



# Mail Handlers Local Union No. 323

1602 Selby Ave., Suite 5 St. Paul, MN 55104  
(651) 646-2827 Fax (651) 646-0991 LocalOffice@Local323.org

## Minutes of the Local Union 323 Executive Board Meeting ST. PAUL, MN March 19, 2020

Jeff Larsen

*Local President*

Kathy Schultz

*Vice President*

Dean Abatte

*Recording Secretary*

John Frey

*Treasurer*

State Executive

Board Members

Shane Ryden

*Minnesota*

Brock Engstrom

*North Dakota*

Branch Presidents

Dean Abatte

*Minneapolis*

Edward Yun

*St. Paul*

Mike Straiton

*NDC*

Gary Tollefsrud

*Fargo*

### IN ATTENDANCE:

**Local President:** Jeff Larsen

**Vice President:** Kathleen Schultz

**Recording Secretary:** Dean Abatte \*

**Treasurer:** John Frey

**MN SEBM:** Shane Ryden

**ND SEBM:** Brock Engstrom

Local President Jeff Larsen called the Executive Board to order at 10:30 a.m.

A review of the previous minutes from December 27, 2019. A motion to accept the minutes by Treasurer Frey and 2nd by Vice President Schultz, motion carried.

**Local President Jeff Larsen reports:** (see attached for full report).

- Local 323 Compliment

### Local Issues

- Fiscal year change
- 2019 National Agreement
- Virus Outbreak
- Election of Convention Delegates
- Local 323 Dental Program
- FEFA Retirement Seminars
- Scheduling Issues

### Branch Activities

President Larsen reported that since the last meeting of the Local Executive Board, he has made several visits to the metro-area Branches and attended a Labor-Management meeting at the St. Paul P&DC.

### **Presidents expense report**

Local President Jeff Larsen submitted his Expense Report for review. ND SEBM Engstrom moved to authorize the Local Presidents expenses for the time frame of the report. This motion was seconded by MN SEBM Ryden. The motion carried.

### **Treasurer's report:**

Local Treasurer John Frey submitted the Local Union's Balance Sheet and Profit and Loss Statements.

ND SEBM Engstrom motioned to authorize the expenses of the Local Union for the time frame enumerated. The motion was seconded by Vice President Schultz and the motion carried.

### **Election Judges:**

Local President Larsen submitted a list of Members willing to serve as election Judges for the 2020 Local 323 Election of Officers. Local President Larsen made a motion that the Local Executive Board appoint these Members as Judges and that motion was seconded by ND SEBM Engstrom. The motion carried. Accordingly, the following Members will serve as the Judges for the 2020 Local 323 Election of Officers:

- Jonta McPherson
- Kathy Schultz
- Nichole Rodriguez
- Jarod Hoover (Alternate)
- Tony Stickler (Alternate)

### **2020 Convention:**

There was discussion regarding the Per Diem for the 2020 National convention. This elicited a proposal from ND SEBM Engstrom of a flat rate of \$200 for the week of the convention for each Delegate to cover the cost of meals. This proposal was tabled for further discussion.

### **Additional Items:**

- Amended ND Form 40 filing (UBIT)
- MHBP Local Union Enrollment
- Review of Retirement Letters

### **Upcoming Events:**

#### **2020 Local Union 323 Picnic**

Due to the current Pandemic, a discussion about the viability of a 2020 picnic occurred. It was decided to table the issue and see how things develop. The picnic is scheduled to be held June

28, 2020, at Como Pavilion in St. Paul. As of the meeting date, going forward with the picnic remains TBD.

Local President Jeff Larsen asked the Board Members if they had any addition items. Hearing none, he asked for a motion. Vice President Schultz made a motion to adjourn the Local Executive Board Meeting. That motion was seconded by Treasurer Frey, the motion carried, and the Meeting adjourned at 11:40 a.m.

Respectfully Submitted,

Dean Abatte  
Recording Secretary Local 323  
National Postal Mail Handlers Union

\* Recording Secretary Abatte participated from home via Zoom video conferencing due to illness.



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March 19, 2020

## Local President's Report Local Executive Board

Jeff Larsen  
*Local President*

Kathy Schultz  
*Vice President*

Dean Abatte  
*Recording Secretary*

John Frey  
*Treasurer*

State Executive  
Board Members

Shane Ryden  
*Minnesota*

Brock Engstrom  
*North Dakota*

Branch Presidents

Dean Abatte  
*Minneapolis*

Edward Yun  
*St. Paul*

Mike Straiton  
*NDC*

Gary Tollefsrud  
*Fargo*

### Local 323 Complement:

The Local 323 career complement as of Pay Period 3-20 is 609 (534 MN & 75 ND) and the MHA complement is 104 (89 MN & 15 ND). Combined Membership as of Pay Period 5-20 is 650.

### Local Issues:

- **Fiscal Year Change**

As the Members of the Local Executive Board know, January 1<sup>st</sup> marks the beginning of a new fiscal year for Local 323. This requires us to perform many tasks so that the Local Union remains in compliance with the Uniform Local Union Constitution as well as with all applicable laws and regulations.

