

FORM LM-20 AGREEMENT AND ACTIVITIES REPORT



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.

569 8249

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 Oak Harbor Freight Lines Inc

Trade Name, if any

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

Street 853 South Maple Avenue

City Montebello

State California

ZIP Code + 4 90640

7. Date entered into:

12 / 7 / 2012

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

Name Ron

Kieswether

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 1/11/2013

Date

918-455-9995

Telephone Number

On 1/11/2013

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:	11.c. Extent performed:
various days beginning 12/10/2012	Fully Performed
11.d. Name and address through whom performed:	Additional Name and address through whom performed, if any:
Name	Name Simon Jara
Organization Clegg & Assoc Mgmt Group	Organization
P.O. Box, Bldg., Room No., if any	P.O. Box, Bldg., Room No., if any
Street 17583 26th Ave	Street 10380 Rochelle Avenue
City Surrey BC V3S 3K4	City Santee
State ZIP Code + 4	State California ZIP Code + 4 92071
12.a. Identify subject groups of employees:	12.b. Identify subject labor organizations:
Drivers	Teamsters

LRI Consulting Services Inc
File No. C00525

Additional information Item 11.d.

Charles Stephenson
2192 Moterey Peninsula Dr
Corona, CA 92882



LRI Consulting Services, Inc.

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

www.LRIonline.com

Proposal

December 7, 2012

Ron Kieswether
Oak Harbor Freight Lines, Inc.
853 South Maple Avenue
Montebello, CA 90640

253-670-4298

Ron.Kieswether@oakh.com

RE: Petition 21-RC-94108

Situation Assessment

You have asked for a proposal to provide materials and consulting services to help you win your upcoming NLRB election. You have a few short weeks to educate your employees on the disadvantages of unions and convince them to put their trust in a direct relationship with you as opposed to an outside third party like the union. You want to make sure that your consulting is persuasive, legally sound and provides the best opportunity to build trust with your employees.

Proposed Intervention(s)

Campaign Consulting: For this option we will provide expert campaign consulting with an on-site facilitator to communicate your message directly to employees in employee meetings and one-on-one. Our consultant 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. This option does not include representation before the NLRB, which would require an additional engagement if desired by the client.

Objectives

- ADVISE & CONSULTATION REGARDING UNION ORGANIZING AT OAK HARBOR'S MONTEBELLO FACILITY
- Determine the likelihood of a corporate campaign attack against your company. Assess your readiness to defend against a corporate campaign.
- Determine action steps required to move you from your current level of readiness to being fully prepared to meet a corporate campaign and proactively taking steps that reduce the likelihood of a campaign.

Value to Organization

- You will reduce the likelihood that the media will treat union messages seriously.
- You will reduce or eliminate the expenditure of corporate resources and attention to the battle with a union and focus those resources on more productive areas of business.
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7850 S. Elm Place · Suite E
Broken Arrow, OK 74011

Terms and Conditions

The fee for consulting is a project price of \$50,000 which assumes approximately 12 consulting days and includes all consulting and communication materials (reasonable travel expenses are not included in this price and will be billed separately). For purposes of this proposal a consulting day means each calendar day worked by each consultant. If more than one consultant is working on your case the parties understand and agree that multiple consulting days may be worked on each calendar day. AN ADDITIONAL \$5,000 FOR MATERIALS (DVDs, HANDOUTS, ETC) THAT WILL BECOME THE PROPERTY OF OAK HARBOR FREIGHT LINES

Payment Terms

All fees are due upon the delivery of the consulting services and are non-refundable. We require a 50% retainer due upon acceptance of proposal. You also agree to coordinate, arrange and pre-pay consultants' airfare, hotel accommodations and, if deemed necessary, a rental car. Any expenses incurred by consultant will be billed to you and are due upon receipt and you agree to settle those statements within 7 days and to provide a credit card for us to settle outstanding invoices not paid by that time. You agree and acknowledge that failure to pay fees or expenses associated with this project under these terms will result in reassignment of consultant(s), a penalty of the maximum allowable interest rate per month plus any costs we incur to collect an outstanding balance, until all outstanding invoices are paid in full.

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

IF, AT ANY TIME, THE SERVICES PROVIDED BY THE LRI CONSULTANT IS DEEMED BY OAK HARBOR AS INADEQUATE, OAK HARBOR CAN TERMINATE THIS AGREEMENT AND WILL OWE THE AMOUNT EQUAL TO NUMBER OF LRI CONSULTANT WAS ON SITE IN MONTEBELLO MULTIPLIED BY DAILY RATE OF \$3000, PLUS MATERIALS COST. IF THE TOTAL AMOUNT OWED IS LESS THAN RETAINER, THE DIFFERENCE WILL BE REFUNDED TO OAK HARBOR.

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fax 918-455-9998

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Acceptance

We accept the proposal above and the intervention(s) selected:

 Campaign Consulting

For LRI Consulting Services, Inc.

Phillip B. Wilson, President/General Counsel

Date: December 7, 2012

For Oak Harbor Freight Lines, Inc.

Ron Kieswether

Date: 12/12/12

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