

TWU Express

TRANSPORT WORKERS UNION OF AMERICA, AFL-CIO

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America's Fighting Union



Shifting Power Back To Workers

By International President John Samuelson

Our founding International President Mike Quill was a powerful advocate of a third-party movement, known as the American Labor Party (ALP). In fact, Quill was the most famous ALP candidate elected to public office, because he appealed to overworked, underpaid workers; including New York City transit workers during the height of the Great Depression in the 1930s.

The ALP disappeared after the World War II, drowned in charges of being too radical. This remains the usual playbook for the two-party Democrat and Republican institutions, of then and now. Anything that threatens the dominance of our standard two-party system has been viewed as either too left or too right for America.

To me, the rights found within the U.S. Constitution have always stopped at the workplace door. Where at in the U.S., other than the American workplace, are the rights to free speech, freedom of association and assembly, and freedom from unreasonable search and seizure so blatantly violated without consequence?

Throughout the 20th century and into the 21st century, the two-party system has always found a way to drive a stake through the heart of the trade union movement, especially when the political establishment deemed working people were getting too big for our britches. Early on, Taft Hartley in 1947 and Landrum Griffin in 1959 severely restricted the activities and power of trade unions. Again, in 1975, the defeat of the Common Situs Picketing Bill further weakened the voices of workers. Most recently, the Supreme Court's Janus decision in 2018 took even more resources away from the trade union movement and enshrined the insidious Right to Work philosophy into law for the public sector. Not to mention restrictive state laws, like the Taylor Law in New York, that undermine the power of workers' rights to strike.

However, outside of legislation passed as a result of Covid-19 recently, there has not been one piece of pro-union legislation passed by Congress in well over 80 years, and any current legislation that would improve union density, such as the Pro Act, languishes in Congressional limbo.

After the midterm elections, Democrats began taking a victory lap, even while losing control of the House. While they found a way to hold onto the Senate, Democrats financially abandoned one of the best pro-union, pro-worker candidates on the ballot – Tim Ryan of Ohio. I can only imagine that Party leaders were given computer driven metrics that convinced them to pull financing from the race, because Ryan's candidacy was viewed as a "lost cause." What message does that send to the union workers from Ohio? Let alone their union sisters and brothers across America, who have long been the foundation of the post-World War II Democratic Party? And what about the Republicans? What will they do with the House majority



for the next two years? It seems the current political spectrum is a tit-for-tat circus. In my view, little if anything will get done for America's working families and the politicians will point fingers at each other and say, "it's their fault."

For far too long, the labor movement's political philosophy has been to simply throw support behind Democratic candidates as the lesser of two evils. The theory seems to be, at least Democrats won't do anything too terrible to hurt us is the process. There is certainly ample evidence to demonstrate that this isn't always true. One need not look further than the near-death blow to American workers caused by NAFTA and increased trade with China. Democrats have a huge culpability in the creation of the Rust Belt and the Republicans were there right alongside them, as hundreds of thousands of solid unionized blue-collar jobs were squandered away to Mexico and China.

Immediately following WWII, more than one in three workers were represented by a union. This was the time when Union labor built the American middle class. Unfortunately, only about one in ten workers belong to a union today. Simply put, the playing field has been tilted against us, and the tilt will only get worse unless we start to push back against those politicians who do not support us as union members working under a collective bargaining agreement.

A strong third party, based on core union values of the right to organize, bargain, and strike; with true freedom and equality in the workplace, and in society at large, would be a huge step in the right direction. If nothing else, a trade union backed third party political party that is laser focused on economic security for working people, would put massive pressure on the Democrats and Republicans alike.

Real freedom begins in the workplace, and economic freedom begins with a good union contract and political power comes from holding every politician accountable for each decision that goes against the wishes of the union membership and America's working families.

A handwritten signature in black ink that reads "John Samuelson". The signature is written in a cursive, flowing style.



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Fighting For Our Members, Reaching Strategic Goals

*By International Secretary-Treasurer
Jerome Lafragola*



When our leadership team came into office several years ago, we set a series of political and legislative goals for TWU. I am proud to say, that many of these goals are now victories, which have greatly boosted our members livelihoods and the industries where we represent them.

I want to highlight three recent critical points of inflection in our Unions history:

- When our country was devastated by the effects Covid-19, TWU was a leader in protecting our members jobs. We fought for and won \$47.3 billion investment into transit, airline, and Amtrak workers as part of the American Rescue plan. All of the money was directed into payroll for workers and in many cases it still prevents employers from laying off TWU members.
- Beyond the COVID-19 pandemic, TWU fought for the passage of the largest infrastructure investment in the history of our country through Bipartisan Infrastructure Legislation. By 2026, the federal government will be spending 45% more on transit than it did before this legislation became law. New grants for rail infrastructure will expand faster than any time since the 19th century. Since all these investments are all guaranteed, nothing will be pulled back if the government shuts down or an annual appropriations bill is delayed. The opportunities for worker growth and greater union density has never been higher.
- And as we prepare for the future, the TWU has led the fight to reform the way our government thinks about and invests in new technologies. The Department of Transportation announced new Innovation Principles which require new technologies to put workers' first and firmly rejects the notion that innovation is in and of itself a public good. New investments in zero-emission vehicles at transit agencies will come with workforce training to guarantee that TWU members are the first to benefit as we transition to the next generation of equipment. These victories will be advancing TWU members' lives for decades to come.

As we move forward in 2023, the TWU is laser focused on mitigating against profiteering airline carriers offshoring of aircraft maintenance work. TWU has taken the lead on the Global Improvement Safety Improvement Act and we are confident that this legislation will turn the tide, bringing many high quality aviation jobs back to the United States.

In closing, I am hopeful you and your families had a Merry Christmas and a blessed holiday season, and nothing but health and happiness in 2023.

"I am proud to say, that many of these goals are now victories, which have greatly boosted our members livelihoods and the industries where we represent them."

Local 100 Family Day Returns to Coney Island

After a two-year hiatus, Local 100 Family Day returned to Coney Island on September 10. Over 7,000 New York City Transit workers and TWU locals from New York enjoyed a day filled with food, fun and union solidarity. Check out the photos!



International Staff Changes

Several changes to International staff were made by the International Administrative Council at the Fall International Executive Council meeting held in Napa, California, October 4-6.

Gary Peterson will no longer be Air Division Director, he will be Executive Director to Office of the International President, filling the vacancy of Brendan Danaher. TWU Local 502 President Andre Sutton will be the new Air Division Director. However, there will be a four-six month transition period while both adjust to their new roles.

"This is a real privilege but it's going to be a challenge. Building unity among ourselves from within is what the TWU stands for,"

Sutton said. "It's a special occasion being part of the TWU and it will be hard to fill Gary's shoes."

TWU International Representatives for the TUUS Division, Carl Martin and Theotis James, retired effectively at the end of October (see p. 15 for more). Filling in their roles are Local 291 President Jeffrey Mitchell and Local 220 President Christina Scott.

"Thank you. This is a great honor and I look forward to working with everybody," Scott said.

Mitchell added, "Thank you all. It is a privilege to be part of the TWU. I've worked with other unions, and they are not structured like we are. It is truly a blessing."

Local 550 Swear In

New Executive Board members for Local 550 – Southwest Airlines Aircraft Dispatchers – were sworn in by International Rep. Jose Galarza. They began their three-year term July 1.

Pictured from left to right: Bill Kalivas- SOD Rep, Stefanie Alexander- Dispatch Rep, Kevin Thurston- At-Large Rep, Jeff Jackson- Vice-President, Brian Brown-President, John DiPaolo- Recording Secretary, Anthony Zangrilli- Treasurer, Brian Prelesnik- Special Rep, Chris Lester- At-Large Rep and John Gordon- Dispatch Rep.



IN MEMORIAM

TWU Communications Director Denise Romano



The Transport Workers Union of America, and the labor movement more broadly, lost a fierce fighter, sister, and friend when Denise Romano, Director of Communications for the TWU, passed away tragically and unexpectedly on November 27, 2022; at just 38 years old.

Denise believed passionately in workers' rights and in TWU's vision of a world where every worker has access to the life-changing power of a union contract. Since 2018, she proudly served the TWU and our members, leading communication campaigns against the nation's largest air rail, and transit companies; while helping educate to TWU members and the public about the dangers of unregulated, profit-driven autonomous technology.

Prior to joining the TWU, after graduating with a degree in Print Journalism from Brooklyn College, Denise served as Communications Specialist for the American Postal Workers Union. There she assisted in the victorious Stop Staples campaign and helped spearhead A Grand Alliance to Save Our Public Postal Service and the Campaign for Postal Banking.

Denise will be remembered for her vibrant and outgoing personality, zest for life, and ability to make people from all walks feel welcome in her presence.



