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# CELEBRATING LABOR DAY

*The*  
**Communicator**   
SEPTEMBER 2022 • VOLUME 40. NO. 6



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## THE COMMUNICATOR

Volume 40 No.7  
September 2022 (0745-6514)

The Official Publication of the New York State  
Public Employees Federation, AFL-CIO  
1168-70 Troy-Schenectady Rd., Latham, NY  
12110-1006

The Communicator is published monthly,  
except for January and August, for members  
of the New York State Public Employees  
Federation.

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# The President's Message By WAYNE SPENCE

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## Celebrating Labor in Advance of PEF's Annual Convention

I hope every PEF member had a relaxing and engaging Labor Day! It was great to see so many smiling faces at the Albany, Massena, Rochester and Syracuse parades. [We feature a write-up of the largest gathering](#), the Capital District Labor Parade, in this issue, as well as [dozens of photos](#) from the other celebrations across the State. I also want to point out this cool video we created from the Albany event. Those of you who were there probably noticed the guy with the funny helmet cam riding his hoverboard. [This is the kind of video you get when you do that sort of thing](#).

It is time now for PEF to focus on the 44th annual Convention, to be held Oct. 23-26 in Niagara Falls. Planning has been underway for months and I'm looking forward to another great gathering as we conduct the vital business of our union together. At this month's Executive Board meeting, members voted to hold the 2023 and 2024 Conventions in Syracuse. The board also approved PEF's political endorsements for the General Election in November. [We have complete coverage of the board meeting in this issue](#), as well as copies of the [two Constitutional Amendments](#) that will be considered at Convention, and [PEF's audited financial statements](#), as required by PEF policy this time of year.

We also have the second installment in our "What Can PEF Do For You?" series, featuring the hard-working men and women of [PEF Organizing](#). I spent a lot of time on the road with them these last few months during the Statewide Officers Tour, and I can truly say they work extremely hard to engage and thank members. Nothing we do is more important. If you ever have a chance to help them out at your worksite or in your region, please do.

Lastly, a pair of features to recommend in this issue: [First, meet marine biologist Christopher Scott](#), who works for the DEC on Long Island, helping educate New Yorkers about sharks! I know summer is almost officially behind us, but it's amazing to read about the work that goes into tracking shark activity and making sure the beaches are safe for human enjoyment while at the same time the water is a healthy environment for sharks.

Also, a shout-out to the winners of [this year's Joseph Scacalossi Scholarships](#). Since 1988, PEF has awarded hundreds of thousands of dollars to students in tribute to one of the union's founding fathers who worked at the state Department of Labor. Congratulations to this year's recipients.

Thanks for reading and I wish you all a safe and healthy start to the Fall.

In Unity,

A stylized, handwritten signature in blue ink that reads "Wayne Spence". The signature is fluid and cursive, with a long horizontal stroke at the end.

Wayne Spence  
PEF President

# Executive Board discusses Convention, improving the dental benefit, and efforts to increase membership

By KATE STICKLES



The PEF Executive Board met September 8 and 9 in Albany, observing a moment of silence for those lost on September 11, 2001; deciding on a Convention location for 2023 and 2024; discussing membership, financial and organizing updates; and approving political endorsements for the November general election.

## Silence for the fallen

Members of the board observed a moment of silence to remember the thousands of lives lost on September 11, 2001, including PEF members at the state Department of Tax and Finance New York City office who died in the attack.

"PEF lost the most civilian members out of any state union," PEF President Wayne Spence said. "Some of us know people who passed away on that day. Those people in Tax and Finance, they went to work thinking it was just a regular day – and they didn't come home. We never know what will happen on a given day."

Spence recalled how PEF parole members worked in DNA centers to help identify the deceased in the aftermath. PEF Executive Board Sergeant at Arms Darryl Stevenson was at the site as part of rescue teams and said it was the most horrific thing he has ever seen.

"It was devastating," he said. "I'm lucky I didn't get sick like a lot of people did."

Secretary-Treasurer Joe Donahue, who works for Tax and Finance, shared his memories of that day, including the story of a member not usually assigned to that office who was filling in for a coworker and was killed.

"We lost members of our family that day," he said. "Every year at this time we remember our fallen brothers and sisters."

The trauma didn't end when the rubble was cleared away.

"What do you say to the insurance companies? How do families move forward when there is no body?" said Spence. "PEF stepped up for members and their families. We pushed the governor, pushed to make sure families got needed relief. There was no GoFundMe back then, it was all grassroots."



## Membership and organizing update

President Spence said recent reports show CSEA membership on the decline, with many members jumping ship for better paying jobs in the private sector or ones that afford them full-time telecommuting options.

PEF's membership as of Sept. 7, 2022, stands at 48,472, an increase from a few months earlier. Spence attributed the success to recent organizing actions, such as the Statewide Officers Tour, where PEF signed up new dues-paying members. Interactions with members also led to follow-up action by union staff, including health and safety walkthroughs and in-person orientations.

"The tour feedback was very positive," reported Organizing Director Dan Carpenter. "Members were saying thank you for our work on COVID and the contract. They were very optimistic and loved hearing from the contract team."

Carpenter said the PEF booth at the New York State Fair was also a success.

