WRITERS GUILD OF AMERICA, WEST, INC.
NON-MEMBER "FINANCIAL CORE STATUS"
POLICY STATEMENT

COVER SHEET

Item No.	Item Description	
0.1	**Union:**	
	Name	Writers Guild of America, West, Inc.
	Street Address	7000 West Third Street
	City, State and Zip Code	Los Angeles, CA 90048
0.2	**Official to Contact Concerning this Policy Statement:**	
	Name and Title	Lori Hitner, Membership Administrator
	Phone	323.782.4532
	Fax:	323.782.4804
	Email:	lhitner@wga.org
0.3	**Date of:**	
	This policy statement	
	Revision 1.0	January 1, 1999
	Revision 2.0	July 1, 2008

WRITERS GUILD OF AMERICA, WEST, INC.
NON-MEMBER "FINANCIAL CORE STATUS"
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WRITERS GUILD OF AMERICA, WEST, INC.
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PART 1
GENERAL INFORMATION

Item No. Item Description

1.1 The Board of Directors of the Writers Guild of America, West, Inc. (WGAW) at its meeting on November 30, 1998, adopted the policy regarding "Financial Core Status" (FSC) as it applies to WGAW members who take "Financial Core Status" and to employees required to meet WGAW obligations under the union security clauses of Writers Guild of America agreements where such union security clauses are lawful.

1.2 The following rules and policies will be followed by the WGAW in the matter of FCS non-members of the WGAW.

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PART 2
FINANCIAL CORE STATUS NON-MEMBERSHIP IN THE WGAW

Item No. Item Description

2.1 The term Financial Core Status (FCS) refers to a person who works under a collective bargaining agreement between the WGAW and one or more production companies, and who declines membership in the WGAW.

2.2 FCS non-membership includes the following:

(a) a member of the WGAW who resigns and takes such FCS non-membership, or

(b) A person obligated to pay initiation fees and dues upon obtaining sufficient employment under a union security provision of a WGA agreement where such provisions are lawful, and who elects not to become a member of the WGAW although qualified to join as a Current member under the WGAW's Constitution.

2.3 Any person working under a collective bargaining agreement as defined in 2.1 above or any person as defined in 2.2 above has the right to become or remain a FCS non-member.

2.4 FCS non-members have the right to object to paying for WGAW activities which have been held not to be germane to the union's duties as a bargaining agent and to obtain a *pro rata* reduction in dues corresponding to the expenses associated with non-germane activities.

2.5 As provided in Part 3 *et seq*., FCS non-members have the right to be given sufficient information to enable them to intelligently decide whether to object (i.e., elect FCS), and to be apprised of any internal union procedures for filing objections.

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PART 3
NOTICE OF THE RIGHT TO OBJECT

Item No. Item Description

3.1 Any person electing Financial Core Status (FCS) non-membership must notify the WGAW of his or her decision by filing a Notice of Objection in writing addressed to:

Lori Hitner, Membership Administrator
Writers Guild of America, West, Inc.
7000 West Third Street
Los Angeles, CA 90048

3.2 When perfected, the Notice of Objection is irrevocable.

3.3 In order to be valid, the Notice of Objection must be postmarked during **ONE** of the following periods:

(a) For members, on or before July 31 for the upcoming fiscal year,

(b) For non-members, during the thirty (30) day period following receipt of the "Notice to Writers Guild of America, West, Inc. Dues Payers."

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PART 4
REPRESENTATION RIGHTS

Item No. Item Description

4.1 A Financial Core Status (FCS) non-member shall be deemed to have resigned from membership in the WGAW. By resignation, such person has no rights of membership (as distinguished from employment rights under a collective bargaining agreement).

4.2 Specifically, a FCS non-member dues payer is **NOT** entitled to membership rights in the Guild, such as the right to:

(a) Compete for and receive Writers Guild Awards
(b) Attend membership meetings or any other WGAW events for professional writers
(c) Vote on changes in the credits system
(d) Run for WGAW office
(e) Vote in WGAW elections
(f) Participate in the formation of WGAW bargaining proposals
(g) Vote to ratify or not ratify WGA bargaining agreements
(h) Access the Members Only section of the WGAW website
(i) Use the Guild script registration service at the members' rate
(j) Join the WGAW's Film Society
(k) Serve on WGAW committees
(l) Exercise or enjoy any other rights or privileges of WGAW membership unrelated to the negotiation and administration of collective bargaining agreements (i.e., Strike Loan, Good & Welfare Loan, and other WGAW assistance programs)

4.3 As long as the FCS non-member continues to pay his or her financial obligations to the WGAW, he or she shall have the right to continue employment and to be represented by the WGAW under an applicable collective bargaining agreement in the same manner as a WGAW member.