TWU Local 556 members picket in Houston



TWU Local 556 Holds Nationwide Day of Action

On September 27, TWU Local 556 held a Nationwide Day of Action to spread awareness of the deteriorating working conditions being experienced by Southwest Airlines Flight Attendants.

Informational pickets were held at airports in Atlanta, Chicago, Denver, Las Vegas, Oakland, Phoenix, Baltimore, Denver, Dallas, Houston and Los Angeles. Out of an abundance of caution, due to Hurricane Ian, the Orlando picket was rescheduled to December 16. The pickets dominated headlines the next day, covered by national news outlets.

Local 556 is currently at the bargaining table with Southwest. They expect the airline to agree to a contract that:

- Pays Flight Attendants for time worked.
- Allows Flight Attendants time to safely rest when not working.

- Gives Flight Attendants control over their personal schedules when not at work, allowing them the liberty they deserve.
- Provides access to food and a safe place to sleep when traveling on the job.
- Fixes the technology failures that disproportionately impact frontline aviation workers and passengers.
- Creates a modern Reserve system that meets the needs of personnel and the operation, and ends the unsafe practice of 24-hour on call.
- Provides benefits that actually help Flight Attendants, like health insurance when we need it, including when we're injured on the job, battling cancer, or just had a baby.

For more info, visit makeitrightswa.org/.



Building a Pro-Labor Congress

The 2022 elections have delivered one of the narrowest margins between parties in Congressional history. Democrats will control the Senate by one vote or less and Republicans will control the House by just a handful of seats. While this split control of the legislative branch is sure to frustrate partisans, the TWU and the Labor movement were able to deliver solid, pro-worker majorities in both chambers. Combined with the most pro-union Presidential Administration in decades, TWU members can expect continued wins in Washington, DC.

Raising wages, increasing access to good jobs, and raising the level of safety in our transportation systems do not need to be partisan issues. The TWU has been working for years to build support among both parties for our issues and we are starting to see the results of those investments.

In October, 374 Members of Congress (218 Democrats and 156 Republicans) joined together to pass the *Global Aircraft Maintenance Safety Improvement Act* which would significantly decrease the threat of offshoring U.S. airline mechanic jobs. The Bipartisan Infrastructure Law, which increased the federal government's investment in transit and rail by historic margins, earned 68 votes in the Senate – including the support of both Democratic Leader Chuck Schumer and Republican Leader Mitch McConnell. Our agenda is making gains across the political spectrum.

TWU champions are fiercely advocating with their colleagues

on our behalf. Representative Don Bacon (R-NE), who has joined Local 223 union meetings and toured our union hall several times, is leading legislation to prevent assaults on transit workers, flight attendants, and other workers. Bacon will also be the Chair of the largest caucus of Republicans in Congress: the Republican Main Street Caucus whose members will make up nearly a quarter of the House.

Representatives Nicole Malliotakis (R-NY), Andrew Garbarino (R-NY), Brian Fitzpatrick (R-PA), and Chris Smith (R-NJ) have all led efforts to increase funding for public transportation and to protect jobs on Amtrak's Northeast Corridor. Our outreach to Republicans isn't just generating support but building a vocal group of allies who are making sure workers are a priority inside of their caucus.

Simultaneously, we have also increased our support among Democrats. Twice in 2021, we were able to hold every Senate Democrat in votes against expanding the use of autonomous vehicles on our roads. Bills to expand labor rights for both public and private sector workers have reached record levels of support. And not a single Democrat broke ranks to call for Congressional action to prevent a rail strike despite immense pressure from the other side. We are winning on all fronts.

For years, we've succeeded in the tough fights with just a righteous cause. The Labor movement is finally in a place where we can count on a majority to support us regardless of which party might hold the gavel. The TWU will continue to fight to make sure that both parties support working people and better the lives of our members.

Save the Date: 2023 Legislative & Political Conference

The TWU International invites all local representatives to promote, advance, and defend our union's goals before decision makers in Washington, DC at the Legislative and Political Conference July 9-July 13, 2023.

TWU leaders from around the country will come together to share best practices, empower one another, and make policy change in our nation's capital. The conference will be based at The Hyatt Regency (400 New Jersey Ave NW, Washington, DC 20001) in Washington, DC and include several trips to the House of Representatives and the Senate.

Details to follow, including a link to book your hotel and register for the conference, early next year. (The Government Affairs office will be able to schedule Hill appointments for those attending). Please mark your calendars and make plans to come to DC in July.

For the latest updates, visit www.twu.org.

Zack Tatz Named As A Top Lobbyist in 2022

Zack Tatz, TWU's Senior Director of Government Affairs, was named as one of Washington, D.C.'s top lobbyists of 2022 by The Hill. Zack's influence on Capitol Hill on behalf of TWU members has been invaluable, and he has helped secure major

legislative victories for the union in recent years. Zack led efforts to help save the airline, transit, and passenger rail industries from economic collapse during the COVID-19, and through his efforts the TWU continues to be a leader in the fight against unproven, profit-driven technologies in our transportation system. Congratulations to Zack on this well-deserved recognition!



Rep. Cherfilus-McCormick (D-FL-20)

Q. You have been a strong and vocal advocate to protect workers – especially transit workers – from assault on the job. What steps do you see Congress taking in the near future to make sure workers can do their jobs without fear of assault?

A. Assaults on transit workers have been a serious, long-standing issue across the United States. Thanks to the Bipartisan Infrastructure Law, the Federal Transit Administration (FTA) requires transit agencies to establish new safety committees, identify safety issues, and develop strategies to mitigate them. However, to further protect transit workers, Congress must take additional measures to update the FTA's data collection requirements to identify best practices and gauge how transit agencies are making improvements. Now is the time for transit agencies to dedicate the necessary resources to protecting their workers.

Q. Miami is a transportation center with tens of thousands of airline, transit, and railroad workers. What initiatives do you have planned to support this sector and protect transportation workers on the job?

A. First and foremost, Congress must pass the Protecting the Right to Organize (PRO) Act, a critical piece of legislation that I have supported. As you know, the PRO Act protects the basic right of workers to join a union. Unions help bring protections to countless numbers of workers across the country. The House passed the PRO Act in March 2021, but the bill has since stalled in the Senate. Congress must reintroduce and pass this consequential legislation during the 118th Congress so that President Biden can sign it into law.

Additionally, I believe that all transportation workers should be protected while on the job. Under current law, an assault on an Amtrak worker is not a federal crime. However, assaulting an airline worker is a federal crime. Disparities such as this must be addressed to bring federal



Rep. Cherfilus-McCormick (D-FL-20)

If it were not for the help of a local union, my family would not have known our rights. This experience taught me the importance of workers' rights and the right to organize. For decades, my family has been rooted in the labor movement. I will continue to advocate in Congress for the rights of workers and their families.

to his being diagnosed with brain cancer. He ultimately died from his diagnosis. Following my father's death, my mother fought to make sure my siblings and I were taken care of. If it were not for the help of a local union, my family would not have known our rights. This experience taught me the importance of workers' rights and the right to organize. For decades, my family has been rooted in the labor movement. I will continue to advocate in Congress for the rights of workers and their families.

protections to all transportation workers, and that is something I would like to move the needle on.

South Florida is an aviation center for many travelers who love to enjoy our beaches and our diverse culture. However, as we have seen, too many flight attendants are physically and mentally exhausted on the job. I was pleased to see that the Federal Aviation Administration (FAA) finalized a rule in October 2022 to require airline flight attendants to receive at least 10 hours of rest time between shifts. This commonsense approach not only helps build morale in the aviation sector but also keeps travelers safe. With the FAA reauthorization on the horizon, I want to support the implementation of more of these types of commonsense protections for transportation workers.

Q. What does the Labor Movement mean to you?

A. The labor movement is deeply personal to me. As a child, I watched my parents work hard to provide better opportunities for their children. After migrating to the United States from Haiti, my mother worked as a maid, and my father worked as a taxi driver and at a local printing press. Seeing them work tirelessly to provide for their family instilled the value of hard work in me at a young age. Unfortunately, I also saw the struggles they had. While working at the printing press, my father was exposed to harmful chemicals, which led



Historic: Local 579 Elects First Executive Board

TWU Local 579, representing JetBlue InFlight Crewmembers, elected their first Executive Board on October 28. Officers, board members and convention delegates are as follows:

Tyesha Best, President

Robert Hill, Vice President

Elizabeth Smith, Recording Secretary (elected by acclamation)

Steven Miller, Financial Secretary Treasurer

Rory Kimbrough, Executive Board Member At-Large

Jonathan Correa, BOS Executive Board Member

Tiffany Hume, EWR (elected by acclamation)

Michael Ullman, FLL Executive Board Member

Tanji Garcia, JFK Executive Board Member

Amber Pisco, LAX Executive Board Member

Joel Duran, MCO Executive Board Member
(elected by acclamation)

27th International Convention Delegates:

Stacy Bassford, **Cynthia Hawkins**,

Lyndi Howard, **Johnny Mathes**, **Brendan Moriarty**

Following the election results, officers met in Miami with International President John Samuels, International Executive Vice President Alex Garcia, International Administrative Vice President Mike Mayes, Executive Director to the Office of the President and International Vice President Gary Peterson, and Air Division Director Andre Sutton for a swearing-in ceremony, followed by officer training.