"Region 4 Coordinator Gina Corona, the volunteers and the staff did an amazing job," he said. "We had just under 5,000 New York state residents sign Fund Our Future petitions." More than 1,100 PEF members and retirees also visited the booth and signed petitions.

Organizing teamed up with the communications team to create a prize wheel for the table they dubbed the "Wheel of Decline." When spun, the wheel landed on a pie slice with a question about state services, prompting a conversation about how New York has not done enough to maintain and grow the critical public services provided by PEF members.



"When the wheel landed on a question about how many group homes have been suspended or closed, people were surprised by the answer," he said. "Their jaws dropped, and many didn't believe it. It raised the level of awareness." (New York has suspended or closed 130 group homes serving people with developmental disabilities in the last two years.)

On the organizing agenda in the coming months, department staff plan to ramp up efforts to hold in-person orientations after two years of COVID pushing them online and making access difficult.

"We are identifying agencies and trying to tackle it," Carpenter said. "We are working to get into the trouble spots."



President Wayne Spence swears in new Executive Board members at the quarterly meeting on Sept. 8, 2022, in Albany. From left, Robert Doran, OMIG; Indermattie Balkaran, OMH Queens Children's Hospital; and Keith Browne, ENCON.

### Contract negotiations

PEF successfully negotiated an agreement requiring the state to put out a Request for Proposals (RFP) for the dental benefit contract.

"PEF will be meeting with the state and the Civil Service Department and other unions regarding the RFP later this month," President Spence said. "The state has not put the dental contract out to bid in more than two decades.

"Emblem provides dental coverage for PEF, NYSCOPA, Council 82, AFSCME, the State Police," he said. "PEF acquired valuable information from its own RFP, which we put out to explore the feasibility of bringing the dental benefit in-house. We have repeatedly found Emblem has some of the highest administration fees of all dental insurers. We see all these dentists walking away from the Emblem network because they lose money and can't afford to treat patients."

PEF has been at the forefront of the push to improve dental benefits and in collaboration with other unions, successfully advocated for the Office of the State Comptroller (OSC) to audit the dental contract.

"We have been the lead in bringing together other unions on this issue," said Contract Team Chair Darlene Williams. "I'm proud to be part of a union that is taking the lead in putting together improvements. Our fight has to be at the bargaining table. That's where we are going to make the change.

"The PEF Contract Team understands that the dental benefit is a priority and is prepared to address this issue in our upcoming negotiations," she said. (PEF's first contract meeting with the state is scheduled for November 2022.)

To submit comments and questions to the contract team, email [contract2022suggestions@pef.org](mailto:contract2022suggestions@pef.org). PEF will also soon distribute a survey to members to gather information on what is most important for the contract.

"We have to move strong and together," Williams said. "If we say, 'put on a Fund Our Future shirt,' put on a shirt so that everybody can see we are a united union. We need to show strength. I don't want the other side to think they are only negotiating with the team. I want them to realize they are negotiating with 48,000 members."

### Union finances

PEF Secretary-Treasurer Joe Donahue reported on the unaudited financial statements from April 1, 2022, to June 30, 2022, citing a volatile stock market resulting in a balance reduction of more than \$900,000, and some increased expenses.

"While some items are over budget, most even out over the course of the fiscal year," Donahue said. "No budget amendments are necessary at this time. We are in a good position, and we are strong financially, but with the fluidity of the stock market and ever-changing number of members, we need to continue to monitor investments, cash and expenditures."

For the quarter, direct services, including health and insurance claims, increased; staff travel increased due to the Statewide Officers Tour; and operating expenses went up due to temporary hires covering staff leaves.

Committees are mostly below budget, Donahue reported.

"Special Elections saw an increase because of the requirement we use Educational Vistas to verify our petitions," he said, "and are mandated by PEF policy to broadcast opportunities to run even if nobody is going to run for an office. I encourage everyone to reach out to people to get involved."

### Convention update

After reviewing locations, bids, and the pros and cons of each city's proposal, the Executive Board voted to hold the 2023 and 2024 PEF Conventions in Syracuse.

Syracuse's bid came in with a hotel block of 665 rooms, with an average room rate of \$148, and \$42,590 in incentives.

Bids were also received from Albany, Niagara Falls, and Rochester, Director of Special Events Kim Partridge reported. Buffalo declined to bid due to insufficient hotel space; Saratoga declined stating they had inadequate event space; and Lake Placid was out due to extensive renovations and lack of meeting space and rooms, she reported.

Syracuse hotels and event spaces have undergone transformations since PEF last held a convention in the city.

"I was pleasantly surprised when I went out there," Partridge said.

"The Marriott rehab is gorgeous, with a lot of meeting space."

An advantage to Syracuse, President Spence said, was the potential for union actions surrounding the proposed acquisition of Crouse Hospital by SUNY Upstate.

"I see an opportunity to go to Syracuse and galvanize with the community and other unions to show our opposition to the Crouse acquisition," he said. "It could be a huge problem for Syracuse residents and for people in health care in the surrounding area."



Nora Higgins receives certificate in recognition of 34 years of dedicated public service to the citizens of New York State.

### Knowing what constitutes strike action

PEF General Counsel Ed Greene discussed what constitutes an illegal strike under the New York State Taylor Law, which governs public sector unions, with an overview of a New York Supreme Court, Appellate Division, case involving the Buffalo Teachers Federation and the New York State Public Employment Relations Board (PERB).

