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Feds Must Crack Down On Driverless Vehicles

By International President John Samuelsen

It's about time.

California regulators finally slammed the brakes on General Motors' robot taxi, Cruise, in October, ordering the profit-mongering company to take its driverless scab cars off the road.

The order, which came after a Cruise vehicle dragged an already injured pedestrian down a San Francisco street, was the obvious and correct move. GM's four-wheeled robots have a history of troubling incidents, including a crash with a firetruck responding to an emergency in San Francisco in August. The car is everything The TWU International said it would be: a total menace.

This is hardly a cause for celebration, however, or a reason for us to lose focus. There are many other companies moving forward unfettered with driverless technology programs. GM itself could potentially resume operations in California after making software "fixes."

The TWU has undeniably been leading the fight to ensure that emerging technologies are safe and don't undermine transportation sector jobs. The most recent example of this was the forceful and comprehensive call to action that The TWU and 26 other labor organizations sent on Nov. 9 to U.S. Transportation Secretary Pete Buttigieg and the National Highway Traffic Safety Administration (NHTSA). In the letter, we urge the federal government to take three important steps:

- Launch a sweeping investigation of all autonomous vehicle operators, not just Cruise. Cruise clearly is a bad actor in this field. It concealed accident-related information from investigators. But it's not the only AV outfit that can't be trusted. The government needs to know what is really going on behind the scenes with the ongoing development and deployment of this technology – that insanely is being tested on streets that we all use.
- Mandate full transparency. NHTSA must require tech companies to provide a comprehensive package of data, not just on crashes, but on all incidents in which a vehicle's performance was less than optimal. It's nuts that very concerning incidents pop up on Twitter but are not fully reported to regulators by the companies, such as robotaxis encroaching into construction zones or halting for no reason for extended periods of time, causing traffic jams.
- Take control. The federal government must step in and impose centralized oversight and strict regulations—and demonstrate a firm commitment to both road safety and job creation, not decimation. There is an untenable Wild West aspect to the



"Corporate America is fully engaged in a greed-filled rush toward automation – despite the risks to public safety and the livelihoods of millions of workers."

current situation with a patchwork of state-by-state policies that are severely lacking. It's a recipe for continued disaster.

No doubt, we are facing a monumental challenge. Corporate America is fully engaged in a greed-filled rush towards automation—despite the risks to public safety and the livelihoods of millions of workers in the transportation sector. It's abundantly clear that Wall Street investment firms and corporate conglomerates only care about the billions of dollars in profits to be made if they can take workers, and their paychecks, out of the equation.

But The TWU is facing this challenge head-on. We were born and bred in the midst of a bloody fight in 1934. This TWU leadership knows it's always ultimately US against THEM: the workers against the employers.

Some employers are not as ugly as others, but when push comes to shove, they're always gonna choose profits and budget lines over decency and cooperation. From Main Street to Capitol Hill, working hand-in-hand with our Locals, we will continue to relentlessly battle, smartly and strategically, and never just for the sake of "fighting," on behalf of the 155,000 members of our union.

A handwritten signature in black ink that reads "John Samuelsen".



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Creating Pathways to the Middle Class

*By International Secretary-Treasurer
Jerome Lafragola*

From industry-leading contracts to the innovative ways we fight for our members, The TWU has always been known for punching above its weight. But there's another way this union regularly delivers for working people: by creating pathways to the middle class through workforce training and development opportunities.

For those from marginalized communities, including single parents and people who cannot afford college, the ability to receive employer-paid, hands-on training that leads to skills building and career advancement can mean the difference between living in poverty and achieving economic stability. Within the transportation industry, The TWU has long been a leader in this space, giving members already earning a union-negotiated wage the ability to advance their careers and earning potential, in part, by performing new skills required in a changing work environment.

We continue to blaze new trails while strategically positioning ourselves for the future. Here are just some examples.

After decades of stagnation, The TWU was the first union to secure an apprenticeship program at Amtrak. Launched at our Beach Grove, Indiana maintenance facility just over one year ago, the program has been so successful that Amtrak has expanded it to other crafts throughout its system. Today, 116 apprentices at six mechanical shops are receiving the hands-on training they need to advance in their careers.

Something similar is happening in Houston where Local 260 led the way in the creation of a state-of-the-art federally accredited apprenticeship program to train incoming mechanics on zero and low-emissions bus technologies. Funded with a \$2.2 million grant, the highly technical, in-depth program is free to new recruits, has a 90% completion rate, and is expected to train 20 new employees per year, up from just five under the training system previously in place at Houston Metro.

As transit agencies transition from gas-fueled fleets to clean energy electric buses, which require a different skillset to maintain, this kind of program is exactly the type of forward-thinking initiative needed to help transit agencies plan for the future, and ensure working people have access to good jobs.

And at American Airlines, TWU-negotiated contractual language provides a pathway for new hires, regardless of where they start in the company, to become certified Aircraft Maintenance Technicians.

While on-the-job training programs have always been important to the trade union movement, massive investments from the Bipartisan Infrastructure Law (BIL) and America's changing attitudes towards college education is placing a renewed emphasis on these opportunities. New polling shows that, for the first time in a generation, a majority of Americans do not believe college is



“For those from marginalized communities, including single parents and people who cannot afford college, employer-paid, hands-on training that leads to skills building and career advancement can mean the difference between living in poverty and achieving economic stability.”

worth the cost. There are nearly 3 million less students enrolled in four-year colleges and universities today than there were 10 years ago.

As Americans seek alternatives to the traditional four-year degree and as we begin seeing the fruits of the BIL, workforce training and development opportunities are going to become increasingly attractive options.

The TWU is fully prepared to provide these opportunities to new and current members, ensuring working-class Americans have sustainable pathways to the middle class and the skills they need as new technologies emerge.

A handwritten signature in black ink, appearing to read "Jerome Lafragola". The signature is fluid and cursive, written over a white background.