The tasks performed include:

- Issuance of W-2's to employees (all Representatives)
- Filing of W-2's with both States (Web Filing - Minnesota)
- Filing of W-2's along with W-3 with the Social Security Administration
- Issuance of 1099's to vendors
- Filing of 1099's along with 1096 to IRS

The completion of these tasks allows Local Treasurer John Frey and I to begin our preparations for the annual audit. That audit was conducted over five days during the week of February 24<sup>th</sup>. The audit provided us with the opportunity to review any outstanding issues. The only outstanding issue involved the 2018 unrelated business income tax filing with the State of North Dakota (ND Form 40). Upon review it was discovered that there was an inaccurate allocation which lead to this issue. While the amount involved was relatively small (\$39.00), it was nonetheless important to correct our filing. An amended 2018 filing was completed and sent to the State of North Dakota. A copy of that filing has been included with the documents provided to the Local Executive Board for this meeting. The end result is that Local 323 has a \$39.00 credit towards unrelated business income tax with the State of North Dakota.



The next step in our filings will be the uploading of our LM-2 to the Department of Labor. That filing is due by the end of March. A copy of the LM-2 will be provided to the Members of the Local Executive Board via email prior to its submission. Additional filings with the IRS and the States aren't due until May 15<sup>th</sup>.

Legacy Professionals will attend the next meeting of the Local Executive Board to review the results of the annual audit.

- **2019 National Agreement**

On January 22<sup>nd</sup> the National Union announced that they had reached a tentative agreement with the Postal Service. That agreement, if ratified, would run from September 21, 2019 through September 20, 2022. The agreement contains 3.9% in general wage increases, continuation of COLA's, reactivation of night shift differential, the elimination of casuals, and several changes to Article 12. I wrote in detail on our website regarding the changes contained in the agreement; so, I won't restate my analysis here. Suffice it to say that I wholeheartedly support ratification and look forward to working with our Representatives in implementing this new agreement. The counting of the ratification ballots was scheduled to occur on March 23<sup>rd</sup>; however, the National Union has reported that this will be delayed two to three weeks. This delay is the direct result of impacts being felt from the coronavirus.

- **Coronavirus Outbreak**

The Coronavirus has quickly caused unanticipated disruptions to our personal and working lives. Federal, State, and Local Governments continue their efforts to combat its spread. In addition, both the Postal Service and the Union are taking steps to address issues resulting from the coronavirus. The Postal Service at the headquarters level has issued guidance to its managers and supervisor concerning the related issues. I have circulated this guidance via email to all Branches.

On March 17<sup>th</sup>, I participated in a national teleconference conducted by the National Union to address issues resulting from the present circumstances. The AFL-CIO has closed the building where our Washington, DC headquarters is located, and the Officers and Representatives domiciled there are working outside the office. The National Union has joined the AFL-CIO coronavirus task force; and working with the AFL-CIO, has urged the United States Senate to ensure workers' safety and economic wellbeing by passing the Families First Coronavirus Response Act (H.R. 6201). The National Union has also cancelled several travel related activities. Specifically, the SAMLU scheduled for next month has been cancelled and all travel for step 3 meetings or training has been suspended. Additional discussions with the Postal Service are ongoing.

- **Election of Delegates – 2020 National Convention**

On January 10<sup>th</sup>, Judges of Election Kathy Schultz, Mike Straiton, and Tony Stickler, conducted the nomination meeting for Delegates to the National Convention. This meeting was held for the purpose of filling five Delegate positions. Six people were nominated for Delegate. Following the nominations, Local Treasurer John Frey voluntarily requested to be relegated to

the position of Alternate Delegate and drafted a letter to the Judges indicating this desire. Consequently, the Judges declared the other five candidates duly elected Delegates with John Frey as the duly elected Alternate Delegate. Congratulations go to Dean Abatte, Brock Engstrom, Edward Yun, Delicia Johnson, and Brian Newhouse, who will represent Local 323 as Delegated at the 2020 National Convention. Special thanks go to Local Treasurer John Frey who has once again placed cost savings to the Local Union above his personal interests.

- **Local 323 Dental Program**

The beginning of the year also marks the beginning of the enrollment period for the Local 323 Dental Program. Local 323 offers our Dental Program to the Regular Membership as well as Postal and Federal employees who chose to affiliate as Associate Members. By end of January of each year the Local Union bills Associate Members dues for the enrollees who are not otherwise eligible. That process is currently near completion.

This dental plan is available to all Members including MHA's. Any newly hired Members who are interested in this plan should contact me at the Local Office. I will continue to serve as the plan administrator for this program.

- **Federal Employees First Alliance (FEFA) Retirement Seminars**

Due to issues resulting from the coronavirus, FEFA has requested that the seminars scheduled for April and May be postponed. These seminars will be rescheduled when circumstances permit. Any Member requiring immediate assistance with their retirement may contact the Local or Branch office for a direct referral to FEFA.

- **Scheduling Issues**

Due to the present circumstances, we are currently holding off from scheduling Branch Meetings. That will continue to be reassessed on an on-going basis as things progress. Meetings of the Local Executive Board and Local Union Council will continue as usual absent extreme circumstances.

### **Branch Issues:**

- **Branch Activities**

Since the last meeting of the Local Executive Board, I have been in all the metro-area Branches on several occasions; albeit briefly in some cases. Also, I've attended one Labor-Management meeting in St. Paul.

**Upcoming Events:**

Local Elections – May – Schedule to be determined by Judges

Fraternally,

Jeff Larsen  
Local President

cc: All Branches  
File