A PERB administrative law judge ("ALJ") found that after a threat of violence at a Buffalo school and concerns management wasn't taking it seriously enough, school staff held a meeting where someone said they would be calling in sick the next day and suggested everyone else should do the same.

The ALJ further found that there were subsequently 16 calls into the substitute service and those staff members did not report to work the next day.

"Once management concluded that a concerted job action had taken place, management was obligated to submit a report," Greene said. PERB ultimately "determined that certain employees engaged in strike action and the local union didn't discourage the action."

Under the Taylor Law, it is important to remember that not only are unions prohibited from engaging in strikes, but they are also required to affirmatively discourage strikes among members.

"The ALJ concluded that the local and a field representative were aware and failed to take sufficient steps to discourage the strike," he said.

After the judge found that the staff participated in a strike action and the union failed to discourage it, the case was appealed to the Appellate Division of the Supreme Court, which confirmed PERB's finding against the staff and the local.

"As union leaders, it is important to understand and remember that the consequences are significant for both the individual and the union," Greene said. "For each day members are found to have engaged in strike activity, they can be required to forfeit two days of pay. We have represented members who did not know what constitutes a strike. It's important to communicate to members what does constitute a strike."

For unions, a decision against them can result in suspension of dues check-off, a significant injury to a union's ability to collect dues.

Union leaders should remember that a strike is not just refusing to work for one or more days, Greene explained. Any collective action by members to modify the usual procedures of an employer can potentially be considered a strike. A sickout, for example, or everyone arriving five minutes late to work, or "work to rule" (the employees essentially agreeing not to do extra work they might otherwise regularly do), can all be considered strike activity.

Greene and President Spence emphasized how vital it is for any union leader to report possible strike actions to PEF.

### Artificial intelligence and the AFL-CIO

The national AFL-CIO provided PEF with a \$50,000 grant to study artificial intelligence, specifically, the COMPAS software being used by the Department of Corrections and Community Supervision (DOCCS) in parole offices across the state.

COMPAS stands for Correctional Offender Management Profiling for Alternative Sanctions and it is used to predict the likelihood an offender will re-offend.

PEF parole officers report the program actually increases their work and other states have begun doing away with the program due to ineffectiveness.

"When we were approached by the AFL-CIO to do an AI study, we suggested COMPAS," Spence, a longtime parole officer, said. "It gives us an opportunity to talk about the algorithm and the dire importance of how we supervise, how we keep the community safe, and how it adversely impacts people of color."

The findings from the study will be submitted to the federal government, Spence said.

### Political action and legislative agendas

The Executive Board approved the political endorsement recommendations of the Statewide Political Action Committee (SWPAC). Members can find a list of endorsed candidates by clicking "PEF Political Endorsements – 2022" [on this page](#).

"Endorsements are a critical part of political action for this union," SWPAC Chair Randi DiAntonio said. "We review candidates' records to determine who to endorse and we openly support that candidate."

The General Election date for state and federal candidates is Nov. 8, 2022.



# PEF tells state to include its professional employees in planning future services

By **SHERRY HALBROOK**

PEF testified September 13 in Albany when the Assembly Committee on People with Disabilities held a public hearing on a draft strategic 5-year plan developed by the state Office for People with Developmental Disabilities.

PEF Vice President Randi DiAntonio, who was limited to just 3 minutes of verbal testimony along with other witnesses after the committee spent hours questioning OPWDD Commissioner Kerri Neifeld, said the agency missed an important opportunity by not inviting its own professional staff -- who are represented by PEF -- to participate in developing the plan.

As PEF said in the written testimony that it submitted, "Unfortunately, neither PEF nor its members were consulted or asked for comments on this plan during its development. This lack of collaboration resulted in a plan that completely failed to recognize or address the agency's short- and long-term challenges around attracting and retaining staff, or how the agency plans to continue to deliver quality services through the state-operated residences and other state-operated programs." PEF also highlighted the need for a thoughtful approach to attracting and retaining talent in order to re-open the hundreds of state-operated residences that have closed or "suspended services" over the past 18 months.

The Assembly committee, chaired by Thomas Abinanti of Westchester, divided the testimony into nine sections -- overview; workforce; barriers to services; availability of services; employment; quality of services; housing; self-direction opportunities for people with developmental disabilities; and miscellaneous other issues. PEF was assigned to a panel of witnesses addressing the availability of services.

DiAntonio, a licensed social worker at OPWDD for 25 years, said, "It saddens us to see what's happened to our system." Over a period of years, the state has greatly reduced its direct services to the public, its facilities and its workforce to provide those services. Contracting with private providers and shifting services to community-based programs as much as possible has not been able to meet the need and has put a great burden on individuals with developmental disabilities and their families. The state employed more than 29,000 people to serve these individuals in 1990, but that workforce had dropped to just 16,139 when the 2021-22 state fiscal year ended in March.

"In just the last year and a half, OPWDD has lost 2,300 staff," DiAntonio said.

She noted that many PEF members at OPWDD were deemed essential workers throughout the COVID pandemic and they risked



PEF VP Randi DiAntonio testifies on Sept. 13 before the Assembly Committee on People with Disabilities.

their lives and those of their families to maintain continuity of care and quality services for individuals with disabilities, many of whom have medical and physical issues that make them especially vulnerable to the COVID virus. The very low staffing and ever-mounting workload has had a crushing effect on the dedicated staff who remain.