The TWU Shines at Star-Studded Rally

Striking actors held a major rally with undeniable star power outside Rockefeller Center in New York City in October – but The Transport Workers Union of America (TWU) stole the show.

More than 300 TWU members and officers from around the country came to support the Screen Actors Guild – American Federation of Television and Radio Artists (SAG-AFTRA) in its contract dispute with entertainment industry titans and conglomerates. Members from the Air, Rail and Transit Divisions filled two traffic lanes, and raised a mighty din that could be heard blocks away, as Deadline Hollywood, an online publication covering the entertainment industry, reported.

Deadline also reported TWU International President John Samuelson “really let fly” from the stage, railing against bosses in “a pugilistic speech that compared contract negotiations to fist fighting.”

Sure, stars like Jill Hennessy (Law and Order) and Megan Boone (The Black List) were on the stage. And Oscar-winning actor F. Murray Abraham (Amadeus, The Merchant of Venice) spoke passionately about the importance of unions demanding livable wages and affordable healthcare. The TWU, however, was in the house. In fact, the actor’s union asked that this be a joint rally, a nod to The TWU’s strength.

The TWU knows about fighting employers, Samuelson said from the podium after being introduced by TWU Local 100 President Richie Davis and Rebecca Damon, Executive Director of SAG-AFTRA East.

“This is how you win a fight: you keep throwing punches viciously,” Samuelson said. “Relentlessly. Endlessly. Until you land one that decks the boss. You wear the boss down with body shots, with head shots, until either they can’t take it anymore and they give up, or until you knock them unconscious. That’s how you win.”

The entertainment industry is different than the transportation sector, Samuelson acknowledged. But workers of all stripes have one unifying fact in common: we are not on the same side as the employers, executives, and managers.

“No matter the industry, it’s us against them,” Samuelson said. “It’s us against them. Always. It always will be. Don’t let anyone ever tell you different.”

The strike ended on Nov. 9 after the two sides reached a tentative agreement.

Use the QR code to watch President Samuelson’s full speech.



Transit Workers Who Participated in 9/11 Rescue, Recovery Efforts to Have Permanent Exhibit in Museum

Transit workers who participated in rescue and recovery efforts following the World Trade Center attack on 9/11 will finally get the recognition they deserve.

The National September 11 Museum in Lower Manhattan agreed earlier this year to include exhibits explaining how transit workers evacuated thousands from Lower Manhattan by bus and subway, searched for victims at Ground Zero, established emergency lighting and communications systems, operated heavy equipment to remove rubble, cleared area streets of destroyed vehicles, and transported police, firefighters, and medical personnel into the zone.

“Too many people don’t know that transit workers in fact comprised the dominant workforce in the first 48 hours,” TWU International President John Samuelsen said. “Official recognition in the National September 11 Museum will go a long way toward educating the public while honoring the service of our union brothers and sisters. It’s a long overdue development, but a welcome one.”

Former Local 100 President Tony Utano last year launched a campaign to correct the historical record with a high-profile media blitz that blasted the museum for its shortcomings. New leadership at the museum was more receptive to correcting the historical record than previous administrations.

Local 100 President Richard Davis and staff then finalized an agreement with museum executives. The museum has agreed to play for visitors a documentary with rare footage and interviews with transit workers, along with exhibiting artifacts, photos, and oral histories.

For the first time ever, Local 100 held its annual 9/11 commemoration and medal ceremony at the museum on Aug. 21. Transit workers will no longer be the “unsung heroes” of the rescue-and-recovery story, Davis said at the ceremony.

More than 125 transit workers and family members attended the emotional event. Eight transit workers were honored, including two who passed away from illnesses resulting from their service.

Jocelyn Lee accepted a medal on behalf of her deceased husband, Work Train Operator Eddie Lee.

“Unfortunately, we lost him in 2016, but when I got the call he was going to be honored, my heart was like he was alive again,” she said.

Medal recipient Hector Soto fought back tears as he remembered



“Everybody says there was a bucket brigade but there were no buckets there when I first got there. Everybody was going through the pile by hand.”

co-worker Lee, and said he appreciated that transit workers were finally being included in the museum.

“It’s nice to be recognized,” he said. “Thank God, the union made it happen.”

Both Samuelsen and Davis were among the more than 3,000 transit workers who responded to Ground Zero and Lower Manhattan either spontaneously or as part of a massive operation organized by NYC Transit. No other agency had the heavy equipment and workforce to quickly deploy to such an emergency as NYC Transit.

“Trackworkers, Structure Maintainers, Signal Maintainers, all over the city, when their midnight tours ended, all flocked down here, nobody told them to come,” Samuelsen says in the NYC Transit documentary, “Above and Below: NYC Transit Responds to 9/11.” “They were in the pile along with everybody else. Everybody says there was a bucket brigade but there were no buckets there when I first got there. Everybody was going through the pile by hand.”

Davis was among the Bus Operators who helped evacuate people fleeing Manhattan and then ran shuttles in and out of the zone for firefighters, medical personnel, and other rescue-and-recovery workers.



Organizing Victory in Baton Rouge

In September, The TWU was proud to welcome CATS on Demand workers in Baton Rouge, LA to America's Fighting Democratic Union. This organizing victory was possible because of a strong, empowered worker-led committee that remains laser-focused on securing that all-important first contract. This is another amazing victory for The TWU and transport workers as we continue to Organize the South!

Materials Handlers at Columbia University Join The TWU

When materials handlers at Columbia University realized they needed union representation, there was no question who they were going to turn to.

Since 1944, The TWU has had a strong presence at Columbia University. Representing maintenance, custodial, and security workers, The TWU's power at Columbia is seen and felt throughout the campus—and it made a strong impression with the materials handlers.

"This group of workers wanted to join The TWU because they saw the benefits that we have under our contract," said Alex Molina, President of Local 241, which represents workers at Columbia. "They've seen how we've dealt with management and how we were able to get reasonable contracts, even during the pandemic."

