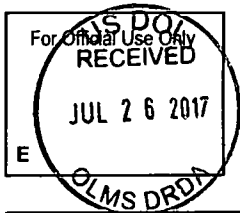


# FORM LM-20

## AGREEMENT AND ACTIVITIES REPORT

Form approved  
Office of Management  
and Budget  
No. 1245-0003  
Expires 03-31-2019



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.

653264

1. File Number:

C-

67719

### Person Filing

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

Name     
Title   
Organization   
P.O. Box, Bldg., Room No., if any   
Street   
City   
State

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

4. Date fiscal year ends:

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   
Trade Name, if any   
P.O. Box, Bldg., Room No., if any   
Street   
City   
State

7. Date entered into:

/  /

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

Name    
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

On

Date

Telephone Number

14. Signed

Treasurer  
(If other title, see  
instructions)

Title

On

Date

Telephone Number

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.):

Per letter agreement entered into on June 12, 2017, a copy of which is attached, Laurel Labor Advisors was retained for the purpose of conducting information meetings with the staff of new Foundations Charter School. The meetings were held on the premises of the school. The fee was an hourly rate for each consultant conducting the meetings.

#### Specific Activities to be Performed

11. For each activity, separately list in detail the information required (See instructions):

a. Nature of activity:

Laurel Labor Advisors was retained to conduct information meetings in June 2017 with the staff of the school for the purpose of persuading the staff to not vote for the union.

11.b. Period during which performed:

June 2017

11.c. Extent performed:

Completed

11.d. Name and address through whom performed:

Name Paul Stadelberger

Organization New Foundations Charter School

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

Street 8001 Torresdale Avenue

City Philadelphia

State Pennsylvania ZIP Code + 4 19136

Additional Name and address through whom performed, if any:

Name

Organization

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

Street

City

State ZIP Code + 4

12.a. Identify subject groups of employees:

Staff including teachers, teaching assistants, nurse and clerical.

12.b. Identify subject labor organizations:

Philadelphia Alliance of Charter School Employees, Local 6058, AFT-PA, AFT, AFL-CIO

# Laurel Labor Advisors LLC

*Advisors to Management in Labor Relations Matters*

June 7, 2017

Mr. Paul Stadelberger  
Chief Executive Officer  
New Foundations Charter School  
8001 Torresdale Avenue  
Philadelphia, PA 19136

Re: National Labor Relations Board (NLRB) Petition Number 04-RC-199928 filed June 2, 2017 by the Philadelphia Alliance of Charter School Employees, Local 6058, AFT-PA, AFT, AFL-CIO.

Dear Mr. Stadelberger,

I am writing in follow up to our conversation yesterday among you, your counsel, Kevin McKenna, and us at Laurel Labor Advisors about the above petition. We discussed the petition you received, some basic strategy and the timing of the pre-election hearing and election. We also discussed how we can be of assistance to you and your labor counsel. We have a meeting with you later today to discuss these issues in greater detail and map out a more specific plan. Please accept this letter as our initial proposal to outline how we may be of assistance subject to greater clarification following our meeting.

## **BACKGROUND**

As we discussed, given the tight time frame posed by the proposed election date coupled with the departure of all faculty members by June 14<sup>th</sup> at the latest we have a finite amount of time to create and implement a campaign to inform New Foundations' professionals about the consequences of joining a union. We recognize that the formal voting unit has yet to be defined but for the purposes of this letter we are using the term "professionals" to mean the final voting unit however that is ultimately constituted.

In addition, procedural changes in 2015 to the NLRB's rules governing the process by which union elections take place have had the effect of considerably shortening the time between the filing of a petition by a union to the actual election date. As a consequence, any information campaign must proceed with urgency.

## **WHAT WE WILL PROVIDE**

For the reasons noted above it will only be possible to conduct a limited number of information meetings each of which is to be attended by all professionals.

The topics we will cover in these meetings will include but not be limited to the following:

- The background and history of the National Labor Relations Act
- The function of the NLRB
- The date of the election, balloting process, importance of voting and how votes are counted
- What happens when unions are voted in and the changed relationship between employer and employees
- How unions work, how are they financed, how they spend their money, how they operate during a campaign and specific information about the union seeking to represent New Foundations' professionals
- What does a union election actually decide
- The collective bargain process
- Strikes, lockouts, impasses and replacement workers

Attending the first meeting will be three Laurel consultants. In our usual practice one consultant makes the formal presentation while the other takes notes and makes observations about how the presentation is being received. This permits us to provide you with a climate survey in real time. Of course, we respond to questions and requests for additional information.

In our usual practice – which we need to discuss with you – the purpose of the third consultant is to afford the opportunity to be introduced to the entire professional group and then be available thereafter for informal “walk arounds” where we are accessible for responding to questions and concerns. In light of the professional development meetings that will be underway at the end of the school year this will be an excellent chance to do this. In short, given the limited time before election and the departure of the professionals on June 14<sup>th</sup>, we should use every chance we have to stay in contact to educate your team about the consequences of the election.

In addition, given that there will some period of time between the last day professionals will be at the school and available for meetings and the election date, we strongly recommend continuing our efforts in writing to all professionals. We will need your guidance on the best way to do this.

We will also participate in strategy meetings as necessary.

**PROFESSIONAL FEE AND EXPENSES**

We propose a fee of \$350 per hour per advisor for the services outlined above payable upon invoice following the election. In addition we request that our reasonable expenses be reimbursed at cost as incurred. We also adhere to the expense reimbursement guidelines of our clients.

In recognition of your status as a charter school we will adjust our normal travel time from actual portal-to-portal to two hours round trip for one advisor.

Thank you for the opportunity to work with you on this critical initiative. We appreciate your confidence in us.

Very truly yours,

A handwritten signature in black ink, appearing to read 'Frank Bellis', with a long horizontal flourish extending to the right.

Frank Bellis  
Principal

Accepted by:

Date:

Paul Stadelberger  
Paul Stadelberger  
Chief Executive Officer

06/12/17