"A lack of respect and communication is why people are leaving," DiAntonio said. "The state needs to respect and include its professional staff in discussing and developing plans and strategies. We need to be included."

The submitted plan focuses mostly on the role that private, not-for-profit providers played in the system. It barely mentions state-operated facilities and New York's plan regarding the lack of available services after all the suspensions, closings and consolidations. As a result, it leaves the families who rely on the social safety net provided by OPWDD wondering about the future of the system.

Nevertheless, PEF respects and appreciates the dire challenges that both the commissioner and Gov. Kathy Hochul inherited. "We thank them for what they have tried to accomplish in their first year and look forward to working with them to continue improving the critical services provided by OPWDD," DiAntonio said.

[Full written testimony here.](#)



# Hundreds march in annual Albany Labor Parade

By **SHERRY HALBROOK**

It was a warm day and evening as hundreds of PEF and other union members marched through the streets of downtown Albany on September 9 in the city's annual Labor Parade.

Colorful shirts, hats, pennants and whistles were worn and carried by marchers, along with signs. Some of the signs carried by PEF members said:

- We care for you when you need us most;
- COVID heroes deserve a fair contract;
- PEF: We Work for You;
- PEF: Respect us, Protect us, Pay us; and
- COVID responders deserve recognition.

It was, of course, a moment for PEF Region 8 to shine, with many of its members at the Albany County Probation Department joining PEF state workers in the parade. Workers didn't march alone, they were accompanied by their families, with many little ones in strollers as the older ones helped carry the union banners. Retired union members marched, too, with everyone sporting their union shirts and enjoying the lively spirit.

Albany Mayor Kathy Sheehan welcomed the marchers as the parade ended at the city's Corning Preserve along the Hudson River, where there was plenty of food for all of those who missed dinner to be in the parade.

State legislators and members of Congress are up for election and several incumbents representing the Capital District also were on hand to share their support for union members, shake hands, hear their comments and answer their questions. Congressman Paul Tonko, and state Assemblymembers Pat Fahy, Carrie Woerner and Phil Steck were there.

Labor leaders also spoke at the event including Mark Emanation, an activist musician and leader in the Hunger Action Network and Citizen Action, and retired carpenter Kevin Hooks, who gave a brief look at labor's historically important role in the Capital District.









# PEF Organizing is on the ground every day supporting and advocating for you

By KATE STICKLES

Did you visit the PEF booth at the New York State Fair? You weren't alone. More than 1,100 active members and retirees stopped by the booth from Aug. 24-Sept. 25 and signed about 5,000 petitions supporting the union's [Fund Our Future campaign](#).

The PEF Organizing Department was the driving force behind that booth and the constant advocacy on your behalf.

"Organizing is the backbone of the union," said Organizing Director Dan Carpenter. "It starts at the ground level. We support local and statewide union initiatives, such as PEF's Fund Our Future campaign, and we work closely with the Legislative Department and Communications Department on ways to inform our membership and gain outside support for our initiatives."

The department's staff of six comes from diverse backgrounds.

Dr. Christine Pluvoice, the new Assistant Director of Organizing, comes from a background of managed clinical care outcomes in marginalized communities vetted through public health policies and grassroots advocacy agenda.

"We can be your voice," she said of PEF. "We can be your engine for advocacy. Not everybody has the ability to easily express themselves, so we are that vehicle to help them put their needs into action and get results."

Hitting the ground running, Pluvoice joined PEF's statewide officers for a portion of their recent tour of PEF Regions across the state. She emphasized the importance of the union being visible and in the trenches with members.

"We educate, empower and mobilize," she said of the department.

Jessica Carpenter has been with PEF for nine years, five with organizing, and has traveled the state supporting member appreciation events and mobilization activities.

"Without organizing, the union has no strength," said Carpenter, who coordinates Organizing's efforts in PEF Regions 6-8. Organizing keeps members informed, reaches out and discusses issues, and advocates for the membership. "Member appreciation events are really designed to thank the members, especially when the state doesn't."

Andrew Puleo made the move from PEF member to PEF staff to continue his advocacy on behalf of PEF members in Regions 1-5.

"I've been involved with PEF since the first week I was hired by New York State Department of Transportation in 1999," he said. "I also joined COPE (the Committee on Political Education, a union fundraising vehicle for federal lobbying efforts) my first week on the

job and I was a member mobilizer within my first year as a PEF member."

As an organizer with PEF, Puleo provides new member orientations; recruits leaders, such as Stewards, Executive Board representatives, and Committee members; and promotes and encourages members to participate in Regional Committees, such as Political Action, Women's and Nursing.

"In the most basic sense, union organizing is an invitation to workers to be involved in their own lives," Puleo said. "Union organizers promote the reality that the collective voice of workers is a proven and effective way for workers to communicate their value and worth to employers. Union membership lifts the quality of life for members and communities."

Puleo encourages members to get involved by attending union meetings, joining a Division Committee, or running for an elected position.

After five years as a field representative for Region 12 on Long Island, Lisa Pinkard-Adams moved into an organizer role in Regions 10-12. With her background in government, community organizing and social work, Pinkard-Adams said organizing is all about building relationships.