Tired of being disrespected, pushed around, faced with changing work rules and dangerous working conditions, materials handlers at Columbia University voted unanimously to join TWU Local 241 in September.

"I want to reassure these workers that they made the right choice joining The TWU. Their concerns are always a priority and, as long as we're here, we are going to fight to ensure they are treated equally and fairly," Molina said.



Correction: In the Fall 2023 issue of The Express, Merrill Cooper's birth year was incorrect. Merrill Cooper was born in 1921, not 1938.



Keeping the Federal Government Open is Essential To All TWU Members

Between October and November 2023, the federal government nearly shut down twice. While last-minute action was able to preserve government funding in both cases, the uncertainty this situation has created is undermining our economy and preventing necessary investments in worker safety, infrastructure, and any other vital programs. A government shutdown – even just the threat of one – would harm every TWU member.

TWU members work in every sector of transportation. Federal contractors, like NASA firefighters, risk losing their pay entirely during lapses in federal funding. Airline workers depend on a predictable and stable air traffic control system to do their jobs safely; a shutdown would abruptly end maintenance on these systems and training for the workers who run them. Every bus operator, mechanic, flight attendant, railroad car inspector, and other worker who needs federal clearance for medical, background (including SIDA badges), drug & alcohol, and other checks would see massive delays in processing times – potentially preventing them from working for a period of time while they wait on paperwork. There is no question: a shutdown would have an immediate and worsening effect on TWU members' livelihoods.

While we are strongly advocating in Washington, D.C. to keep our government open, we are also facing down dangerous appropriations bills from anti-worker Members of Congress. The House bill which would fund all of the federal government's transportation programs cuts Amtrak funding by 64%; eliminates \$2.2 billion from public transportation infrastructure; and, underfunds the Federal Aviation Administration by \$500 million. The House bill to fund the Department of Labor would take away \$100 million from the National Labor Relations Board and reduce funding for every workplace protection initiative. Neither of these pieces of legislation have been brought up for a vote yet due, in part, to intense lobbying from TWU; however, when the next government funding deadline approaches, we expect our opponents to renew their push of these disastrous bills.

Americans deserve predictable federal funding that builds good, union jobs and keeps our transportation systems safe. The next deadline for transportation funding is January 19, 2024, followed two weeks later by the deadline for labor funding on February 2. The TWU will continue to advocate not only to keep the government open, but to reject dangerous federal cuts that will undermine our economy and our jobs.



Prepping for a Comprehensive and Persuasive Lobbying Strategy

The New York - New Jersey State Conference is gearing up for Lobby Day 2024, where they will advocate for four bills that affect the rights and welfare of TWU members. These bills are:

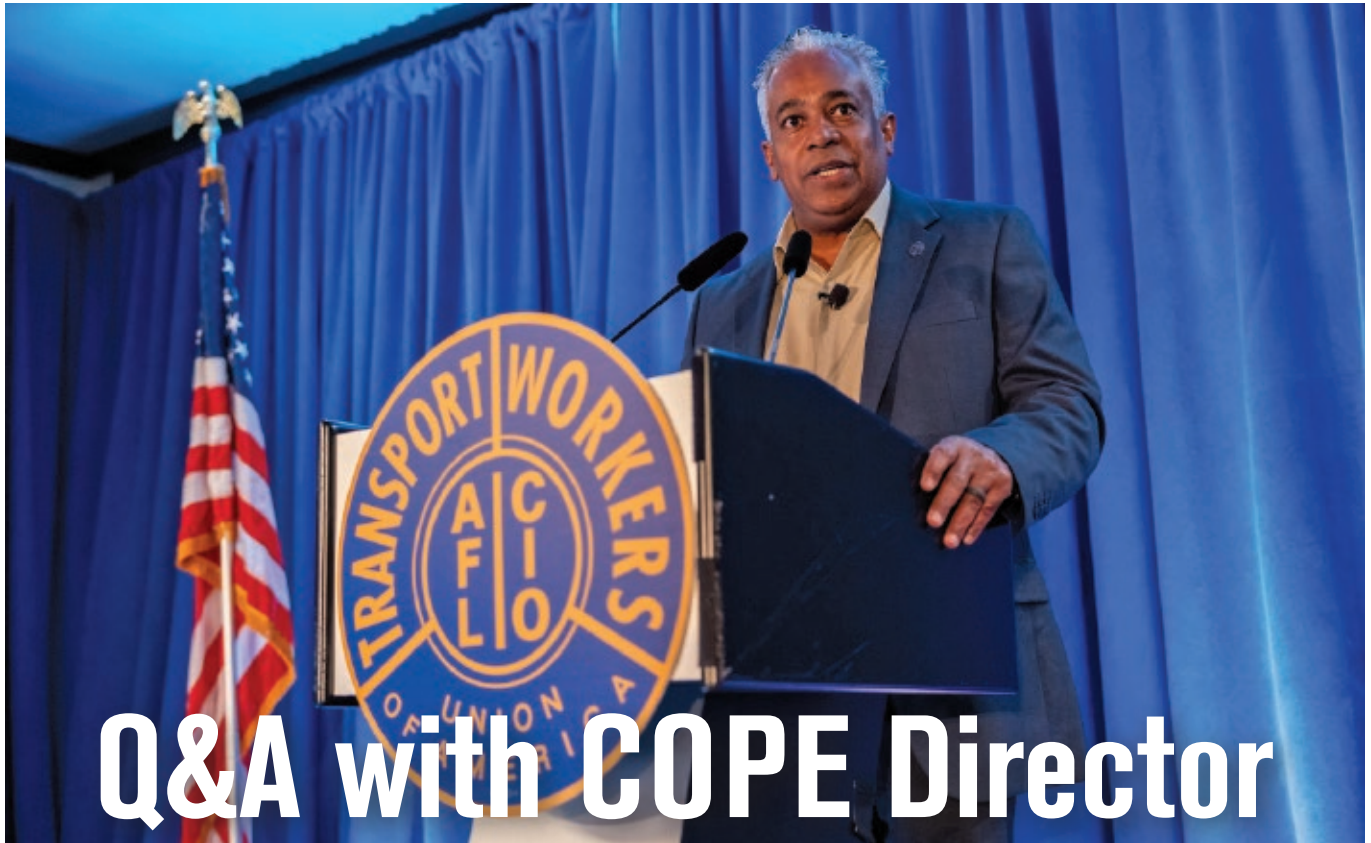
- The School Bus Personnel Due Process Protection Act
- The Transportation Carrier Employee Attendance Policies Act
- The Commuter Rail Employee Rights Protection Act
- The MTA Employees' "Death Gamble" Pension Reform Act



