Amended.

U.S. Department of Labor Office of Labor-Management Standards Washington, DC 20210

FORM LM-20 **AGREEMENT AND ACTIVITIES REPORT**

Form approved Office of Management and Budget No. 1245-0003 Expires 08-31-2016



C- 65802

1. File Number:

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.

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Person Filing					
Name and mailing address (include ZIP Code):		3. Any other address where records necessary to verify this report are kept:			
Name		Name .			
Title		Title			
Organization International La	oor Relations	Organization			
P.O. Box, Bldg., Room No., if any		P.O. Box, Bldg., Room No., if any			
Street 8086 South Yale Ave s	uite 225	Street			
City Tulsa		City			
State Oklahoma	ZIP Code + 4 74136	State		ZIP Code + 4	
4. Date fiscal year ends:	5. Type of person:	•			
Dec / 31	a. Individual b. Partnership	c. Corpo	oration d. Other ((Specify):	
Nature of Agreement or Arrangemen	t				
6. Full name and address of employer w	rith whom made (include ZIP Code):	7. Date entered into: 9 / 8 / 2014			
Name		,			
Organization ONTRAC		Name of person(s) through whom made:			
Trade Name, if any		Name Rick Chase			
P.O. Box, Bldg., Room No., if any		Name			
Street 829 Smithway Street		Name			
City Commerce		Name			
State California	ZIP Code + 4 90040	Name			
Signatures					
	er penalty of perjury and other applicable panying documents) has been examined on VII on penalties in the instructions.)				
13. Signed President (If other title, see instructions)		14. Signed			Treasurer (If other title, see instructions)
Title President		Title	Treasurer		
	•				
	0-555-7509	On	12/01/2015	800-555-7509	
Date	Telephone Number		Date	Telephone Number	

Filer: International Labor Relations	File Number C- 65802		
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.			
	ployees or a labor organization in connection with a labor dispute involving a 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 agreement			
Specific Activities to be Performed			
11. For each activity, separately list in detail the information required (See instruct	ons):		
a. Nature of activity:			
Engaged to communicate with employees so they can metheir rights to organize and bargin collectively.	make an informed decision reguarding exercising		
11.b. Period during which performed:	11.c. Extent performed:		
Beginning on or about 09/26/2014	Ongoing		
11.d. Name and address through whom performed:	Additional Name and address through whom performed, if any:		
Name Simon Jara	Name Estevan Jara		
Organization	Organization		
P.O. Box, Bldg., Room No., if any	P.O. Box, Bldg., Room No., if any		
Street 10380 Rochelle Ave	Street 10380nRochelle Ave		
City Santee	City Santee		
State California ZIP Code + 4 92071	State California ZIP Code + 4 92071		
12.a. Identify subject groups of employees:	12.b. Identify subject labor organizations:		
All employees eligible to vote in the bargaining unit	The International Brotherhood of Teamsters Local Union No. 63		
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Specific Activities to be Performed (Continuation Page)

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

Engaged to communicate with employees so they can make an informed decision reguarding exercising their rights to organize and bargin collectively.

11.b. Period during which performed:	11.c. Extent performed:
Beginning on or about 09/26/2014	Ongoing
11.d. Name and address through whom performed:	Additional Name and address through whom performed, if any:
Name Jose Agraz	Name
Organization	Organization
P.O. Box, Bldg., Room No., if any	P.O. Box, Bldg., Room No., if any
Street 4010 Ivey Vista Way	Street
City Oceanside	City
State California ZIP Code + 4 92057	State ZIP Code + 4
Additional Name and address through whom performed, if any:	Additional Name and address through whom performed, if any:
Name	Name
Organization	Organization
P.O. Box, Bldg., Room No., if any	P.O. Box, Bldg., Room No., if any
Street	Street
City	City
State ZIP Code + 4	State ZIP Code + 4
12.a. Identify subject groups of employees:	12.b. Identify subject labor organizations:
All employees eligible to vote in the bargaining unit	The International Brotherhood of Teamsters Local Union No. 63
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Date: September 8, 2014

Via Email: rchase@ontrac.com

Campaign Consulting

Rick Chase

V.P. and Chief Admin Officer

OnTrac

829 Smithway Street Commerce, CA 90040

323-725-2100

International Labor Relations

Corporate Headquarters 8086 South Yale Avenue Suite 225 Tulsa, OK 74136

Toll Free: (800) 555-7509 **Direct:** (918) 633-6640

RE: OnTrac ~ Campaign Consulting
Petition #21-RC-135429 filed on August 26, 2014 by the International

Brotherhood of Teamsters Local Union No. 63

SITUATION ASSESSMENT:

This Engagement Letter outlines the terms of complete and comprehensive Consulting services to combat the organizing drive launched against OnTrac, or "Company". The International Brotherhood of Teamsters Local Union No. 63, the "Union", has presumably more than 50% of the unit who have signed Authorization Cards purporting to authorize the Union to act as their exclusive representative for collective bargaining wages, hours and working conditions.

Petition #21-RC-135429 dated August 26, 2014, has been filed with the NLRB Regional Director requesting that a vote be scheduled on the merits of the petition and an election is forthcoming.

A systematic, organized counter-campaign will be implemented to secure an election win. All executives, managers and supervisors must be thoroughly trained in best practices in alignment with NLRB rules and regulations. Time is of the essence in commencing work on behalf of the Company. Any delay is injurious to the Company's chances of successfully winning the election.