"I tell leaders my definition of organizing lies within those two words," she said. "It's not all about numbers – it's about people. It can be anything from a one-on-one conversation to a multi-region electronic communication that reaches thousands at once. We identify leaders, we engage, we educate, and we work to push the union forward."

Pinkard-Adams said a lot of organizing work is done behind the scenes and requires collaboration between multiple PEF departments.

"The hard work takes place before an event ever happens and goes on after it's over," she said. "We set up meetings, iron out logistics, and coordinate schedules. Organizers are working with Field Services, Membership Benefits, Civil Service Research, elected leaders, the list goes on."

At a recent Steward training, she realized a majority of the leaders in the room didn't understand PEF's organizational chart.

"I decided to develop a simple handout that offers leaders, old and new, information on PEF's hierarchy," she said. "As organizers, we need to equip leaders so that they can equip the members."

Retiring after 34 years as a registered nurse at SUNY Stony Brook, Nora Higgins recently joined the Organizing Department as



the Nurse Coordinator. She most recently served as Region 12 Coordinator for the past eight years, as well as a clinical professor of nursing, and Steward, for 22 years. She chaired Region 12's Political Action Committee, and previously served as co-chair of the Statewide Nurses Committee.

Higgins plans to travel to each PEF Region to meet with nurses and gain insight into their needs and issues they face. "I hope my experiences, education, and strong motivation to get the right things done will prevail through my years of service," she said.

**Editor's Note:** This is the second in our continuing series "What Can PEF Do For You?" that will highlight the role PEF departments perform for the union membership. You can read the first installment about PEF Health & Safety, [here](#).







# PEF special elections filling mid-term vacancies on Executive Board, Reg. 12

By **SHERRY HALBROOK**

Four vacant seats on the PEF Executive Board have been filled and a fifth seat will be filled pending the results of a special election. These were all mid-term vacancies and PEF members filling them will serve the remainder of the unexpired terms that end July 31, 2024.

Keith Browne fills Seat 105 that represents certain members at the state Department of Environmental Conservation. Robert Doran fills Seat 202 that represents members at the state Office of the Medicaid Inspector General. Indermattie Balkaran fills Seat 375 that represents certain members at the state Office of Mental Health. And Kyle Jacobson fills Seat 485 representing certain members at the state Department of Taxation and Finance. All four of these candidates were automatically seated because they were the only certified candidates for those positions during the Third Quarter Special Elections.

Two candidates were certified for Seat 245 representing certain members at the state Labor Department and an election was held between Kevin Jones and Michael Marquez. The American Arbitration Association will count ballots in that election September 16.

No candidates were certified for 12 additional vacant board seats and nominees will again be sought for them in the Fourth Quarter Special Election, along with any new board vacancies and the now vacant post of PEF Region 12 coordinator. Region 12 includes both Nassau and Suffolk Counties on Long Island.

PEF President Wayne Spence urged PEF members who are eligible to run for the vacant seats to give it serious consideration. "We are always stronger together. We need voices representing every part of our membership debating our issues, and voting on our actions

and policies. Vacant board seats mean that all of those members represented by that seat are going without their rightful chance to participate fully in setting our goals and acting on them. That's unfair to them and we all suffer for it. So, please, consider stepping forward and run to fill a vacant seat."

Nominating petitions for the Fourth Quarter elections will become available October 11 at [www.PEF.org/Elections](http://www.PEF.org/Elections) and must be returned to and received by the Special Elections Committee by 5 p.m. November 2. If more than one candidate is certified by the committee for any vacant seat, ballots will be sent to that constituency November 23 and must be returned to AAA by December 15 for counting the next day.

At this time, the following vacancies will be subject to the Fourth Quarter election process:

Region 12 Coordinator;  
Seat 1, Agriculture and Markets;  
Seat 15, Civil Service;  
Seat 40, Corrections and Community Supervision;  
Seat 90, Higher Education Services Corporation;  
Seat 101, SUNY Stonybrook;  
Seat 104, SUNY Stonybrook;  
Seat 172, Information Technology;  
Seat 173, Information Technology;  
Seat 220, Workers' Compensation  
Seat 395, Office for People with Developmental Disabilities;  
Seat 425, Public Service;  
Seat 520, Transportation; and  
Seat 545, Political subdivisions of NYS.



# Congratulations to this year's Joseph Scalossi Scholarship recipients

By KATE STICKLES

Paying for college amid record-high inflation got even harder as of July 1, 2022, when interest rates for federal student loans rose from 3.73 percent to 4.99 percent for subsidized and unsubsidized undergraduate loans, and from 5.28 percent to 6.54 percent for unsubsidized graduate loans, according to Forbes.

"Each May, Congress sets federal student loan interest rates for the academic year based on an auction of 10-Year Treasury notes. As the Federal Reserve has raised interest rates to control inflation, consumer debt has become more expensive," the Forbes article said.

PEF is dedicated to helping members and their families achieve their higher education goals.

Since 1988, PEF's Joseph Scalossi Scholarship has helped children, stepchildren or wards of active, retired or deceased PEF members pay for higher education. As a tribute to a state Department of Labor member who helped form PEF and fought for the rights of his members in Manhattan, every year PEF awards 10 students \$1,000 annually for four years.