Uniting Communities: New York-New Jersey State Conference Joins Hands with Bronx Borough President for Holiday Extravaganza

In a remarkable collaboration, the New York-New Jersey State Conference and the Office of Bronx Borough President Vanessa L. Gibson are diligently preparing for the Holiday Extravaganza Children's event on December 6, 2023. Together, they will create a day filled with joy, education, and community spirit, showcasing the power of unity in making a positive impact.





Q&A with COPE Director Andrew Rangolan

Andrew Rangolan became TWU's Director of COPE State Conference in August of 2019.

Q. You have been a TWU member since 1998 and extremely active in your Local since 2000. Tell us about your career in the airline industry and with the union.

A. My journey has been one of unwavering commitment to the welfare of our members and the enduring belief in the power of unions to shape a better future for all workers. Today, I proudly serve as Vice President of TWU Local 570, but my career in the airline industry started in 1995.

Between 1998 and 2008, I was elected to and served as shop steward, a member of the negotiation committee, Base Chairman, and Recording Secretary of Local 570.

In 2008 I attended the inaugural meeting of the Florida State Conference. This event ignited my political activism within the state. I have since dedicated my efforts to projects aimed at empowering workers and solidifying our relationships with elected leaders.

Q. What is COPE, and why is it so important?

A. COPE, The Committee on Political Education, is the political action arm of The TWU. It aims to raise funds to support and endorse candidates for public office who share our vision and values. COPE evaluates candidates based on their record and programs, not their party affiliation.

As a political action committee, COPE carefully selects candidates who align with our goals and objectives. Our endorsements are based on rigorous assessments of candidates' achievements and proposals. We work in partnership with TWU State Conferences and Local representatives. We join forces in the screening and endorsement process, influencing policies and legislation at all levels of government. Our activities include various strategic approaches, such as attending AFL-CIO and Central Labor Council meetings, engaging with elected leaders, and interviewing candidates.

Q. You're known around TWU as a tech guy. Tell us more about your interest in technology and how you use technology in your role as COPE and State Conference Director.

A. The technology platform is a powerful tool to bridge gaps and amplify voices. My interest in technology stems from my older brother Gary, a computer engineer; he taught me so much about hardware and software. I continue to take classes today to be more efficient in various platforms, which allowed me to work with locals and State Conferences to share my knowledge. As COPE and SC Director, I leverage tech to engage with members, disseminate crucial information, and mobilize support for our causes. Whether through social media or email campaigns, various platform tools enable us to reach a broader audience and inspire collective action with our members.

Q. The TWU's first COPE conference was held in 1970. Since then, the program has grown and changed significantly. Tell us about your vision for the future of COPE.

A. Participating in The TWU Legislative COPE conference is an extraordinary experience for union members. It connects you with other union members who share your passion for critical issues and gives you the opportunity to influence those in power. The significance of this event is beautifully captured in the historic photo from the inaugural TWU COPE conference in 1970, where union members gathered on the steps of the Capitol, united in their cause.

COPE Conferences are not just events – they are transformative experiences that empower you to believe in your ability to effect change. They remind you that you are part of a formidable collective capable of shaping policies, championing rights, and leaving an enduring legacy of progress. So, revel in the pride of being a part of these conferences, and let that pride propel you toward a future where your union's impact knows no bounds.

Q. There are a lot of myths around how and where union dues are spent and how and where COPE funds are spent. Help us dispel some of these most common myths.

A. Misinformation often clouds our understanding of important matters. One area where this is true is the allocation of union dues and COPE funds.

Union dues are your contribution to the collective bargaining process and the safeguarding of your rights and benefits. These dues finance essential services such as legal representation, contract negotiations, handling grievances, education and training programs, member communication, etc.

COPE funds are voluntary contributions that support the union's political action and advocacy efforts. These funds are used for contributions to candidates, legislation that protects union members and their families, safety standards, overall labor rights, get-out-the-vote efforts, etc.

Q. They say all politics is local. Why, in your opinion, is political activism and engagement, especially among union members, so important?

A. The saying "all politics is local" emphasizes the significant impact of political decisions on individuals and communities at the grassroots level. Political activism and engagement, particularly among union members, is crucial for several reasons.

First, unions serve as collective voices for workers. By participating in political activities, union members can advocate for policies that protect workers' rights, job security, fair wages, and safe working conditions.

Second, political activism empowers union members to address social and economic inequalities. Unions historically played a pivotal role in advocating for issues such as civil rights and gender equality. By engaging in politics, union members can continue to fight against discrimination and injustice, promoting a more equitable society.

Third, political engagement allows union members to shape the future of their communities. By supporting candidates and policies



prioritizing education, healthcare, infrastructure, and other essential services, they contribute to the overall well-being of their local areas.

Moreover, political activism among union members strengthens democracy. Active participation fosters a vibrant democratic system by encouraging diverse voices and opinions. Unions provide a platform for workers to express their concerns collectively, leading to informed debates and policies that reflect the needs of the people.

Lastly, unions often engage in political activities to protect the rights of their members. They advocate for labor-friendly legislation and policies safeguarding workers from exploitation and unfair treatment. Political engagement is essential for the survival of unions and the preservation of workers' collective bargaining power.