4.4 THE WGAW WILL CONSIDER A PERSON'S DECISION TO ELECT FCS NON-MEMBERSHIP IRREVOCABLE. THIS IS SO WHETHER A PERSON MAKES THIS DECISION UPON FIRST BECOMING ELIGIBLE TO JOIN THE WGAW, OR AT A LATER TIME THROUGH RESIGNATION.

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PART 5
FINANCIAL OBLIGATIONS

Item No. Item Description

5.1 A Financial Core Status (FCS) non-member is obligated to pay that share of WGAW dues that are chargeable for WGAW administration and collective bargaining or employment-related interests of employees represented by the WGAW.

5.2 An FCS non-member shall deliver a complete and accurate declaration of earnings to the WGAW within thirty (30) days after the WGAW sends a declaration form to the non-member.

5.3 A bookkeeping fee of Ten Dollars ($10.00) per quarter shall be charged for each quarter in which a FCS non-member does not file a declaration of earnings.

5.4 A FCS non-member shall be considered in arrears if the non-member (a) does not pay an initiation fee; (b) fails to file a complete and accurate declaration of earnings as set forth above; or (c) does not pay dues or a bookkeeping fee.

5.5 If an FCS non-member fails to meet his/her financial obligations to the WGAW, the WGAW may exercise its right to seek termination of the FCS non-member's employment under the provision of the relevant collective bargaining agreement.

5.6 An FCS non-member shall be reinstated to active status upon the payment of the FCS non-member's outstanding balance of unpaid initiation fee, dues and bookkeeping fees.

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WRITERS GUILD OF AMERICA, WEST, INC.
NON-MEMBER "FINANCIAL CORE STATUS"
POLICY STATEMENT

PART 6
STANDARDS FOR EVALUATING WGAW ACTIVITIES AND EXPENDITURES: GENERAL DESCRIPTIONS

Item No. Item Description

6.1 A Financial Core Status (FCS) non-member shall be charged a pro rata share of WGAW dues attributable to those expenditures germane to collective bargaining and the advancement of employment-related interests of employees represented by the WGAW.

6.2 This policy statement establishes standards to determine which WGAW activities are or are not germane (i.e., chargeable or non-chargeable) to collective bargaining or to advancing the employment-related interests of employees represented by the WGAW.

6.3 Principal classes of activities and expenditures

(a) Germane activities (chargeable expenditures)
(b) Non-germane activities (non-chargeable expenditures)
(c) Mixed activities (chargeable and non-chargeable expenditures)
(d) Other expenses (allocable based on the chargeable expenditures they supplement)

6.4 Major Types of Indirect Costs

(a) Operating Expenses
(b) Administration

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PART 6 [continued]
STANDARDS FOR EVALUATING WGA ACTIVITIES AND EXPENDITURES:
GERMANE ACTIVITIES (CHARGEABLE EXPENDITURES)

Item No. Item Description

6.5 The following germane activities are chargeable to all FCS non-members: [continued]

(1) Collective Bargaining Activities

(a) Contract negotiations and preparing for negotiations

(i) Background reading and research for discussions concerning bargaining subjects;
(ii) Formulating bargaining priorities and proposals;
(iii) Drafting contract language;
(iv) Preparing supporting documents for bargaining proposals;
(v) Developing computer based or other information retrieval and research files for bargaining and providing research, technical assistance and staff support related to bargaining;
(vi) Producing and distributing materials and organizing meetings and conferences that provide bargaining advice and support and clarify bargaining strategy;
(vii) Designing and conducting surveys to ascertain employee bargaining goals and priorities;
(viii) Preparing and distributing materials and organizing meetings and conferences informing and educating employees about bargaining goals, policies, priorities and strategies.