PEF received 232 preliminary applications and received 151 final applications back. This year's Scholarship Committee included Sheila Ambrose, chairperson; Andrew Youngs, Maddie Shannon-Roberts, and Wanda Bates, members; and Joanne M. Wright, PEF support staff.

The recipients were Muhammad Ali, Zaid Ashar, Gabriella Baratier, Syvonne Forgette, Madeline Harris, Gloria Lee, Christina Oberting, Ethan Schoenblum, Alexander Swartz, and Lindsay Segal.

Below are bios of some of the students:

## Zaid Ashar



Zaid Ashar, the son of Tabassum Insaf, graduated from Shaker High School in June 2022 as a National Merit Scholarship Commended student. Zaid has also been awarded the National Biology Teachers Association award for his research into racial disparities in bariatric surgery. As a student, Zaid was the president of the Shaker Model United Nations as well as a member of the Shaker FIRST Robotics Team and the Shaker Muslim Students' Association.

Outside of school, Zaid serves as

a fireman at Verdoy Fire Department. He has also volunteered as a tutor at the Unity House, a homeless shelter in downtown Troy, as well as teaching Raspberry Pi and other STEM summer camps

at Siena College. He regularly volunteers at the youth programs for AlArqam Center of Saratoga. In the fall, Zaid will be attending Union College through their Leadership in Medicine program, where he has been guaranteed entrance to Albany Medical College upon completion of his four years at Union, incumbent upon his GPA. In his free time Zaid enjoys traveling, soccer and kickboxing.

## Gabriella Baratier

Gabriella Baratier, the daughter of Marianne Baratier, graduated



from Guilderland High School as a 4.0 student and a member of the Class of 2021. She was the recipient of the Daryl Farley Scholarship and the SEFCU Smart Sense Scholarship, and she was inducted into the National Honor Society. During high school, Gabriella was involved in Key Club, Sources of Strength, the Guilderland Anti-Racism Committee, the Altamont Food Pantry, and the Altamont Reformed Church Youth Group. Gabriella was a captain on the

Guilderland track and field team, and during her senior season she received the Coaches Award.

She is a member of the Class of 2025 at Union College in Schenectady, N.Y. At Union, she is a 4.0 student, a member of the Scholars Program, and a recipient of the Presidential Scholarship. She is majoring in history and double minoring in political science and English. She is employed as a tutor in the Union College Writing Center, and she is involved in the clubs Women's Union, A More Equitable Union, and Pride Club. Gabriella is passionate about public history, Louisa May Alcott, and hiking.

## Syvonne Forgette



Syvonne Forgette, the daughter of Efrat Forgette, graduated with an IB diploma from City of Buffalo - City Honors High School. She was the founder, president, and advisor of the Environmental Club; co-captain of varsity crew; and lead bassist in the orchestra. In the greater Buffalo community, Syvonne volunteered as a Buffalo Ski Center downhill race coach and as a bassist in the Buffalo Bluegrass Youth

Ensemble. She received the Gold Star Award from the Girl Scouts of America. Syvonne was also an active teen in Jewish Buffalo. She was a presenter in the Student-to-Student Program, a graduate of the Buffalo Jewish Teen Leadership Fellowship, is a counselor at Camp Seneca Lake and has helped plan many teen initiative events. Syvonne was recently named a Community All Star Student by Buffalo Business First. Syvonne will attend Tufts University in the fall to study biomedical engineering.

#### Madeline Harris



Madeline Harris, the daughter of Thomas Gaudet, was the valedictorian of her class at Oneida High School. During high school, she was president of the National Honor Society, Zonta Club, and Teens for a Better World Club. She was also a member of Student Council, Youth Court, Science Olympiad, and Environmental Club. During her senior year, Madeline was a student in the New Visions Allied Health Partnership, where she spent a majority of her mornings shadowing medical

professionals at Oneida Health Hospital. Madeline was a member of the high school Chamber Choir and a player on the state-ranked Oneida Girls Varsity tennis team. She completed more than 60 hours of community service through efforts in the National Honor Society, Z-Club, and Oneida City Youth Court, including helping at various community events and mentoring a student at a local elementary school. She enjoys working as a waitress in Sylvan Beach and playing tennis with friends. Madeline plans to study biomedical engineering on a pre-medical track at Boston University in the fall.

#### Gloria Lee



Gloria Lee, the daughter of Stella Lee, is an undergraduate at the University of Connecticut where she is majoring in actuarial science and minoring in computer science. She is currently a summer intern at New York Presbyterian Hospital in the Information Technology department. Gloria graduated from Stuyvesant High School in 2022. In high school, Gloria participated in ARISTA, Stuyvesant's Honor Society, and was a senior editor for the Stuyvesant Writing Center. Gloria also volunteered at P.S./I.S.

266 as an arts and crafts teacher for two years as well as at the Latimer Gardens Senior Center where she worked as a community outreach coordinator volunteer. Gloria previously worked as a teacher assistant for the Summer Rising program for the Coalition for Hispanic Family Services, where she gained teaching experience in helping non-native English speakers gain proficiency in writing and math. Gloria is well versed in Spanish and Chinese. Gloria has won the New York Scholarship for Academic Excellence, was a National Merit Scholarship Finalist, won an AP Scholar with Distinction award, and was a National Spanish Exam Gold Medalist. She was the founder and

president of the Stuyvesant Papercrafts club for three consecutive years. In her free time, Gloria enjoys playing piano, which she has played for ten years, and swimming.