Q. If TWU members want to get more involved in COPE or be more involved in politics at the local or state level, what should they do?

A. Getting involved is a powerful means to create change. Here's your comprehensive guide to navigating the world of political involvement, ensuring your voice is heard, and your actions make a difference:

- Connect with your Local Union State Conference Representatives
- Attend union meetings
- Educate yourself on specific issues and regional politics
- Join COPE through voluntary contributions
- Volunteer for campaigns to influence the success of worker-friendly candidates
- Engage with elected officials through town hall meetings, community events, or legislative sessions
- Encourage union sisters and brothers to register to vote.
- Lobby for policies that enhance workers' rights, including fair wages, workplace safety and job security;
- Consider running for office

By following these steps, you're becoming a driving force for positive change. Your active participation ensures the collective voice of TWU resonates strongly, fostering a political environment where workers' concerns are acknowledged and acted upon.

Local Union Officers ‘Seize the Moment’ at Joint President Council Meeting

Hundreds of local officers representing all three divisions of The TWU gathered in Atlanta from August 21-25 for the second annual Joint President Council Meeting. Hosted by Air Division Director Andre Sutton, Railroad Division Director John Feltz, and TUUS Division Director Willie Brown, the meeting brought together member leaders from across the union to network, celebrate victories, and find strategic ways to achieve shared goals.

A significant shared priority for TWU members and leaders is ensuring the voices of working people are heard as the accelerated

advancement and introduction of unproven, unregulated technologies permeates the economy. Calling AI and tech advances an existential threat, TWU International President John Samuelson drove home just how important collective bargaining and union activism will be now and in the future.

“In America and across the globe, working people are in a fight for their lives. It’s working people against the bosses, working people



Andre Sutton, Air Division Director



John Feltz, Rail Division Director



against job-killing robots and machines. There has never been a greater need for union activism than there is right now,” Samuelson told TWU member leaders. “Over the next ten years, if any worker can be replaced by robots, the bosses are going to do it. The only thing standing in the way of that is the trade union movement.”

Further expanding upon the challenges and opportunities presented by the influx of new and automated technologies was tech and labor expert Ed Wytkind, who gave an eye-opening educational presentation on the future of work.

Seizing the Moment

TWU member leaders cheered when they were greeted by Liz Shuler, President of the AFL-CIO, who spoke about their oversized role in the trade union movement today. Noting that more than 70% of Americans support unions and more than 75% support strike actions going on across the country, Shuler challenged TWU local officers to seize the moment and grow the trade union movement

by organizing the unorganized, focusing on the future of work, and rebuilding America on the terms set by labor unions.

“I see an urgent invitation for us as a movement to do what we are born to do, and that is to go big. If we’re going to go big as a movement, The TWU has to be part of the process to make this happen,” Shuler said. “This is our moment to use the leverage we have, take risks and be bold in our ambitions and how we bring people together.”

Following the joint session where member leaders from the Air, Transit, and Rail Divisions learned about and discussed common goals, local leaders were then divided by division for educational and strategic intensives that focused on issues important to them and their membership.

“It is important to understand that no matter what industry we work in, no matter what Division we’re a part of, we are all TWU. The one thing we have in common is obvious: We have to deal with all these rotten bosses,” Sutton said.



Willie Brown, TUUS Director



Liz Shuler, President, AFL-CIO



Ending the Scourge of Foreign Maintenance Offshoring

As airlines increasingly have planes fixed, overhauled, and maintained by lower-skilled workers in less-secure facilities across South America and Asia, The TWU is ramping up its efforts to end this dangerous, career-jeopardizing practice.

Flanked by TWU-represented Aircraft Maintenance Technicians, TWU International President John Samuelsen joined Reps. Nicole Malliotakis (R-NY), Anthony D’Esposito (R-NY), Nicholas LaLota (R-NY), and Marc Molinaro (R-NY) at New York’s JFK airport this October to urge passage of The Global Aircraft Maintenance Safety Improvement Act.

The bipartisan legislation would close troubling loopholes that currently allow foreign repair and maintenance facilities to operate without these requirements that facilities in the U.S. must comply with:

- Drug and alcohol testing for safety-sensitive personnel

- Background checks for workers at maintenance facilities
- Security threat assessments for foreign facilities
- Unannounced inspections for maintenance operations
- Minimum qualifications for aircraft mechanics

“It is absolutely insane that the U.S. government allows these companies — companies including American Airlines, Delta, JetBlue, United, Southwest — to pursue profit over the safety of the American people. This is a common-sense bipartisan issue. It’s where national security meets the national blue-collar jobs that working communities across the United States of America are built upon,” Samuelsen said.

The number of foreign repair and maintenance shops used by the U.S. airline industry has grown 36% in the last eight years. They are located in El Salvador, Thailand, Brazil, China, Costa Rica and other countries.



TWU Flight Attendants Tell Denver Travelers: Assault Won’t Fly

TWU flight attendants took to Denver International Airport in September to educate fellow airline workers and passengers on the Union’s nationwide campaign, Assault Won’t Fly, and the need to combat assaults on airline workers by unruly passengers.

At the action, TWU flight attendants handed out informational flyers and connected with travelers to discuss the importance of protecting airline workers. Following a massive spike of physical and verbal assaults on airline workers during the Covid-19 pandemic, The TWU has been at the forefront of advocating for protections for workers and stronger penalties for passengers who assault workers. While pandemic restrictions have eased, assaults on flight attendants persist. In 2023 alone, the FAA has received over 1,700 reports of unruly passengers, more than five reports a day.

“Nobody should have to go to work and worry about their own safety, especially when we’re there for the safety of our customers,” Thom McDaniel, TWU International VP and Southwest flight attendant, told ABC Denver.