(b) Negotiating contracts

(i) Negotiating collective bargaining agreements;
(ii) Compiling and maintaining information on the status of negotiations;
(iii) Drafting reports and other works related to contract ratification.

(c) Economic actions

(i) Strikes;
(ii) Picketing;
(iii) Boycotting;
(iv) Demonstrations;
(v) Leafleting and publicity other than picketing;
(vi) Efforts to enhance and maintain a united front, allegiance and commitment among employees represented by the union.

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NON-MEMBER "FINANCIAL CORE STATUS"
POLICY STATEMENT

PART 6 [continued]
STANDARDS FOR EVALUATING WGA ACTIVITIES AND EXPENDITURES:
GERMANE ACTIVITIES (CHARGEABLE EXPENDITURES)

Item No. Item Description

6.5 The following germane activities are chargeable to all FCS non-members: [continued

(2) Contract Administration – Grievance Adjustment and Arbitration

(a) Handling employees' questions and complaints about working conditions, benefits and contract rights;
(b) Advising employees concerning the meaning of contract clauses;
(c) Attending stewards' and their representatives meetings and grievance committee work;
(d) Meetings, phone calls and the like with employer representatives to discuss the meaning of the contract generally or to discuss or settle a particular grievance or potential grievance;
(e) Arbitration proceedings, including preparation for and representation of the claim in the hearing and all costs associated with the hearing;
(f) Efforts to secure compliance with settlement agreements and arbitration awards, or to modify or vacate adverse awards;
(g) Developing and maintaining computer based or other information retrieval and research files to assist in conflict enforcement, grievance adjustment and arbitration and to provide research and technical assistance and staff support to these activities;
(h) Administration of contract provisions concerning payment of residuals and the determination of credits.

(3) Organizing Activities

(a) Any activities designed to acquire new members or obtain new representation rights;
(b) An ancillary activity intertwined with organizing, such as strikes or boycotts, which are designed to acquire new members or obtain new representation rights;
(c) Developing computer-based or other information retrieval systems concerning non-members or monitoring organizing efforts;
(d) Activities designed to solidify support by those the union currently represents or any activity otherwise directed to increasing or preserving the allegiance of employees the union already represents, such as staff liaisons and member outreach.

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PART 6 [continued]
STANDARDS FOR EVALUATING WGA ACTIVITIES AND EXPENDITURES:
GERMANE ACTIVITIES (CHARGEABLE EXPENDITURES)

Item No. Item Description

6.5 The following germane activities are chargeable to all FCS non-members: [continued]

(4) Membership Services and Activities Ancillary to Collective Bargaining

Other regular or customary union activities that are principally directed to employees and designed to strengthen the union as a cohesive and effective bargaining agent, or that otherwise promote closer ties among employees are germane. Examples of germane membership services and ancillary activities would be:

(a) Social activities;
(b) Human relations and minority participation efforts primarily directed at unit employees, including conducting conferences and educational programs and producing and distributing materials;
(c) Efforts to communicate union policy to employees represented by the union, other efforts to build pride among represented employees, and other efforts to produce group cohesiveness among employees represented by the WGAW.
(d) Community services liaison activities that provide employees represented by the union with information and assistance regarding governmental services to which they are entitled;
(e) Unity items provided employees who are currently represented by the WGAW (e.g., pens, pencils, buttons, emblems, etc.).

(5) Internal Governance and Administration

(a) Electing officers and conducting union meetings, executive council, board and committee meetings and conventions;
(b) Union financial administration, accounting and data processing activities that support germane activities, development of computer based or other information retrieval files for monitoring membership status and dues payments, and auditing activities;
(c) Union judicial administration including interpretation and enforcement of the union's constitution, rules and bylaws;
(d) Affiliate relations including resolving jurisdictional controversies and similar disputes and providing coordination between and among affiliates on matters related to their statutory functions as bargaining representatives;
(e) Other standard features of union internal operations related to governance, administration, coordination and overall cohesion.