Flight Dispatchers at Republic Airways Overwhelmingly Ratify Contract

On October 31, Flight Dispatchers at Republic Airways overwhelmingly ratified a new, industry leading contract, with over 98 percent voting participation.

The contract sets a new, high standard for regional carriers. It includes pay increases of up to 24 percent and signing bonuses up to \$17,400.

Assault Won't Fly Campaign Goes to Chicago, Phoenix

The Assault Won't Fly (AWF) Campaign made a huge splash in Chicago with their action at Midway Airport on November 10.

"We have had flight attendants who have been hit, who have been grabbed to the point of bruising, some who've been followed off the aircraft and some who've been spirited away through the terminal because of threats," Local 556 First Vice President Corliss King told the Chicago Sun Times. "It needs to stop...Unless you're a boxer or a football player, nobody chooses to have violence as part of your day-to-day job."

Local 579 member Stacy Bassford, a flight attendant with Jet Blue, told the newspaper that has had a passenger grab her in the midsection and dig fingernails into her skin. Another passenger groped her. "It's dehumanizing," she said.

Local 577 Recording Secretary Klarissa-Ann Principe, a flight attendant with Allegiant Air, told the newspaper people get triggered in response to the simplest requests.

"Please put your seatbelt on. Please put your bag under the seat in front of you.' These things are met with 'I don't have to listen to you. I don't have to do that,'" Principe said.

Another AWF action was held in Phoenix on November 11 and other events were being planned as this issue went to press. Visit assaultwontfly.com for the latest updates.



10-Hour Rest Rule for Flight Attendants Finalized By FAA

Following the Federal Aviation Administration's announcement of a final rule requiring 10 hours minimum consecutive rest for flight attendants between working flights, TWU International President John Samuelson issued the following statement on October 4:

"We won the fight to guarantee flight attendants at least 10-hours of rest back in 2018 when Congress made this change. The TWU did not wait on the FAA; we led the way by securing 10 hours minimum rest at Southwest Airlines, for our Local 556 members, early this year. Today, the FAA has finally acknowledged that 10-hours of rest has to be a minimum for the hard-working flight attendants who keep us safe at 30,000 feet.

"Fatigued work is unsafe work. This long-overdue change will allow flight attendants the time they need to recover between duty days, in order for them to perform their jobs at full capacity. Especially as assaults continue at record levels and a 'full moon' atmosphere of unruly passengers has pervades the airline industry, this change is more important now than ever.

"Now that the FAA has completed work on this rule, and we hope that this means the agency is beginning to take Congressional directives more seriously. This FAA is now 10 years past-due on a rule to raise safety standards for aircraft maintenance and it still has many other changes to implement from the 2018 FAA Reauthorization. It's past time the FAA completes all of these rule changes, and the TWU continues to push the FAA and elected officials to do so."

Foreign Maintenance Bill Closes Safety Loopholes, Returns Jobs to the U.S.

For the first time in nearly 40 years, the U.S. House of Representatives passed a stand-alone, bipartisan bill to apply all FAA safety standards to certified aircraft maintenance facilities outside of the country. The TWU has led the fight to pass the Global Aircraft Maintenance Standards Improvement Act (formerly known as the Safe Aircraft Maintenance Act) since it was first introduced in 2019.

This bill would close loopholes that allow FAA-certified facilities abroad to operate at lower costs by ignoring safety standards around mechanic qualifications, background checks, random inspections, and other important rules.

The final vote of 374-52 showed overwhelming support for these changes and the TWU has renewed our calls for the Senate to take up and pass this legislation before the end of the year.

TWU and FRA Work Together to Keep our Members Work

After years of presenting grievances and trying to convince past Federal Rail Administrations (FRA) that CSX, Norfolk Southern, and Conrail were giving our members' work away to Train and Engine Crews, the present FRA Administration has listened and worked with us in putting a stop to it.

On September 26, 2022, FRA Administrator Amit Bose issued a letter to all seven Class 1 Railroads that this practice is to cease. In his letter, he wrote:

"The Federal Railroad Administration (FRA) sees evidence that railroads are curtailing mechanical and brake safety inspections by maintenance-of-equipment personnel, specifically carmen, while increasing reliance on inspections by railroad workers from other crafts (e.g., train and yard crews). Although, under certain circumstances, FRA's regulations allow for train and yard crews to be assigned to complete tasks customarily handled by maintenance-of-equipment personnel, a central premise of the inspection requirements in FRA's Motive Power & Equipment regulations is to ensure rail equipment periodically undergoes comprehensive inspection by individuals specially trained in the maintenance and repair of the equipment (i.e., maintenance-of-equipment personnel), who can properly determine whether the equipment is safe to operate.

"In particular, FRA is concerned that railroads have instituted certain practices that are inconsistent with the intent of FRA's freight car and brake system safety standards (49 CFR Parts 215 and 232). For example, FRA is aware that railroads may be intentionally holding trains outside of yards to have operating crews perform required mechanical inspections when maintenance-of-equipment employees are otherwise assigned to do so at yard locations. FRA is also aware of trains being held in "lost" or "ghost" tracks, where trains are physically on tracks within a yard, but not recorded in terminal data systems. Trains held on these "lost" or "ghost" tracks are treated essentially the

same as trains held outside of a yard, because they are inspected by other than maintenance-of-equipment personnel stationed within the yard. In the event maintenance-of-equipment employees do inspect the equipment, as the equipment is not properly recorded as being in the yard, they may not have access to relevant electronic safety data and tracking information, which can result in non-compliant equipment continuing beyond the location designated for mechanical inspection or repair. Moreover, the use of train crews to conduct inspections even when qualified maintenance-of-equipment personnel are available in a yard may violate FRA rules concerning the qualifications for performing required mechanical tests and inspections, notably the Class I brake test and inspection requirements (see 49 CFR 232.205(d)), and may add to the fatigue experienced by the train crews, by adding the burden of completing the trains' mechanical inspections, given crew shortages and longer hours, subject to the hours-of-service limits.

"Further, yarding trains allow mechanical teams, when given appropriate time to inspect trains, to identify alerts and warnings, and shop cars for inspection or repair due to previous identification by UMLER data, wayside detector input, or other means.

"FRA understands that the size of receiving yards can constrain the ability to yard trains for required inspections, but it should not be used to minimize proper train maintenance and inspection or manage terminal dwell data.

"The repeated performance of inspections, by employees or contractors who do not possess the same specialized training and experience as maintenance-of-equipment employees, raises concerns about the adequacy of the inspections and the potential impact on the safety of the equipment across the national rail network. FRA Motive Power & Equipment Inspectors will, therefore, redouble their focus on compliance with mechanical safety requirements, review mechanical inspection records, and pursue enforcement action as necessary.

"Accordingly, I ask for your cooperation in ensuring that rail equipment receives proper attention from maintenance-of-equipment employees to perform mechanical inspections. This will not only help promote the safety of the equipment, but also the safety of those employees who maintain and operate it—for the benefit of all who depend on the safety and reliability of the national rail network. An identical letter has been sent to each of the Class I Railroads."

This is a major turnaround in the opinion that past FRA Administrations have expressed on who is truly qualified to do the work.

"I want to thank all of our Local Presidents and members who have provided us with all of the information to win this fight. The TWU has not only won this for our members on CSX, NS, and Conrail but for all of the Carmen working on all seven of the Class 1 Railroads," said TWU Railroad Division Director John Feltz.

Amtrak Apprentice Program

Now in its sixth month, the Amtrak Apprentice program has been successful. There are still 30 months to go to complete this program.

The apprentices are now in the On-the-Job segment of the program. At the end of the three-year program, we will have a combination of nine Journeywomen and Journeymen Car Mechanic/Inspectors. Amtrak has hired a combined total of 33 Coach Cleaners and Car Mechanics at our Beech Grove Shop Facility.

STATE CONFERENCES

Illinois State Conference Meets with Local Leaders

Illinois State Conference members met with Illinois leaders to discuss issues that mean most to workers. Pictured with the group is Lindsey LaPointe, 19th District State Representative; Lakesia Collins, 9th District State Representative; and Celina Villanueva, 11th District Senator.



Colorado/Hawaii State Conference Holding the Line

Colorado/Hawaii State Conference Chair Abilio Villaverde at a picket in Oakland and Colorado/Hawaii State Conference Co-Chair Jamie Simpson at a picket in Denver.