Launched in June 2022, The TWU’s Assault Won’t Fly campaign centers around the experiences of airline workers who have been intimidated, harassed, or assaulted by abusive passengers and calls on legislators to stand with airline workers and pass the “Protection From Abusive Passengers Act”. The bipartisan legislation was reintroduced earlier this year by Senators Jack Reed (D-RI) and Dick Durbin (D-IL) and U.S. Representatives Eric Swalwell (D-CA) and Brian Fitzpatrick (R-PA).

The TWU Shows Cross-Union Solidarity

TWU members from across divisions and crafts came out in force this summer to support their sisters and brothers at American Airlines who are fighting for a fair contract. Local 568 1st Vice President joined International Transit Division Rep. Jeff Mitchell and members from their locals at a picket for American Airlines flight attendants, who are APFA members.



In Memory of Brother Scudder: TWU Local 513 Proudly Sponsors Golf Tournament

This year's Harold Scudder Golf Tournament was held on September 11, 2023. Participants included TWU members, officers, and friends from the Dallas/Fort Worth community. TWU Local 513 is a proud sponsor of this event, and has been for the last 23 years.

For over 30 years, Harold Scudder was a dedicated TWU member and a ramp crew chief for American Airlines. After Harold was diagnosed with brain cancer in 2001, his close friend and a retired member of TWU Local 513, Richard Pugh, fulfilled his simple request

to go golfing. But this was no ordinary round of golf. Richard invited fellow co-workers and people in the community to come out for a day of golf and fun. A round of golf, 144 golfers, and \$15,000 later, the Harold Scudder Golf Tournament was born.

Since its inception the golf tournament has raised over \$300,000 in the last 17 years, which is given to any DFW American Airlines employee who has been directly affected by cancer.

This year's tournament had well over 200 participants.



Tentative Contract Reached with Metro-North Railroad After Intense Battle

After an aggressive fightback campaign in New York and Connecticut, The Transport Workers Union in November secured a tentative contract for approximately 600 mechanics, cleaners, and cabinet makers at the Metro-North Railroad.

The 50-month agreement contains solid raises, big retro payments, and an unprecedented tool allowance for TWU members in two Locals: 2001 and 2055.

The agreement also is notable for what it doesn't contain. Metro-North, a division of the Metropolitan Transportation Authority, wanted the right to re-open the contract in the future if its finances take a turn for the worse – or for any other reason management deemed sufficient.

“We defeated that outrageous demand and secured real economic benefits for the membership,” Samuelsen said. “This was a long and difficult fight, but we prevailed.

It's a testament to what can be accomplished when the International and Locals work hand-in-hand toward the same goal.”

The contract runs from September 2019 through October 2023. It contains compounded raises of 9.84% and an unprecedented \$500 increase to the tool allowance, making it \$650 a year, payable every January. A Carman or Coach Cleaner hired on or before Sept. 1, 2019, will receive a retro-payment of about \$17,000.

In its entirety, the tentative agreement substantially exceeds union contracts at the Long Island Rail Road, another MTA commuter railroad.



The campaign ratcheted up several notches in July when Local 2001 President Patrick Howard and Local 2055 President Robert Cifarelli oversaw strike authorization votes by the

membership. The intensity then continued with a multifaceted strategy that involved: a media blitz with hard-hitting advertisements, targeted social media posts, and far-reaching coverage by television, print and radio outlets; a strong field game with officers and members leafleting commuters in both states about the potential of a walkout; and focused political outreach to educate key elected official about the issues and enlist their support.

As the Express was going toward print, Locals 2001 and 2055 were preparing for a ratification vote.





WE'RE NOT BACKING DOWN: Metro-North Worker Fights for Members

When Rich Houde, a Local 2055 member and Metro-North employee, was appointed shop steward earlier this year, he was ready to get more involved with his union. Houde never envisioned that would mean preparing to go on strike against the company—but he was all in.

“It’s clear there is a double standard between management and everyone else at Metro-North,” said Houde, who spoke to *The Express* before a tentative contract agreement was reached. “We put our lives on the line to work through the pandemic. How does Metro-North repay us? By lying to us and threatening to take our wages away.”

The situation Houde is describing started back in 2019 when the contract between TWU Local 2001 and 2055 and Metro-North expired. Instead of negotiating with his loyal and dedicated workers, MTA CEO Janno Lieber—who oversees Metro-North operations—crafted an outright lie which he sold to other unions on the property to defraud workers out of wages and benefits.

Rather than blindly accepting the terms of an unfair agreement, The TWU uncovered Lieber’s lie. The union exposed his fraudulent behavior to the governor of New York and the traveling public.

Houde was at the center of this activity, handing out fliers to passengers, attending shop gate meetings, and educating colleagues on the deceitful behavior of Metro-North leadership.

A Union Education

Houde sees the last six months as an eye-opening crash course in union activism and credits his local union president, Robert Cifarelli, as being a good mentor and fierce fighter.

Houde is especially pleased with the way The TWU has been aggressive and vocal in their resistance to Metro-North’s shady and fraudulent behavior. It’s a stark contrast to how other unions at Metro-North operate and one that is drawing attention across social media, in the news, and among rail workers.

“I’m learning that The TWU is a complex, sophisticated, and multi-layered operation laser-focused on protecting and supporting working people. Union members on the shop floor might not see it, but there is always someone working for you,” Houde said. “A lot of other unions on the property here just rolled over and accepted what the MTA and Metro-North offered. Our union is fighting for more because they know we deserve more – especially after the sacrifices we made.”

Like so many other workers deemed “essential,” Houde and his colleagues risked their own health and safety to work through the pandemic. Had it not been for their efforts, Metro-North could have collapsed, creating untold economic hardship for working families in New York and Connecticut. Knowing that Houde and his colleagues made major sacrifices to keep the railroad operational only makes their treatment by the MTA that much more appalling and intensified their convictions to strike.

“The people who work on the Metro-North trains are just trying to make a living so we can take care of our families,” Houde said. “For a long time, we didn’t want to rock the boat, but after the lying, deceitful behavior we have uncovered and the lack of disrespect, we feel we don’t have a choice. With support from the International, we are fighting for what we deserve, and we have no intention of backing down.”