WRITERS GUILD OF AMERICA, WEST, INC.
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PART 6 [continued]
STANDARDS FOR EVALUATING WGAW ACTIVITIES AND EXPENDITURES:
GERMANE ACTIVITIES (CHARGEABLE EXPENDITURES)

Item No. Item Description

6.5 The following germane activities are chargeable to all FCS non-members: [continued]

(6) Training

(a) Education and training programs and conferences related to contract administration, grievance handling and arbitration;
(b) Leadership training programs and conferences used to teach leadership skills, promote harmonious group interaction and to provide informed leaders;
(c) Other training activities to assist employees in better representation regarding wages, hours and conditions of employment.

WRITERS GUILD OF AMERICA, WEST, INC.
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POLICY STATEMENT

PART 6 [continued]
STANDARDS FOR EVALUATING WGAW ACTIVITIES AND EXPENDITURES:
NON-GERMANE ACTIVITIES (NON-CHARGEABLE EXPENDITURES)

Item No. Item Description

6.6 The following non-germane activities are non-chargeable to all FCS non-members:

(1) Political activities (partisan or nonpartisan)

(a) Voter registration drives;
(b) Political education fundraising and related activities;
(c) Attending political dinners, conferences and similar gatherings;
(d) All contributions of any kind to political campaigns whether financial contributions, free use of paid union staff, data processing support, or use of union equipment or facilities;
(e) Training sessions and conferences related to political action.

(2) Activities primarily directed to non-writers

(a) Public relations activities directed primarily at persons not represented by the WGAW and activities otherwise seeking community goodwill;
(b) Participation in public affairs conferences or media events;
(c) Lectures or addresses to, or appearances before, gatherings or conferences consisting principally of persons not represented or employed by the union;
(d) Community organizing conferences and training conferences directed primarily at community organizing;
(e) Public information reports, news releases and similar efforts;
(f) Affiliation fees, including per capita payments to local and international affiliates;
(g) Dues to outside organizations;
(h) Contributions to any outside educational or charitable group (e.g., the United Way, American Red Cross and similar activities carried out for the good of society generally);
(i) Expenditures related to international or foreign relations

(3) Lobbying Activities

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PART 6 [continued]
STANDARDS FOR EVALUATING WGAW ACTIVITIES AND EXPENDITURES:
MIXED ACTIVITIES (CHARGEABLE AND NON-CHARGEABLE EXPENDITURES)

Item No. Item Description

6.7 The following mixed activities are chargeable and non-chargeable on a pro rata basis to FCS non-members:

(1) Litigation and agency proceedings.

(a) Litigation and agency proceedings are chargeable:

(i) when they are incident to internal governance or;
(ii) when they are incident to the negotiation or administration of collective bargaining agreements or necessary to preserve the integrity of collective bargaining agreements.

(2) Publication activities and other member communications

(a) Expenses of articles about activities germane to governance and collective bargaining;
(b) Other publication expenses are not chargeable;
(c) Other "filler" designed to enhance readability are allocated in the same ratio as the remainder of the publication.

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PART 6 [continue]
STANDARDS FOR EVALUATING WGA ACTIVITIES AND EXPENDITURES:
OTHER EXPENSES (ALLOCABLE BASED ON CHARGEABLE EXPENDITURES)

Item No. Item Description

6.8 The following "other expenses" are allocated to FCS non-members based on the chargeable expenditures they supplement:

(1) WGAW employee salaries:

(a) The salary ratios of key personnel and department managers are based on monthly activity reports, an activity calendar and expense reimbursement vouchers. These business records may be supplemented by interviews with key personnel and department managers;

(b) The salary ratio of personnel assigned to key personnel and department managers are based on the salary ratios set forth above;

(c) The salary ratio of the employees in the publications and member communications departments are based on a line-by-line review of WGA publications and member communications;

(d) The salary ratio of the staff liaisons and field representatives are based on their activity reports and expense reimbursement vouchers.

(2) Employee fringe benefits are allocated in the same ratio as employee salaries.

(3) Travel expenses are chargeable to all employees represented by the WGAW if the travel is primarily to engage in a chargeable activity or when the chargeable portion of mixed travel is based on reasonably accurate approximations.

(4) Operating expenses are allocated based on the ratio of chargeable activities to non-chargeable activities set forth above.

(5) Overhead expenses are allocated based on the ratio of chargeable activities to non-chargeable activities set forth above.

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PART 7
REPORT

Item No. Item Description

7.1 At the end of each fiscal year, the WGAW shall calculate which expenditures are for germane activities (chargeable) and non-germane (not chargeable) to Financial Core Status (FCS) non-members.