DC/Maryland/Virginia State Conference GOTV

Damion West, Chair of the DC/Maryland/Virginia State Conference, attended an event with Democratic Candidate for Maryland Governor Wes Moore.

Also pictured are: Alyssa Baiyina, Gerald Jackson, Secretary Treasurer Maryland State and DC AFL-CIO; Donna S Edwards, President Maryland State and DC AFL-CIO, Kerry Killeen and Osha Stegall.



New York/New Jersey State Conference Interviews Candidate

The NY/NJ State Conference interviewed candidate Robert Menendez Jr. who was running for election to the U.S. House to represent New Jersey's 8th Congressional District. As this issue went to press, he was winning the seat.

TUUS Local President Q & A

Each TUUS Update includes a Q & A where we hear from different local presidents. TUUS Division members should stay tuned to hear from their presidents in future issues. This issue features Local 1 President Wayne Cole, based in Akron, Ohio.

Q: What's the biggest issue facing your local right now?

A: The biggest issue our local currently has is financial security, however, I'm very confident in our union board and recording/secretary treasurer to overcome this!

Q: What do you think makes your local unique?

A: We are and always will be unique as local # 1, but more importantly I've never experienced more racial harmony here, we are all family and I love that energy!!

Q: What advice do you have for members who want to get more involved with their local, but are hesitant?

A: For members that want to get involved, please



Local 1 President Wayne Cole and Local 1 Vice President April Adams at the AFL-CIO Banquet in Akron, Ohio in October.

come to our monthly union meetings, that's a perfect start! And honestly, if you want to help and support your local union, don't regurgitate everything you hear. Ask your local rep first.

Teambuilding at TUUS Training in Miami

Leaders of the TUUS Division met in Miami, October 24-27, for four days of in-depth "Strategic and Disciplined" training.

Since International Reps Carl Martin and Theotis James are retired as of midnight October 31, (see p. xx) the opportunity was seized to provide some insight and guidance to incoming International Reps: Local 220 President Christina Scott and Local 291 President Jeffrey Mitchell.

International Administrative Vice President Curtis Tate, TUUS Division Director Willie Brown and Attorney Mark Richard led the stacked agenda for the attendees, which included International President John Samuelsen; International Secretary-Treasurer Jerome Lafragola; Executive Director to the President Gary Peterson; International Reps Cassandra Gilbert, Jose Cruz, Jeff Mitchell, Christina Scott, Carl Martin and Theotis James; TUUS and Railroad Division Administrative Professional Shavon Gibson; TWU Motorcoach Operator Izzy Landau; TWU GSAP Representative Mitch Lieberman; COPE Director Andrew Rangolan; Organizing Director Angelo Cucuzza, Accounting Director Justin Rogers and Communications Director Denise Romano.

The training – which included group and breakout sessions - was interactive, dynamic and intense. Topics included:



- A mapping of the TUUS Division
- Reviewing the TWU Constitution
- Presentations from the Communications, Research, Accounting, COPE and Organizing Departments
- The TWU's fighting spirit and organizing capacity
- In-depth review of the Rep job description
- Connecting and establishing meaningful relationships with locals
- Building team unity
- Leadership Skills

"We have to juggle a whole bunch of balls at one time, but we don't want to drop any," noted Tate.

Martin added that the demanding job is made a bit easier because, "Management doesn't get along like we do."

Psychologist Eric Goldstein, who works with college athletes around the country, gave a lively presentation on the final day on how to better be "A Staff Leader" with lessons in "practical leadership."

"Sometimes I move up, but how do I lead?" he said. "You will receive the greatest outcome if you provide a positive work environment. You need clear communication and have to treat others with respect to help them grow."



Farewell, Friends: International Reps Carl Martin & Theotis James Retire

With decades of dedicated service under their belts, TUUS Division Reps Carl Martin (Local 171) and Theotis James (Local 208) are retiring.

"This is a well-earned vacation. God bless the TWU for letting us walk away with dignity in our retirement and fighting for employer pensions and retirement security," said International President John Samuelsen. "Congratulations, stay healthy, beat the odds, and find someone to fight with."

"They might not be physically on the clock but what they have done for us and with us will stay with us," International Administrative Vice President Curtis Tate added. "Friendship is not bound by employment or location. They earned the next phase of their lives, but by no means is this a good-bye. Until we hook up again."

During the TUUS Training in Miami, Martin and James sat down for an emotional, informal panel discussion, distributing advice for incoming Reps.

Martin has been a card-carrying union member since he was 19 years old, working as a mechanic for UAW. He joined the TWU in Ann Arbor, Michigan, in 1987, even though he was "told right away not to get involved with the union as they were a bunch of radicals." Within six months, Martin was approached by local leadership to join the executive board and was appointed to a Vice Presidents position in the Maintenance Department. At the end of 1992, he ran for president of the local and was re-elected twice. In 2001, Martin was appointed to the International Executive Board and served as a staff rep. In 2005, he was appointed to the International Executive Council and Transit Division Director, which he served for two years and then was appointed an International Vice President in 2012. Martin was also a member of the Appeals Committee.

"Build relationships with the locals. Stay loyal. Be honest with yourself and your directors. Don't ever bluff. Stay focused, believe in



yourself," Martin said, noting that he defines his job as, "Helping people as a labor leader. Helping people who can't help themselves."

"I don't want to leave now because there is unfinished work, but this group here I don't doubt for a minute that they can carry on and do better. They are starting out with more than we had," Martin continued. "They are brighter and smarter than I was when I started here. They are very capable and able."

James became a Bus Operator in Columbus, Ohio, in 1985 and got involved with the union the following year during a strike. After the strike ended, he became a union steward for about six years and was elected as a member of Local 208's executive board for three years, vice president for three years and president for nine years. He was also the Chair of the Ohio/Michigan State Conference. James was appointed to the International in March 2009, working in the Legislative and Political office and in 2010 he began working with the Transit Learning Center on behalf of the TWU while servicing transit locals across the country.

James is also active with the Central Ohio Labor Council, holding the positions of recording secretary, executive vice president and is now currently president of the Central Ohio Labor Council. He is also a vice president on the Ohio AFL-CIO Executive Board.

"I would do it all over again. It was a wild ride. I was shocked at the opportunity in 2009 when I came on," James said, noting that if it was not for this job, he would not have had "a lot of experiences and would not have seen any places."

"No doubt in my mind that the good folks in place will move the needle. Your health and family come first. You can come back to this, but you have to take care of your health," he explained. "But you can't do it if you're laying in a bed somewhere because you didn't keep your appointment. You have to strike a balance. The work will consume you, but we want to make sure it doesn't spit you out."

TWU Members GOTV for Midterm Elections

TWU members from coast-to-coast worked hard to get out the vote for candidates who are loyal to working families. Check out the action!



Local 291 member Angie Dowtin, APWU member Wanda Graibe and Local 568 member AC Castillo before canvassing in Miami.



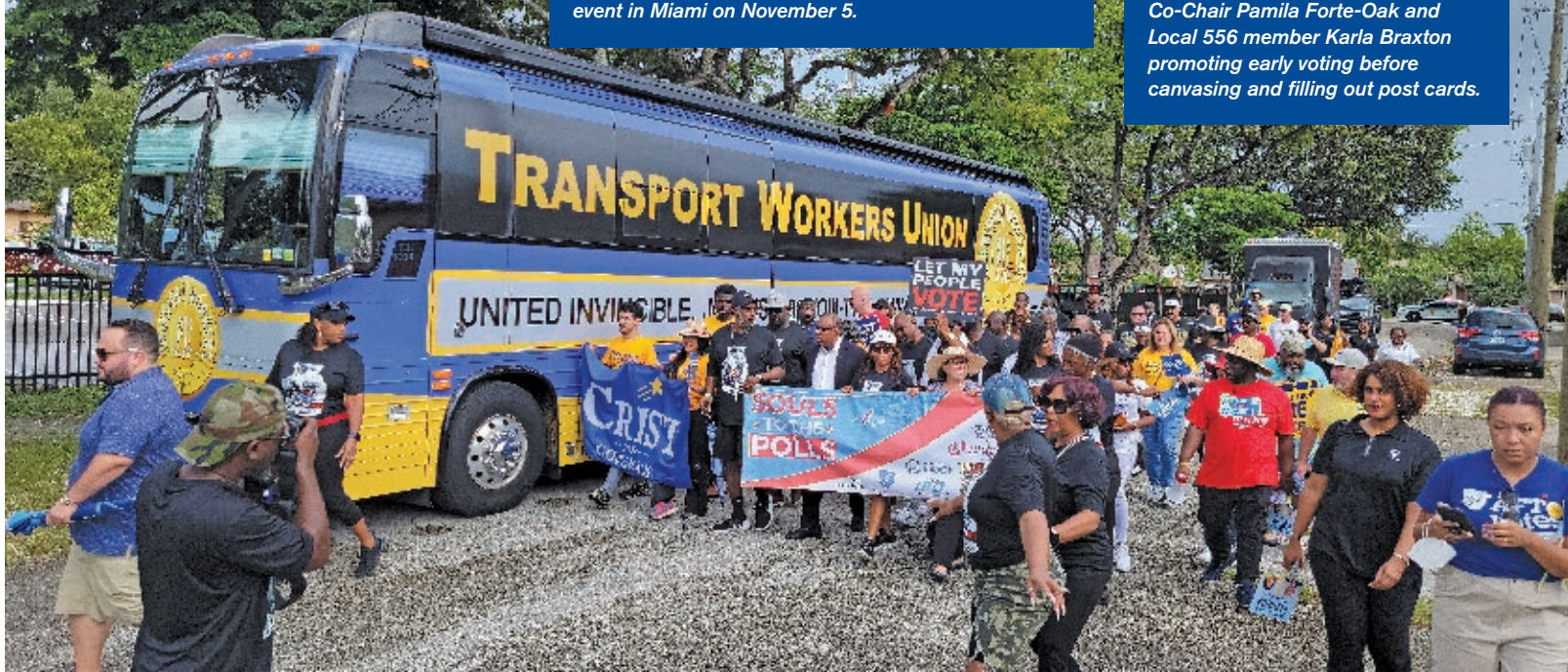
Local 527 President Benyoel Morgan, Local 527 retiree Willie Blackmon, Local 239 President Lisa Johnson, Local 527 Recording Secretary Tracy Clark, Local 527 member Belinda Houston, AFL-CIO Organizer Patrick Scott and Local 239 President Yolanda Brown.