OBJECTIVES:

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- Our objectives for this campaign include conducting a thorough assessment as to the local management and conditions that led to the organizing effort.
- Training local management in the operation of the National Labor Relations Act including formation of the Company's Union-free philosophy statement, the enforcement of no-solicitation, no-distribution policies, a full understanding of the actual Union Organizing Plan, and an understanding of the use and misuse of Union Authorization Cards.
- Management's knowledge of what they can say during the Union campaign including disadvantages of Union representation from the viewpoint of the Company Services and the Company employees. A thorough understanding of the facts involving collective bargaining, strikes, Union fines against members, and obligations owed by employees to the Union.
- An understanding of what the supervisor can do during the organizing campaign. A thorough understanding of the TIPS rules including common questions that employees ask supervisors during a campaign and desired responses.
- Supervisor/employee role-playing scenarios involving common situations that occur during Union organizing campaigns.
- Development of a campaign calendar that outlines what should happen in countering the Union organizing effort on a daily basis. This includes development of management and supervisor speeches and talks, handouts that can be utilized, posters that can be posted, and legally compliant anti-Union material that can be distributed to all eligible voters.
- Systematic captive audience meetings with all supervisors and voting employees on a weekly basis, with distribution of appropriate handouts in English or any other applicable language.

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MEASURES OF SUCCESS:

- Our metrics will include obtaining the most effective and appropriate bargaining unit and election scenario that improves the likelihood of an effective winning campaign.
- Winning the election while avoiding all unfair labor practice charges.

VALUE TO THE ORGANIZATION:

- The value to the organization will include permitting the Company to continue to operate without the necessity of bargaining with the Union over wages, benefits, hours and working conditions.
- Proactively identifying those factors and conditions by department that contribute to low employee morale and disaffection.
- One-on-one discussions with each manager and supervisor to localize issues that demand attention and possible correction during the election and following the election. Reporting to senior management about the strengths and weaknesses in the organization that require immediate intervention and corrective action to minimize the likelihood of future Union encroachment.

TERMS AND CONDITIONS:

Fees: The fee for a Partial Guarantee Win is a retainer of \$30,000.00 for two (2) Campaign Consultants (plus expenses and travel days) for up to 15 days, plus a performance bonus of \$30,000.00 in the event of a petition withdrawal prior to the election or a win on the date of the election. Thus, the Partial Guarantee Project Price is \$60,000.00 upon a win or union petition withdrawal (plus expenses and travel days), with half the project price, \$30,000.00 at risk to International Labor Relations.

This agreement includes two (2) Consultants for up to 15 days of Campaign Consulting including travel days. Should additional days of Management Consulting be requested by the Company, it is understood those additional calendar days plus travel days will be billed at \$2,000.00 per day per Consultant and are not subject to the partial guarantee. For purposes of this

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proposal/letter of engagement a consulting day means each calendar day worked and travel days by each additional individual Consultant.

This agreement covers 15 days of consulting up to and including the initial election dates directed or stipulated to by the Company and the Union. For purposes of this agreement, an 'election win' is defined as a withdrawal of the petition or a win at the ballot box. An election loss is defined as a certification by the NLRB that the Union was selected as representative of your employees.

Should additional days of Management Consulting, extending beyond the initial 15 days, be requested by the Company, it is understood those additional calendar days will be billed at our customary rate of \$2,000.00 per day including travel days. For purposes of this proposal a consulting day means each calendar day worked.

In the event NLRB Representation is required and assigned to an International Labor Relations Consultant, NLRB Representation shall be billed at \$375 per hour off site or \$3000.00 per day including travel days for on site NLRB Representation.

In the event that Public Relations and Media Management is required and assigned to an International Labor Relations Consultant, Public Relations and Media Management Consulting will be billed at \$375 per hour off site or \$3000.00 per calendar day including travel days for on site Public Relations and Media Management Representation.

Company shall provide air travel, rental car, hotel accommodations, meals, and reasonable business expenses as set forth below to consultants through weekly billing to Company.

Initial Retainer: The initial retainer for Campaign Consulting is \$30,000.00 to be wired to International Labor Relation upon commencement of services.

Payment Terms: Payment of Statement of Services Rendered, to be delivered in an electronic format, is expected within 7 days upon delivery throughout the mutually agreed upon duration for Management Consulting.

Expenses: All airfare, hotel, and rental car expenses will be billed as incurred and are due upon presentation of ongoing Expense Reports and direct billed by the Consultant. All expenses not direct billed by the

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Consultant will be billed on behalf of the Consultant through International Labor Relations and are due upon receipt. Expenses may include unpaid transportation (air, rental car, taxi, parking, etc.), lodging expenses, food,

Campaign Consulting

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AGREEMENT TERMS:

and other reasonable business expenses.

Copyright: 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.

U.S. Department of Labor Reporting Requirements: You further acknowledge that no representation by International Labor Relations 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 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.

Arbitration: 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 any dispute between them and to resolve any disputes by arbitration in Tulsa, Oklahoma under the American Arbitration Association rules.

Initial		



Campaign Consulting

ACCEPTANCE: Your signature below indicates acceptance of the terms and this proposal. In the event this Agreement is unsigned by Company, work commenced by Consultant on behalf of Company shall constitute acceptance by Company of all terms and conditions stated herein.

Top Consultation (For Configurations).	

On this day of: <u>September 8, 2014</u>
Jim Teague
President & CEO

International Labor Relations

Printed Name: _____
On this day of: _____
Rick Chase
V.P. and Chief Admin Officer
OnTrac

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