Remembering Brother Bernard:

‘He made friends wherever he went’

Chauntann Reid, Local 234 Executive Board member, doesn’t want her union brother Bernard Gribbin being remembered as a victim of violence. Instead, she wants him to be remembered for his kindness and generosity. His outgoing personality. And all the ways he made lasting friendships wherever he went.

Gribbin, a bus operator in Philadelphia and a Local 234 member, was brutally murdered while on duty, shot multiple times by a passenger he was trying to serve. His murder is the latest in an ongoing epidemic of violence against transit workers—a nation-wide problem The TWU has long been fighting to change.

Gribbin’s outgoing personality, zest for life, and love of people makes what happened to him that much harder to accept.

“You don’t come across people as kind and nice as he was,” Reid said. “He was a good-hearted person. He made friends wherever he went. He was the type of person who enjoyed helping people. He was a veteran, and he saw operating a bus as just



another way of serving the people of his community.”

Gribbin was also a family man. Married to his childhood sweetheart, he often chose routes others would avoid just so he could get home early to be with his wife. Even on routes in tougher neighborhoods, Gribbin maintained his upbeat attitude and made it a point to get to know his regular passengers.

To honor his memory, support his family, and pay their last respects,



Local 234 hired chartered buses to take members to Gribbin’s wake. Reid said the experience of two families embracing each other—one by union, the other by blood—was a beautiful experience.

“Bernard’s family hugged everyone from the local and we exchanged stories and fond memories of him,” Reid said. “Bernard would want all of us to hold our heads up and keep moving forward.”

Local 234 is holding a fundraiser to help support Gribbin’s family. TWU members wanting to contribute can send donations to:

TWU Local 234 Union Hall
c/o Chauntann Reid
500 N. 2nd St
Philadelphia, PA 19123

Local 234 Contract Offers Historic Gains

The TWU is once again proving it is a powerhouse among American labor unions, punching above its weight to deliver for working people.

This November, members of Local 234 in Philadelphia overwhelmingly ratified a historic one-year contract that will bring a wage increase of 7% over the life of the agreement and a signing bonus — a first in the local’s history.

The contract contains several other historic, first-time

provisions, including retention bonuses, an increase in the disability pension benefit, and significant inroads into vehicle training for bus maintenance workers.

“This contract is very lucrative. It contains a lot of firsts, and it’s going to benefit our members,” said TWU Local 234 President Brian Pollitt. “Due to experienced negotiators and strong support from the International, we were able to come out on top and deliver for transit workers in Philadelphia.”

Women in Nontraditional Workplace Roles: Samantha Betancourt, Local 1400

From ticket agents who worked in the New York City Subway system in the 1930s to aircraft maintenance technicians, journeyman carmen, power cable maintainers, and more, The TWU has a long history of representing women who work in nontraditional workplace roles. In this issue of The Express, we are featuring Samantha Betancourt, a Tunnel and Bridge Agent (TBA) at the George Washington Bridge, and a member of Local 1400. Samantha has been a proud TWU member since 2018.



single little mistake you make will always be amplified, so you better have thick skin and make sure you learn your job or you're going to have a rough go of it. Luckily for me, the group that I work with has been great. I've had some really good mentors and people throughout my TBA career who have pushed me to be better; J. Mark, R. Scott, A. Pagano, G. Smithson, A. Halabi, C Wenzel, and J. Samaniego. So many more to mention but for me, it's been the people I work with that have made the "working in a man's world" challenge not so much of THE challenge for me... if that makes sense.

Q. What advice would you give to other working women?

A. My advice would be to work hard at whatever you want to do, take pride in your work, make sure you like what you do, be willing and able to pull your weight and don't just be another statistic.

Q. What does the Transport Workers Union mean to you and/or how has The TWU impacted your life?

A. For me, The TWU means the best security for my career, which I appreciate almost as much as my career itself. You always hear the phrase, "If you love what you do, you'll never work a day in your life," and that's exactly how I feel every day with this job and the protection and support from The TWU.

Q. Tell us about the job you perform and your responsibilities.

A. As a TBA, we are trained to respond to unique vehicular emergencies that occur in tunnels and on bridges throughout New York City. Our job is to make sure traffic keeps flowing and to save lives by providing medical care, fighting fires, extracting people from crashed vehicles, and even towing vehicles. Whether it's handling a disabled vehicle or clearing a major/minor accident, we are trained to handle the wide variety of emergencies that are thrown our way.

Q. What made you decide to go into this craft?

A. I've always hated paper-pushing jobs. It just was never for me. I'm someone who wants to be in the field, where the action is, helping other people. When one of my friends suggested I try EMS, I jumped in and I'm so glad I did. Throughout my career I've held positions on a volunteer basis and have also worked at a fire department. I've learned quickly that this is the field that I want to be a part of.

Q. What challenges have you faced as a working woman?

A. As a woman, you learn quickly that all eyes are on you. Every

All Aboard

Jeff Mitchell, International Representative with TWU's TUUS Division, rode Brightline, Florida's new high-speed rail system, with Secretary of Transportation Pete Buttigieg in October. Mitchell and Buttigieg spoke about the future of transportation and how to create good, union jobs in rail and transit industries.





Working Women's Committee Takes Tulsa

The TWU Working Women's Committee met in Tulsa, Oklahoma October 30 – November 2, where new chairs were elected by acclamation. LaTonya Benoit, Local 556; Giselle Martinez, Local 100; Denise Flemmings, Local 252; and Monesha Davis, Local 101 were elected as chairs; Audrey VanHook, Local 513, was appointed as the group's recording secretary. The event was hosted by TWU Local 514, including President Dale Danner, Vice President Marla Johnson, and The TWU Local 514 Working Women's Committee.