TWU Local 291 showed up at the Souls to the Polls event in Miami on November 5.



TWU Georgia State Conference Co-Chair Pamila Forte-Oak and Local 556 member Karla Braxton promoting early voting before canvassing and filling out post cards.



MEMBERS IN ACTION



Members of the Georgia State Conference GOTV for Gov. Raphael Warnock and Stacy Abrams.



Local 568 member AC Castillo with Secretary of Labor Marty Walsh



TWU Local 234 President Brian Pollitt; Pennsylvania Governor-Elect Josh Shapiro, TWU Local 234 Secretary-Treasurer Joe Coccio and Rep. Dwight Evans on the morning of Election Day at Local 234's Hall.



Local 513 Legislative Rep John Gardner, Terry Meza TX HD 105, Julie Johnson TX HD 115, Local 513 President Greg Cozey and Local 513 Legislative Rep James Culpen



TWU 556 Members Marlene Cardona, Krystal Yore-Evans, Ray Soria and Enid Spotser GOTV in Illinois for Worker's Rights.



TWU Local 556 member Maria Teresa Hank dedicated her time and talents to help secure working-class victories in Nevada. Here she is pictured with Las Vegas Flight Attendant Eve Kaganovitch.



Julio Ceron from the Transportation Trades Department wore some TWU Local 234 gear while getting out the vote.

Women in Nontraditional Workplace Roles: Karen Hanback, Local 2003

In our latest TWU Express series, "Women in Nontraditional Workplace Roles," we interview TWU members who are women performing jobs traditionally done by men. Each issue will feature a Q&A with a member. This time it's Local 2003 member Karen Hanback, a Journeyman Carman at Amtrak. She is based in the Beech Grove, Indiana Shop.

Can you give an overall view of the job you perform?

I'm a Journeyman Carman. I work on passenger train cars. I inspect, repair, and rebuild train car equipment and components.



What made you decide to go

into this craft? I applied for a Carman craft position because I had just recently lost my job due to a plant closing. The job that I lost was a union job with good wages and benefits. I worked on diesel engines, and I had an inspection, assembly, and repair background. I felt that the Carman craft was a good fit for me. The Carman craft was also a union job with good wages and benefits and had similar required work experience.

Are there any huge obstacles that you would

like to share? At age 19, I began working at Battery Manufacturing Company which was male-dominated. I remember a couple of male coworkers being very rude to me when I first hired in as an employee. Being an only child, I learned at a young age to stand up for myself. I'm not afraid to speak up when I need to. I feel that it's better to address a bad situation immediately, before it gets out of hand. Most of the coworkers treated me well and were always helpful. I remained with this company for about 15 years until the plant closed.

Do you have any advice for young women wanting to go into your craft?

My advice would be to choose the craft that you are most interested in, research the craft well, and make sure that this is your career choice. Contact the craft's union and ask them if they could give you some helpful advice about the particular

craft that you are interested in. Gain craft knowledge through attending a trade school, an apprenticeship program, or even hand on experience. Set your goals and how to plan to accomplish them. Write down an action plan and follow it. Don't allow anyone to discourage you or stand in your way of achieving your goals. Don't be afraid of failing, learn from your mistakes. The time is now to achieve your dream, don't delay. There'll never be a perfect time. Achievement will not be an easy task; you will need to stay focused and work hard. Remember, you can accomplish anything that

you set your mind and heart to. All the hard work and dedication will be well worth it in the end!

What do you do for fun outside of work?

I enjoy spending time with my family and my three grandchildren. Up until this past summer, we had a small farm. We enjoyed owning and spending time with our Tennessee Walking Horses. In the past, we raised several colts each year and had fun showing horses. Ever since I was a child, I was an avid horse lover. This past summer we sold our home and our horses and have downsized to a smaller place. I'm preparing for retirement next year. I do miss my horses! We recently got a new baby kitten named Gabby. I enjoy spending time with her, she is a lot of entertainment. I also enjoy watching movies and going on vacation.

Is there anything else you'd like to add? I have always worked for unionized employers. I first was a URW union employee, then years later a UAW union employee, and presently I'm a TWU union employee at Amtrak located in Beech Grove, IN. I have always been proud to be a union member. Unions work hard to negotiate with companies for better wages, benefits, training for workers, and safer employee working conditions. Unions improve job quality. I feel that unions keep the companies honest!

TWU Local 512 Awards

The TWU Local 512 Executive Board distributed the William G. Linder award for Outstanding Steward to Bid Coordinator Randy Barthel and former EAP Coordinator Luis Trevino.



TWU Members Meet Secretary Buttigieg at O'Hare

TWU Local 512 President Juan Elvira, Local 571 President Moisley Pawa and Local 572 President Council Creech met with Secretary of Transportation Pete Buttigieg at O'Hare International Airport to discuss airline worker's needs. Secretary Buttigieg personally thanked TWU members for their efforts.



Local 220 Members Honored

Members of Local 220 who serve as EMS workers for the Brick Township Police Department were selected as the Prehospital Program of the Year for 2022 at the New Jersey State EMS Awards on November 5. These dedicated workers were recognized for all the ways they positively impact the community of Brick, New Jersey, and the entire state.

Future Leaders from All Divisions Rally with Flight Attendants at Midway Airport, Learn Negotiation Skills

The Fall Future Leaders Organizing Committee (FLOC) meeting for the first time included future leaders from all three divisions: Air, as well as TUUS and Rail. The three-day event was hosted by Local 571 in Chicago, with members from Locals 100, 208, 225, 252, 260, 264, 291, 501, 502, 512, 513, 514, 550, 555, 568, 571, 575, 556, 591, and 2014 participating.

Negotiating a strong union contract requires skill and strategy, and Gary Peterson, Director of TWU's Air Division, broke it down for future leaders at the meeting.

In addition to learning the best tactics for successful contract negotiations, FLOC members showed solidarity with TWU Local 556 flight attendants at Midway Airport who recently entered mediation in their contract fight with Southwest Airlines.

The next FLOC meeting is scheduled to take place in March, hosted by Local 514.





Intl Rep Jose Galarza, Cesar Rosario, Lawthaniel Hudley, Chris Kiernan, Denmark Masumotu, Binh Nguyen and Luis Mercado

New Veteran's Committee Members Receive Challenge Coins

The TWU Veteran's Committee held their Fall meeting in Tulsa, Oklahoma, September 27-29.

New committee members were appointed and presented with Challenge Coins. They include:

- Martin Castro, Local 568
- Binh Nguyen, Local 513
- Lawthaniel Hudley, Local 575
- Cesar Rosario, Local 575
- Denmark Masumotu, Local 513

For the latest Veteran's Committee updates, visit veterans.twu.org/.