#### Christina Oberting



Christina Oberting, the daughter of John Oberting, will be entering her sophomore year of college at Colgate University this fall, where she is a neuroscience major on a pre-health track studying to become a neurology physician assistant after graduation. Throughout high school, she was involved in several organizations around the school and outside community, some of which include serving as the Vice President of the National Honor Society, a member of the varsity cheer team

and ski club, working two waitress jobs at local establishments, volunteering at the Regional Food Bank and The Eddy Village Green, and serving as a peer tutor. During her first year at college, she has been involved in similar activities, including tutoring high school students at Hamilton Central School, running afterschool activities for elementary students with peers through the Hamilton Outdoor Group, and working with Colgate Hunger Outreach. This upcoming year she hopes to involve herself more in the school and local community, and will also be working as a community leader for the Office of Residential Life.

#### Ethan Schoenblum



Ethan Schoenblum, the son of Paul Schoenblum, attended Bethlehem Central High School where he graduated on the honor roll and a member of both the Gladys E. Newell chapter of the National Honor Society and Spanish Honor Society. As vice president of the Masterminds Club and an active participant in many other clubs, sports, and student activities, Ethan connected with as many individuals as he could, as well as the community as a whole. He participated in the Bethlehem

Youth Court, volunteered at the local Ronald McDonald House and soup kitchen, and worked as a teen aide for Jewish second graders at the Einhorn Center for Jewish Education. He also excelled in his studies, receiving the Harold Reissig Award for Mathematics and being commended in the National Merit Program. Ethan will be attending Binghamton University to study engineering and plans to work on a solution to a source of clean, sustainable energy. He enjoys weightlifting, playing the guitar and meeting new people.



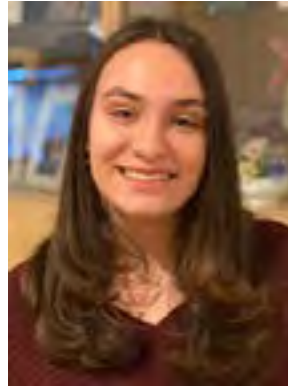
### Alexander Schwartz



Alexander Schwartz, the son of Andrew Schwartz, attended East Meadow High School where he was in the National Honor Society, Academy of Finance, Business Honor Society, Math Honor Society, Science Honor Society, Social Studies Honor Society, English Honor Society, Band/Marching Band, Battle of the Classes, Key Club, and Stem Club. He made Honor Roll every quarter of high school. Alex was on the cross-country team for three years, spring track team for three years, winter

track for a year, and wrestling team for three years. He also played travel baseball for his first two years of high school and played flag football for all four years. Alex also worked as a baseball/softball umpire for all four years of high school and worked as a referee for SMAA Flag Football League. Alex has been in Cub Scouts and Boy Scouts since first grade. He is currently a Life Scout and is pursuing his Eagle Scout Rank. In 11th grade, during the start of COVID, he volunteered for 60+ hours in the ICU at Nassau University Medical Center. Also in 11th grade, Alex helped raise and train a future guide dog for the Guide Dog Foundation. For the fall semester, Alex will be attending Nassau Community College. In his free time, Alex enjoys going to the gym, wrestling, and hanging out with friends. He also enjoys watching baseball and football.

### Lindsay Segal



Lindsay Segal graduated from East Meadow High School in 2021 and currently attends Binghamton University. She is majoring in math and minoring in education/computer science. Lindsay was a member of winter and spring track throughout high school and competed at State Championships her junior year. Lindsay was also a member of the National Honor Society, Math Honor Society, Science Honor Society and Social Studies Honor Society in high school. She has volunteered

at Birthday Wishes of Long Island and the Bellmore-Merrick Community Cupboard. Lindsay also won an East Meadow Scholar Athlete Scholarship and the Long Island Teachers Benevolent Fund Len Motisi Scholarship. In her free time, Lindsay enjoys running, knitting, crocheting, traveling, and spending time with her friends, family, and twin sister.

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# Amid rising costs, college scholarships are more valuable than ever

By KATE STICKLES

Over the last two decades, the cost of tuition and fees at private national universities has jumped 144 percent; out-of-state tuition and fees at public universities has risen 171 percent; and in-state tuition and fees at public universities has grown 211 percent, according to [U.S. News and World Report data](#).

"The pandemic has shaped how college-bound high school students view higher education, with four-in-ten rating cost as 'most important' when asked specifically about it in choosing where and how to pursue their education," according to [Fidelity Investment's 2021 College Savings & Student Debt Study](#). "Nearly half (49%) of high school parents expect grants and scholarships to play a role in financing education, but only one-third of recent graduates say they benefited from these programs."

And while the Biden administration aims to forgive federal loan debt for some, affordability of college continues to be an issue for high school students thinking about higher education. That's where union membership can be a vital resource.

PEF membership expands scholarship opportunities, both through PEF itself as well as through parent unions and affiliations.





PEF awards annual scholarships of \$1,000 for four years to 10 students through the Joseph Scacalossi Scholarship program, open to children, stepchildren, or wards of active, retired or deceased PEF members.

The program is open to high school seniors and college freshmen and applications are due annually in March.

View this year's recipients [here](#).

