. Period during which performed: various days beginning 10/17/11	11.c. Extent performed: Fully Performed
11.d. Name and address through whom performed:	Additional Name and address through whom performed, if any:
Name	Name
Organization Clegg & Assoc Management Group	Organization
P.O. Box, Bldg., Room No., if any	P.O. Box, Bldg., Room No., if any
Street 17583 26th Avenue	Street
City Surrey BC V3S0A4	City
State ZIP Code + 4	State ZIP Code + 4
12.a. Identify subject groups of employees: RN's, Treatment Counselors, Child and Family Therapist	12.b. Identify subject labor organizations: Service Employees



LRI Consulting Services, Inc.

phone 800-888-9115
fax 918-455-9998

www.LRIonline.com

PROPOSAL

TO: Kim Scott
CEO
Trillium Family Services
3315 SE Powell Boulevard
Portland, OR 97202

October 17, 2011

503-205-3553
kscott@trilliumfamily.org

SITUATION ASSESSMENT:

You have asked for a proposal to provide communication materials and consulting services to assist with communicating to employees during up coming union election. You want to make sure that your communications are legally sound and provide the best opportunity to build trust with your employees.

PROPOSED INTERVENTION:

We will provide on-site services where our consultant will educate employees about the bargaining process and their legal rights. We will assist you and your legal counsel to develop a complete campaign strategy based on your unique circumstances. In addition, our campaign consultant(s) will speak directly with your employees.

OBJECTIVES:

Our objective is to educate employees without meritorious objections or unfair labor practice charges.

VALUE TO THE ORGANIZATION:

The value to your company includes:

- You receive a proven program, with **over 10,000 successful client engagements**;
- Your communication strategy is **legally proven and sound**. Our communication tools have never been found to be objectionable by the NLRB in thousands of elections;
- You avoid a steep—and slippery—learning curve and are free to do the most important trust-building work. You can talk to employees without engaging in “mud-slinging” – you are free to spend your time on a positive message about the company.

METHODOLOGY AND OPTIONS:

OPTION 1: We will provide expert campaign management with at least one on-site facilitator to communicate your message directly to employees in employee meetings and one-on-one. Our consultant(s) will work with managers and supervisors at your location to increase your own internal capacity for handling employee relations issues after the campaign is over. Based on our joint assessment of the need, we will assign appropriate consulting resources to your campaign for a pre-approved schedule of meetings.

TERMS AND CONDITIONS:

The fee for **OPTION 1** is a project price of \$37,000 inclusive of travel expenses. This fee is due upon the acceptance of proposal.

It is further understood that all materials included in or with the above referenced items or programs are fully covered and protected by federal copyright laws. Federal law provides civil and criminal penalties for the unauthorized reproduction, distribution or exhibition of protected products. Criminal copyright infringement is investigated by the FBI and may constitute a felony penalty of up to five years in prison and/or a \$250,000 fine.

You further acknowledge that no representation by LRI or its representatives were relied on by you or any member of your company in entering this agreement, and that this document represents the full understanding of the parties. You also acknowledge and agree that we have informed you of the obligation to report any direct persuader activity performed on your behalf to the United States Department of Labor by both our firm and your firm and that failure to timely file these reports can subject your company criminal penalties. Your payment, in the absence of your signature below, indicates your acceptance of this project and the terms and conditions as stated herein. The parties agree that Oklahoma law governs

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Labor Relations Institute, Inc.

7850 S. Elm Place - Suite E
Broken Arrow, OK 74011

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any dispute between them and to resolve any disputes by arbitration in Tulsa, Oklahoma under the American Arbitration Association rules. Your payment, in the absence of your signature below indicates your acceptance of this project and the terms and conditions as stated herein.

ACCEPTANCE:

We accept the proposal above and the option:

OPTION 1: _____

For LRI Consulting Services, Inc.

For Trillium Family Services

Phillip B. Wilson
President – General Counsel

October 17, 2011

for Kim Scott
CEO
October 17, 2011

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