Martin Castro, Binh Nguyen, Lawthaniel Hudley, Cesar Rosario and Denmark Masumotu



Scott Chisum, Local 514 and Kristy Chisum, DAV Coordinator

For the latest news & updates, visit www.twu.org



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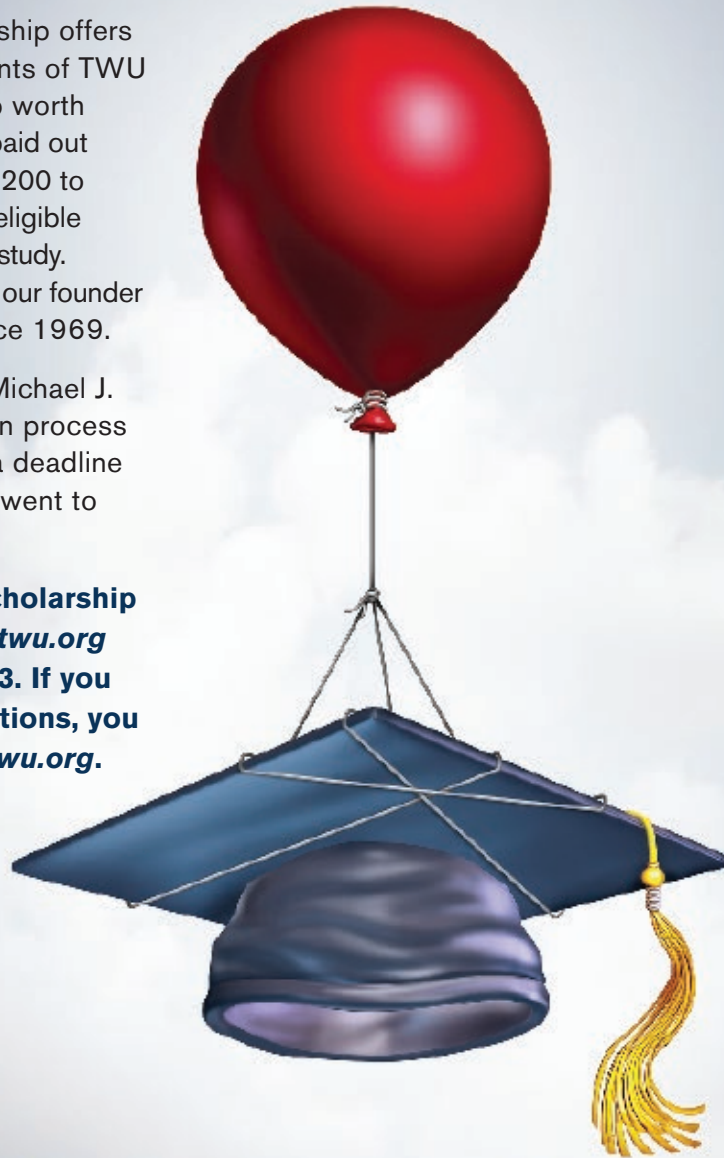
COMING SOON

The 2023 Michael J. Quill Scholarship Applications

The Michael J. Quill scholarship offers 15 college-bound dependents of TWU members with a scholarship worth \$4,800. This scholarship is paid out per year in the amount of \$1,200 to winners who continue to be eligible over their four-year course of study. The union has been honoring our founder with these scholarships since 1969.

Preparations for the 2023 Michael J. Quill Scholarship application process are already underway, and a deadline was being set as this issue went to press.

Updates regarding the scholarship will be available at www.twu.org beginning in January 2023. If you have any additional questions, you can email scholarship@twu.org.



INDEPENDENT AUDITORS' REPORT

To the International Executive Board and International Executive Council
Transport Workers Union of America 1220 19th Street, NW, Washington,
D.C. 20036

I have audited the accompanying Statement of Calculation of Chargeable and Non-Chargeable Expenses (modified cash basis) of Transport Workers Union of America (a nonprofit organization) for the year ended August 31, 2022, and the related notes to the statement.

Management's Responsibility for the Financial Information

Management is responsible for the preparation and fair presentation of this statement in accordance with the modified cash basis of accounting as described in Note 1b; this includes determining that the modified cash basis of accounting is an acceptable basis for the preparation of this statement in the circumstances. Management is also responsible for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of the statement that is free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

My responsibility is to express an opinion on the statement based on our audit. I conducted my audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that I plan and perform the audit to obtain reasonable assurance about whether the statement is free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the statement. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the statement, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the statement in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, I express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the statement.

I believe that the audit evidence I have obtained is sufficient and appropriate to provide a basis for my audit opinion.

Opinion

In my opinion, the Statement of Calculation of Chargeable and Non-Chargeable Expenses, referred to above presents fairly, in all material respects, the chargeable and non-chargeable expenses of Transport Workers Union of America for the year ended August 31, 2021 in accordance with the modified cash basis of accounting described in Note 1b, in conformity with the Transport Workers Union of America Agency Fee Policy.

Basis of Accounting

I draw attention to Note 1b, which describes the basis of accounting. The Statement of Calculation of Chargeable and Non-Chargeable Expenses was prepared on the modified cash basis of accounting, which is a basis of accounting other than accounting principles generally accepted in the United States of America. My opinion is not modified with respect to this matter.

Report on Supplementary Information

My audit was conducted for the purpose of forming an opinion on the Statement of Calculation of Chargeable and Non-Chargeable Expenses as a whole (modified cash basis). The supplementary information (modified cash basis); statement of main office expenses, statement of servicing, negotiations and grievance expenses and statement of salaries and related expenses on pages 9, 10 and 11 is presented for purposes of additional analysis and is not a required part of the Statement of Calculation of Chargeable and Non-Chargeable Expenses. Such information is the

responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the Statement of Calculation of Chargeable and Non-Chargeable Expenses. The information has been subjected to the auditing procedures applied in the audit of the Statement of Calculation of Chargeable and Non-Chargeable Expenses and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the statement or to the statement itself and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In my opinion, the information is fairly stated in all material respects in relation to the Statement of Calculation of Chargeable and Non-Chargeable Expenses as a whole.

Intended Use of Report of Independent Auditors

This report is intended solely for the information and use of the Transport Workers Union of America and its agency fee payers and is not intended to be and should not be used by anyone other than these specified parties.

TRANSPORT WORKERS UNION OF AMERICA AGENCY FEE POLICY

STATEMENT OF CALCULATION OF CHARGEABLE AND NON-CHARGEABLE EXPENSES (MODIFIED CASH BASIS) YEAR ENDED AUGUST 31, 2022

	TOTAL	CHARGEABLE	NON-CHARGEABLE
Main office expenses	\$ 2,418,548	\$ 2,208,229	\$ 210,319
Servicing, negotiations and grievance expenses	5,379,201	5,379,201	-
Political expenses	704,341	-	704,341
Organizing expenses	595,220	-	595,220
Affiliation fees	967,915	-	967,915
TWU Express: Non-political information	211,428	211,428	-
Political information	86,484	-	86,484
Donations, tickets and advertisement	852,754	-	852,754
Salaries and related expenses	12,286,712	10,376,707	1,910,005
Convention expenses	3,055,477	3,055,477	-
Quill scholarship	94,700	-	94,700
Insurance	107,644	107,644	-
Investment expenses	349,780	349,780	-
Totals	\$ 27,110,204	\$ 21,688,466	\$ 5,421,738
Percentage to total	100.00	80.00	20.00

See independent auditors' report and notes to statement of calculation of chargeable expenses.

NOTES TO STATEMENT OF CALCULATION OF CHARGEABLE AND NON-CHARGEABLE EXPENSES AUGUST 31, 2022

Note 1 - Summary of Significant Accounting Policies

a. Basis of Presentation – The accompanying statements were prepared for the purpose of determining the fair share cost of expenses incurred by the Transport Workers Union of America (the Union) for employees represented by, but not members of, the Union and its

affiliated local unions. The accompanying statements are not intended to be a complete presentation of the Union's financial position or changes in its net assets in accordance with generally accepted accounting principles.

b. Principles of Accounting – The Union prepares its financial statements on the modified cash basis of accounting, which is a comprehensive basis of accounting other than accounting principles generally accepted in the United States of America. Under the modified cash basis of accounting, revenues are recognized when received rather than when earned and expenses are generally recognized when paid rather than incurred.

c. Income Taxes – The Union is exempt from Federal income taxes under Section 501(c)(5) of the Internal Revenue Code.

d. Retirement Plan – The Union contributes to a non-contributory defined benefit pension plan for the benefit of eligible employees not covered by other union plans.

e. Depreciation – Property and equipment is stated at cost and is depreciated under the straight-line method over the estimated useful lives of the assets.

f. Use of Estimates – The preparation of financial statements in conformity with generally accepted accounting principles and the modified cash basis requires management to make estimates and assumptions that affect the reported amounts of expenses during the reporting period and the allocation of chargeable and non-chargeable expenses. Actual results could differ from those estimates.