In addition to choosing new leaders, more than 60 proud TWU women engaged in a bold agenda that centered on workplace education and cultural appreciation. Highlights included a presentation by occupational therapists Laura Dill and Sonia Lopez who discussed the correct ways to move and stretch to prevent on-the-job injuries; an engaging conversation with

Alzheimer's research expert Peggy Killian who spoke about the disease's disproportionate impact on women; and a panel discussion with TWU female leaders about rising as women in male-dominated industries.

The event was capped off with an experience that told a true, and authentic story of Oklahoma, and gave The TWU Working Women's Committee a new perspective: Native American storytelling, history, food, and dance led by Mike Pahsetopah of the Osage – Yuchi – Cherokee - Creek Tribes and his wife, Lisa, of the Pawnee – Cherokee Tribes.

The next Working Women's Committee meeting will be hosted by Locals 555 and 556 and will be held in March in Atlanta.



Young Workers Learn the Value and Power of Internal Organizing

The TWU Future Leaders Organizing Committee (FLOC) took on the Big Apple from October 16-19, where young workers and future leaders engaged in an aggressive agenda designed to build their leadership skills and knowledge around union activities. The meeting was hosted by Local 100.

TWU Director of Organizing Angelo Cucuzza led FLOC members in an internal organizing training, where future leaders learned the differences between opened and closed shops and exchanged best practices for those unique scenarios.

The committee also received a Metro-North campaign update from one of their own, Local 2055 shop steward Rich Houde. You can learn more about Houde on page 17 of The Express.

Finally, COPE and State Conference Director Andrew Rangolan drove home the importance of participating in COPE and the benefits the program offers union members.

The next FLOC meeting will be March 25, 2024.



A N N O U N C I N G

THE TRANSPORT WORKERS UNION 2024 LEGISLATIVE & COPE CONFERENCE

The TWU International invites all local representatives to promote, advance, and defend our union's goals before decision makers in Washington, D.C. at the Legislative and COPE Conference May 12-15, 2024. 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 Hilton Washington D.C. Capitol Hill (525 New

Jersey Ave. NW, Washington, D.C. 20001) 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).

For now, please mark your calendars and make plans to come to D.C. in May.

SAVE THE DATE MAY 12-15, 2024

THE TWU LEGISLATIVE & COPE CONFERENCE

WASHINGTON HILTON, WASHINGTON, D.C.



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, 2023, 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.

Auditor's Responsibilities for the Audit of the Financial Statement

My objectives are to obtain reasonable assurance about whether the financial statement as a whole is free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes my opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, I: Exercise professional judgment and maintain professional skepticism throughout the audit. Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining on a test basis, evidence regarding the amounts and disclosures in the financial statements. Obtain an understanding of internal control relevant to the audit 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 Transport Workers Union of America's internal control. Accordingly, no such opinion is expressed. Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements. Conclude whether, in my judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about Transport Workers Union of America's ability to continue as a going concern for a reasonable period of time. I am required to communicate with those charged with governance regarding, among other matter, the planned timing of the audit, significant audit findings, and certain internal control related matters that I identified during the audit.

Opinion

In my opinion, the financial statement 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, 2023 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

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 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, 2023

	TOTAL	CHARGEABLE	NON-CHARGEABLE
Main office expenses	\$ 2,630,024	\$ 2,410,204	\$ 219,820
Servicing, negotiations and grievance expenses	5,213,656	5,213,656	-
Political expenses	992,535	-	992,535
Organizing expenses	737,106	-	737,106
Affiliation fees	1,282,866	-	1,282,866
TWU Express: Non-political information	378,750	378,750	-
Political information	107,450	-	107,450
Donations, tickets and advertisement	719,928	-	719,928
Salaries and related expenses	16,706,766	14,063,666	2,643,100
Convention expenses	18,764	18,764	-
Quill scholarship	81,200	-	81,200
Insurance	118,128	118,128	-
Investment expenses	317,423	317,423	-
Totals	\$ 29,304,596	\$ 22,520,591	\$ 6,784,005
Percentage to total	100.00	76.85	23.15

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

NOTES TO STATEMENT OF CALCULATION OF CHARGEABLE AND NON-CHARGEABLE EXPENSES AUGUST 31, 2023

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, 2023**

EXPENSES	TOTAL	CHARGEABLE	NON-CHARGEABLE
Rent and related expenses	\$ 770,633	\$ 670,660	\$ 99,973
Stationary and printing	116,222	104,724	11,498
Outside consultants	794,434	793,546	888
Telephone	135,738	117,393	18,345
Postage	24,035	21,559	2,476
Data processing expense	189,913	164,887	25,026
Equipment rental and maintenance	86,086	76,241	9,845
Subscriptions	122,555	105,904	16,651
Accounting	226,095	216,845	9,250
Depreciation	146,354	123,013	23,341
Miscellaneous expenses	17,959	15,432	2,527
Totals	\$ 2,630,024	\$ 2,410,204	\$ 219,820

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, 2023**

EXPENSES	TOTAL	CHARGEABLE	NON-CHARGEABLE
Negotiation expenses	\$ 902,012	\$ 902,012	\$ -
Legal fees	1,401,022	1,401,022	-
Transportation and facility costs	2,059,719	2,059,719	-
Reimbursement of Locals negotiating expenses	850,903	850,903	-
Totals	\$ 5,213,656	\$ 5,213,656	\$ -

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, 2023**

EXPENSES	TOTAL	CHARGEABLE	NON-CHARGEABLE
Salaries	\$ 6,815,976	\$ 5,728,940	\$ 1,087,036
Pension and welfare expenses	8,472,338	7,097,094	1,375,244
Payroll taxes	615,301	525,700	89,601
Auto expenses	771,148	685,034	86,114
Insurance, workers compensation	32,003	26,898	5,105
Totals	\$ 16,706,766	\$ 14,063,666	\$ 2,643,100

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

TRANSPORT WORKERS UNION OF AMERI

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 employees 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, administration and all other overhead 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

CA 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.
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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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