7.2 Upon the recommendation of the Membership and Finance Committee, the WGAW Board of Directors may request an audit of the WGAW's accounting records, maintained by the WGAW Secretary-Treasurer, to determine the expenditures incurred in the prior fiscal year which are chargeable and non-chargeable to FCS non-members.

7.3 The report with or without an audit shall be completed and available upon request from the WGAW Secretary-Treasurer. A summary of this report and the Notice to WGAW Dues Payers may be included in the WGAW Annual Report.

7.4 The WGAW shall furnish a "Notice To Writers Guild of America, West, Inc. Dues Payers" to the following persons:

(a) All members;

(b) All FCS non-members;

(c) All new members upon WGAW verification of their qualification for dues paying membership.

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PART 8
NOTICE OF CHALLENGE

Item No. Item Description

8.1 A Financial Core Status (FCS) non-member who wishes to challenge the calculation of chargeable and non-chargeable expenditures must inform the WGAW Secretary-Treasurer in writing within thirty (30) days from the date of receipt of the report as set forth in PART 7 of this policy statement. The written challenge must include the challenger's name, address, social security number and phone number.

8.2 Any Notice of Challenge must be made **ANNUALLY** and if valid, the Notice will be effective for a single fiscal year (April 1 – March 31).

8.3 All written challenges shall be sent by U.S. mail to the following address:

Lori Hitner, Membership Administrator
Writers Guild of America, West, Inc.
7000 West Third Street
Los Angeles, CA 90048

8.4 If the WGAW does not agree with the challenge either as to the expenditures or as to the percentage amount of dues to be paid, then the WGAW will notify the objecting FCS non-member in writing that he or she has ten (10) days to request arbitration and that if he or she fails to do so by a certified written notice within that time, then such person waives his or her rights to arbitration. In a case of waiver, the WGAW's calculation shall stand.

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PART 9
ARBITRATION PROCEDURES

Item No. Item Description

9.1 After the close of the challenge period, the WGAW Secretary-Treasurer shall provide a list of challengers to the American Arbitration Association (AAA). All challenges shall be consolidated. The AAA shall appoint an arbitrator from a special panel maintained by the AAA for this purpose. The AAA shall inform the WGAW Secretary-Treasurer and the appellants of the arbitrator selected.

9.2 The arbitration shall be scheduled expeditiously. The AAA has developed rules that govern these arbitrations, and, conscious of the need for an informed and expeditious decision, the arbitrator shall have control over all procedural matters affecting the arbitration.

9.3 Each party to the arbitration shall bear its own costs and attorneys' fees. The challenger shall have the option of paying a pro rata portion of the costs of the arbitrator's fee and expenses. The WGAW shall pay the balance of such fees and expenses.

9.4 A court reporter shall make a transcript of all proceedings before the arbitrator. This transcript shall be the official record of the proceedings and may be purchased by the challengers. If a challenger does not purchase a copy of the transcript, the WGAW shall make a copy available for inspection.

9.5 A challenger may, at his or her own expense, be represented by counsel or other representative of his or her choice. The challenger need not appear at the hearing and shall be permitted to file written statements with the arbitrator in lieu of a personal appearance. Such statements shall be filed no later than five (5) days before the opening of any hearings before the arbitrator.

9.6 The WGAW shall have the burden of establishing that the reduced dues charged are lawful.

9.7 If the arbitrator determines that more than one (1) day of hearing is necessary, he or she shall, to the extent possible, schedule the hearing to continue from day to day until completed. The WGAW and each challenger shall have the right to file a brief within fifteen (15) days after the hearing ends. The arbitrator shall issue a decision with thirty (30) days after the submission of post-hearing briefs, or within such other reasonable period as is consistent with the rules established by the AAA.

9.8 The arbitrator shall give full consideration to the legal requirements limiting the amounts that objectors may be charged, and shall set forth in his or her decision the legal and arithmetic basis for the decision.

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PART 10
AMENDMENTS

Item No. Item Description

10.1 The WGAW Board of Directors shall have authority to amend this Policy Statement as it deems appropriate.

10.2 This policy statement is deemed to be automatically amended to conform to applicable federal laws.