Note 2 – Agency Fee Policy

Any Transport Workers Union of America represented nonmember employee, whether publicly or privately employed who is subject to a union security clause conditioning continued employment on the payment of dues or fees, has the right to become an objector to expenses not related to collective bargaining, contract administration, grievance adjustment or other chargeable expenses. A current Transport Workers Union of America member who chooses to become an objector, must assume nonmember status prior to filing an objection. An objector's fees shall be calculated in accordance with Agency Fee Policy.

Note 3 – Agency Fee Policy chargeable expenses

The following categories of expenses are chargeable to objectors to the extent permitted by law.

- a. All expenses concerning the negotiation of agreements, practices and working conditions.
- b. All expenses concerning the administration of agreements, practices and working conditions, including grievance handling, all activities related to arbitration, and discussions with employees in the bargaining unit or employer representatives regarding working conditions, benefits and contract rights.
- c. Convention expenses and other normal Union internal governance and management expenses.
- d. Social activities and Union business meeting expenses.
- e. Publication expenses to the extent coverage is related to chargeable activities.
- f. Expenses of litigation before the courts and administrative agencies related to contract administration, collective bargaining rights or other chargeable activities.

g. Expenses for legislative, executive branch and administrative agency activities on legislative or regulator matters related to the negotiation or administration of contracts and working conditions.

h. All expenses for the education and training of members, officers and staff intended to prepare the participants to better perform chargeable activities or otherwise related to chargeable activities.

i. Other costs of activities related to group cohesion and economic action of or by TWU represented employees, e.g., demonstrations, general strike activity, informational picketing, etc.

j. Overhead and administrative expenses related to or reflective of TWU or TWU Local Union chargeable activities.

Note 4 - Agency Fee Policy non-chargeable expenses

Expenditures in the following categories arguably are non-chargeable to nonmember objectors to the extent permitted by the law.

- a. Community service and charitable contributions.
- b. Affiliations with non-TWU organizations.
- c. Support for political candidates.
- d. Member-only benefits
- e. Lobbying to the extent not chargeable as per Note 2g above.
- f. Publications, litigation and for overhead and administration to the extent related to arguably non-chargeable activities.
- g. External recruitment of new members.

Note 5 - Significant Factors and Assumptions Used in the Allocation Between Chargeable and Non Chargeable Expenses

a. Salaries and Related Expenses – Salary expenses for officers, clerical and administrative staff have been allocated between chargeable and non-chargeable activities based on time spent by personnel on such activities. Payroll taxes and workers compensation insurance are allocated based on salary allocations. Pension and welfare expenses are allocated based on employee participation in the pension plan and salary allocations.

b. TWU Express – The expenses related to the publication of the TWU Express are allocated between chargeable and non-chargeable based on the specific content of articles in the publications as determined by the editorial department. Expenses allocable to articles that are political in nature are 100% non-chargeable.

c. Legal, Accounting and Other Professional Fees – These expenses that are directly related to specific projects are allocated to those departments based on chargeable percentages of those departments except that any expenses primarily for non-chargeable expenses are 100% non-chargeable.

d. Organizing and Political Expenses – Organizing expenses are 100% non-chargeable. Political expenses that are not otherwise chargeable under Note 3g above are 100% non-chargeable.

e. Affiliation fees – Affiliation fees paid to non-TWU organizations are 100% non-chargeable.

f. Main Office Expenses – These expenses are directly allocable to chargeable or non-chargeable activities or allocated to non-chargeable activities based on salary expense allocations described in Note 5a above or any other method that is reasonable in the circumstances.

Note 6 - Union Locals — Agency Fee Policy

Effective with an amendment to the “Agency Fee Policy” adopted by the International Executive Committee on September 19, 1996, any Union Local that is required by law to have an agency fee policy, but which has failed to adopt such a policy, shall be deemed to have adopted the Agency Fee Policy of the Transport Workers Union of America and shall be deemed to have spent the

same percentage of its expenses on chargeable activities as the International.

Note 7 - Subsequent Events Review

Subsequent events have been evaluated through December 6, 2021, which is the date the statement was available to be issued. There were no subsequent events requiring adjustment to or disclosure in the accompanying statements.

**TRANSPORT WORKERS UNION OF AMERICA AGENCY FEE POLICY
SUPPLEMENTARY STATEMENT OF MAIN OFFICE EXPENSES
(MODIFIED CASH BASIS) YEAR ENDED AUGUST 31, 2022**

EXPENSES	TOTAL	CHARGEABLE	NON-CHARGEABLE
Rent and related expenses	\$ 729,977	\$ 648,514	\$ 81,463
Stationary and printing	152,329	135,614	16,715
Outside consultants	509,630	505,896	3,734
Telephone	125,909	111,234	14,675
Postage	40,353	36,340	4,013
Data processing expense	193,036	169,807	23,229
Equipment rental and maintenance	92,899	82,278	10,621
Subscriptions	134,063	117,855	16,208
Accounting	238,961	229,337	9,624
Depreciation	149,922	126,280	23,642
Miscellaneous expenses	51,469	45,072	6,397
Totals	\$ 2,418,548	\$ 2,208,229	\$ 210,319

See independent auditors’ report and notes to statement of calculation of chargeable expenses.

**TRANSPORT WORKERS UNION OF AMERICA AGENCY FEE POLICY
SUPPLEMENTARY STATEMENT OF SERVICING, NEGOTIATIONS AND GRIEVANCE EXPENSES
(MODIFIED CASH BASIS) YEAR ENDED AUGUST 31, 2022**

EXPENSES	TOTAL	CHARGEABLE	NON-CHARGEABLE
Negotiation expenses	\$ 1,669,765	\$ 1,669,765	\$ -
Legal fees	1,019,336	1,019,336	-
Transportation and facility costs	2,018,488	2,018,488	-
Reimbursement of Locals negotiating expenses	671,612	671,612	-
Totals	\$ 5,379,201	\$ 5,379,201	\$ -

See independent auditors’ report and notes to statement of calculation of chargeable expenses.

**TRANSPORT WORKERS UNION OF AMERICA AGENCY FEE POLICY
SUPPLEMENTARY STATEMENT OF SALARIES AND RELATED EXPENSES
(MODIFIED CASH BASIS) YEAR ENDED AUGUST 31, 2022**

EXPENSES	TOTAL	CHARGEABLE	NON-CHARGEABLE
Salaries	\$ 7,151,722	\$ 6,023,909	\$ 1,127,813
Pension and welfare expenses	3,925,603	3,300,945	624,658
Payroll taxes	528,018	444,751	83,267
Auto expenses	656,202	585,904	70,298
Insurance, workers compensation	25,167	21,198	3,969
Totals	\$ 12,286,712	\$ 10,376,707	\$ 1,910,005

See independent auditors’ report and notes to statement of calculation of chargeable expenses.

TRANSPORT WORKERS UNION OF AMERICA

TWU's Policy on Agency Fee Objections, as amended, is based upon decisions of the United States Supreme Court.

1. **Employees who are members of TWU are eligible to engage in a broad range of activities by virtue of their membership. This includes, for example, the right to run for and vote in Union elections, to vote on ratification of collective bargaining agreements, and to attend and participate in Union meetings and activities that are pertinent to their employment. Employees represented by TWU can elect to be non-members, but if they do, they lose these and other rights and benefits that go along with membership in good standing in TWU.**
2. A TWU-represented nonmember employee who is subject to a union security clause conditioning continued employment on the payment of dues or fees – referred to as “agency fees” for nonmembers – has the right to object to expenditures by TWU or the employee’s Local Union that are not related to collective bargaining, contract administration, grievance adjustment or other expenditures that are considered “chargeable” to nonmember objectors. A nonmember objector’s agency fees shall be calculated in accordance with this Policy.
3. To become an objector, a TWU-represented nonmember employee shall notify the International Secretary Treasurer in writing of her/his objection by mail postmarked during the month of January in the first year for which the employee elects to be an objector. The written notification shall be signed by the employee and include the objector’s current home address and TWU Local Union number, if known. The nonmember objector shall also mail a copy of this notice to her/his Local Union. A nonmember employee who first becomes subject to a TWU union security clause after January in a particular year and who desires to be an objector must submit written signed notification to the International Secretary Treasurer, with copy to the employee’s Local Union, including the objector’s current home address and TWU Local Union number, if known, within thirty (30) days after the employee has become subject to union security obligations and been provided notice of these procedures.
 - a. A current TWU member who chooses to become an objector, must first resign from TWU membership before she/he can file an objection through these procedures. A member who resigns from membership during the course of the year shall have 30 days following resignation in which to elect to become an objector by utilizing the procedures set forth in paragraph 3 above.
 - b. A TWU-represented nonmember employee, who provides notice in accordance with the procedures set forth in paragraph 3 above, will be considered an objector for each subsequent calendar year after the first year for which the employee elected to be an objector, unless and until the employee notifies the International Secretary Treasurer in writing that she/he no longer desires to be an objector.
4. Expenditures in the following categories are among those chargeable to nonmember objectors.
 - a. Negotiation of agreements, practices and working conditions.
 - b. Administration of agreements, practices and working conditions, including grievance handling, all activities related to arbitration, and discussion with employees in the bargaining unit or employer representatives regarding working conditions, benefits and contract rights.
 - c. Conventions, Union business meetings, and other Union internal governance and related expenses.
 - d. Social activities.
 - e. Publications, to the extent related to chargeable activities.
 - f. Litigation before courts and administrative agencies related to contract administration, collective bargaining rights or other chargeable activities.
 - g. Legislative, executive branch and administrative agency activities on legislative or regulatory matters related to the negotiation or administration of contracts and working conditions.
 - h. Education and training of members, officers and staff intended to prepare the participants to better perform chargeable activities or otherwise related to chargeable activities.
 - i. Activities related to group cohesion and economic action of or by TWU represented employees, e.g., demonstrations, general strike activity, informational picketing.
 - j. Overhead and administration related to or reflective of TWU or TWU Local Union chargeable activities.
5. Expenditures in the following categories arguably are non-chargeable to nonmember objectors:
 - a. Community service and charitable contributions.
 - b. Affiliations with non-TWU organizations.
 - c. Support for political candidates.
 - d. Member-only benefits.
 - e. Lobbying to the extent not chargeable as per paragraph 4.g. above.
 - f. Publications, litigation and for overhead and administration to the extent related to arguably non-chargeable activities.
 - g. external recruitment of new members.
6. The TWU Policy on Agency Fee Objections shall be reprinted in each December issue of the EXPRESS. The International shall also send a copy of this Policy to each nonmember who objected during that calendar year to inform such person of the right to elect to again object in a succeeding year. Any Local Union that is required by law to have an agency fee policy, but which has failed to adopt such a policy, shall be deemed to have adopted this “Policy on Agency Fee Objections” as its own, and such Locals shall be identified in the December issue of the EXPRESS.
7. The International shall retain an independent auditor who shall submit an annual report verifying the breakdown of chargeable and arguably non-chargeable expenditures (the “Report”). Similarly, if a Local Union has determined to apply this Policy for its expenditures, the Local Union shall arrange for an independent audit of the breakdown of the Local’s chargeable and arguably non-chargeable expenditures. Any Local Union which fails in a given year to conduct an independent audit of expenditures shall be deemed to have spent the same percentage of its expenditures on chargeable activities as the International expended as reflected in the auditor’s

ICA POLICY ON AGENCY FEE OBJECTIONS

8. Report. The Report(s) of the independent auditor(s) for the International and, where applicable, the Locals shall be completed promptly after the end of the fiscal year. The most recent Report of the International's expenditures shall be reprinted in the December issue of the EXPRESS. The Local Union shall provide to the nonmembers it represents a copy of the Report of the breakdown of the Local Union's expenditures.
 - a. The fees paid by nonmember objectors shall be handled as follows:
 - b. Nonmember objectors who pay fees directly and not by checkoff shall pay an amount equal to the full amount of agency fees reduced by the percentage of agency fees ascribed by the audit Report(s) (described in paragraph 7 above) to arguably non-chargeable activities (the latter amount referred to hereafter as the "non-chargeable amount"). An amount equal to 50% of the non-chargeable amount shall be placed in an interest bearing escrow account.
 - c. With regard to nonmember objectors who pay agency fees by check-off, promptly following receipt of the checked-off fees, the non-chargeable amount, both for the International and the Local that is utilizing this Agency Fee Objection Policy, plus an additional 50% of that amount, shall be placed in an interest bearing escrow account. Promptly following each calendar quarter, the non-chargeable amount for the preceding calendar quarter, plus the interest accrued thereon, shall be paid to each such nonmember Objector.
 - d. The International shall bill each Local for the monies return to objectors from escrow in connection with the Local's arguably non-chargeable expenditures.
 - a. All such timely challenges shall be referred to an impartial arbitrator appointed by the American Arbitration Association ("AAA") under its rules for impartial determination of Union fees. TWU will request that the AAA appoint an arbitrator to promptly consider and make a determination regarding the challenges in a single consolidated hearing to take place in Washington, D.C.. TWU will provide the AAA with the names and addresses of the nonmember objectors who have filed timely challenges.
 - b. Challengers, the International and, if a participant, the Local Union(s) shall each bear its/their own costs related to the arbitration. The challengers shall have the option of paying a pro rata portion of the arbitrator's fees and expenses; if they decline that option, the Union parties to the proceeding will pay the full fees and expenses of the arbitrator and not just their pro rata portion of such fees and expenses.
 - c. Challengers may, at their expense, be represented by counsel or other representative of choice. Challengers need not appear at the hearing for their challenges to be considered. Challengers who elect not to appear at the hearing may file written statements with the arbitrator, provided they do so by no later than the beginning of the hearing before the arbitrator. Challengers who appear but elect not to present evidence or otherwise participate in the hearing may also submit written statements at or before the beginning of the hearing.
 - d. Fourteen (14) days prior to the start of the arbitration, challengers shall be provided with copies of all exhibits or a list of all such exhibits that a Union party then intends to introduce at the arbitration and a list of all witnesses the Union party then intends to call, except for exhibits and witnesses the Union party may introduce for rebuttal. If copies of exhibits have not otherwise been provided, a challenger may request that the Union forward a copy to the requesting challenger(s) during this 14-day pre-hearing period. Copies of all exhibits shall also be available for review by challengers at the hearing.
 - e. A court reporter shall make a transcript of all proceedings before the arbitrator. This transcript shall be the only official record of the proceedings and may be purchased by the challengers. The parties shall be informed when the transcript is available for purchase and/or review. If challengers do not purchase a copy of the transcript, a copy shall be available for purposes of inspection by them at the Union party's/parties' headquarters during normal business hours.
 - f. The arbitrator may determine all procedural matters affecting the arbitration consistent with the dual objectives of providing for an informed and an expeditious arbitration.
 - g. Each party to the arbitration shall have the right to file a post-hearing statement by no later than fifteen (15) days after the parties have been provided notice that the transcript has been completed and is available for purchase or review. Neither challengers nor Union parties may include or refer in the post-hearing statements to any evidence that was not previously introduced and accepted by the arbitrator during the arbitration proceeding.
 - h. The arbitrator, taking account of the record presented, shall issue a decision on the challenges to the validity of the auditor's Report of the "chargeable" percentage of Union expenditures. The arbitrator's decision shall be issued within forty-five (45) days after the final date for submission of post-hearing statements or within such other reasonable period as is consistent with the AAA rules and the requirements of law. The decision of the arbitrator shall be final and binding.
 - i. Upon receipt of the arbitrator's award, the escrowed funds, as referenced above, shall be distributed in accordance with the arbitrator's decision, with the remaining balance, if any, after any required payments to challengers, returned to the International's or Local Union's general funds.
9. A nonmember objector may challenge the last audited breakdown of chargeable and arguably non-chargeable expenditures contained in the independent accountants' Report(s) by filing a challenge with the International Secretary-Treasurer, together with notice to the employee's Local Union, postmarked no later than thirty (30) days after mailing of the December issue of the EXPRESS that includes the Report(s).
 - a. All such timely challenges shall be referred to an impartial arbitrator appointed by the American Arbitration Association ("AAA") under its rules for impartial determination of Union fees. TWU will request that the AAA appoint an arbitrator to promptly consider and make a determination regarding the challenges in a single consolidated hearing to take place in Washington, D.C.. TWU will provide the AAA with the names and addresses of the nonmember objectors who have filed timely challenges.
 - b. Challengers, the International and, if a participant, the Local Union(s) shall each bear its/their own costs related to the arbitration. The challengers shall have the option of paying a pro rata portion of the arbitrator's fees and expenses; if they decline that option, the Union parties to the proceeding will pay the full fees and expenses of the arbitrator and not just their pro rata portion of such fees and expenses.
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 - i. Upon receipt of the arbitrator's award, the escrowed funds, as referenced above, shall be distributed in accordance with the arbitrator's decision, with the remaining balance, if any, after any required payments to challengers, returned to the International's or Local Union's general funds.
10. The provisions of this Policy on Agency Fee Objections shall be considered legally separable. Should any provision or portion thereof be held contrary to law by a court or tribunal of competent jurisdiction, the remaining provisions or portions thereof shall continue to be legally effective and binding.

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It is critically important that every union member in the country contribute to their union's Committee on Political Education (COPE) funds. Dues cannot be used to support candidates for federal office, but the outcomes of those federal elections directly impact the power unions are able to exert, at bargaining tables and on shop floors across the nation. The best way to ensure that working people have the voice they need in Washington is to contribute to COPE! TWU Local 234