Various PEF Regions and Divisions also offer scholarships. Check with your council leader or regional coordinator for opportunities.

This year, PEF Division 247 (DOT) is offering five \$400 scholarships. Candidates must be a full-time student and either an unmarried child, spouse, or dependent of a Division member. Member must be active in Division 247 for at least one year. The application deadline is Sept. 22, 2022. Click [here](#) for the form.



Through PEF's parent unions, the American Federation of Teachers (AFT) and Services Employees International Union (SEIU), members and eligible dependents may also be eligible for Union Plus scholarships ranging from \$500 to \$4,000.

Since 1991, Union Plus has awarded more than \$5.2 million to more than 3,600 families.

Applications can be found [here](#) and are due by Jan. 31, 2023.

Emily Wenke, the daughter of PEF member Joanne Wenke, received a \$550 [Union Plus scholarship this year](#).



[Visit PEF's scholarships page](#) for up-to-date information and links on a number of scholarships available through SEIU, including lottery scholarships, the Bonnie Ladin Scholarship, the Jesse Jackson Scholarship and the Moe Foner Scholarship.





# PEF marine biologist educates the public, first responders on shark interactions and how to respond when bites occur

By KATE STICKLES

Sharks already get a bad rap, but with all the recent news of an [uptick in shark sightings](#) along Long Island beaches, the East Coast, and around the world, many people are growing wary of entering the water.

It might seem more dangerous given the media attention, but according to shark experts, negative shark interactions are still uncommon and increased shark activity is actually a good sign of a thriving ocean.

"Sharks are meant to be there," said PEF member Christopher Scott, a marine biologist with the Department of Environmental Conservation's Division of Marine Resources. "It's a positive sign these animals are here, without them, the oceans would be less healthy. It's important to the ecosystem and should be celebrated."

According to the Atlantic States Marine Fisheries Commission's (ASMFC) Coastal Shark Management Board, "Sharks are a [vital part](#) of ocean ecosystems all over the world. Scientists consider them to be a keystone species because they generally reside at the top of the food chain having a strong impact on other species either directly or indirectly. Removing or reducing shark populations in an area can cause an imbalance in the food chain and produce far reaching negative impacts.

## Dealing with shark-human interactions

In his role at the DEC, Scott works closely with state parks staff, law enforcement and first responders to address incidents across Long Island beaches, advising them on how to prepare for and respond to shark activity and sightings.

"When there is an incident, we reach out to first responders and ask them specific questions about the environment -- what bait is around, what were swimmers doing," Scott said. "We use this information to determine the species and to inform public safety."

If you are taking a trip to the shore, Scott said it is always best to err on the side of caution and be aware of your surroundings.

"Anyone entering a natural environment needs to respect that environment," he said. "Humans assume the risk and there is always a chance of interacting with something. The best tool is to change your behavior and avoid certain things."

"A lot of shark bites are due to misidentification by sharks," he said. "They feed on small fish, so to minimize misidentification, don't go where there are schools of bait fish and avoid areas with a lot of seal activity. Don't go out during dusk or at night because those are times when sharks feed. Don't go in murky water."

### Increasing shark awareness on the job

At the Division of Marine Resources, DEC staff dedicate much of their time to various interstate fisheries management plans, including for coastal sharks. Coastwide management of sharks in state waters is regulated by the ASMFC Coastal Shark Management Board.

"When the board makes recommendations, states have to create and implement regulations in accordance," Scott said. "For example, when the population of shortfin mako took a nosedive, we had to implement regulations to shut down fisheries."

Each year during Discover Channel's "Shark Week," DEC staff run a social media campaign to counter the stereotype that sharks are the stuff of nightmares and educate the public on these often-misunderstood creatures.

Throughout the year, staff also respond to reports of [deceased sharks](#) as part of the Shark Salvage Program, where dead sharks are retrieved to record information such as species, sex, and length, and document the carcass with pictures and its stranding location coordinates. The salvage program affords scientists the opportunity to retrieve samples and advance research on sharks.

"We work with shark researchers to secure the animals and perform a necropsy," he said. "We look for signs of why the animal died and can take tissue samples that you can only get with a deceased shark. This is a great way to advance shark science locally."

Some of the department's research is facilitated by the public.

"We have the Shark Spotter program where the public can submit observations of sharks in the wild," Scott said. "The information helps biologists record the presence of sharks and helps further the understanding of local shark ecology and behavior."

You can take part in the program by submitting sightings [here](#). You can also view sightings reported by others [here](#).

For Scott, a lifetime passion for large marine life led him to the DEC.



"I've always had a passion for large fish like tuna and sharks," he said. "Our unit, Marine Fisheries, handles everything from crabs and lobsters to sturgeon and sharks. A wide swath of things come our way."

To learn more about sharks, visit the DEC's shark webpage [here](#).

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## Labor in the News

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### Support for labor unions highest since 1965: Gallup

American support of labor unions rose 3 percent over the last year, from 69 percent to 71.

Increased support is attributed to union drives at major companies across the country. A Starbucks in Buffalo became the company's first union location in December 2021, with more than 200 stores holding successful votes since. In April, a warehouse in New York City became the first unionized Amazon location.

"The new poll found that 6 percent of U.S. adults report that they are a union member, and 16 percent live in a household in which at least one resident is part of a union," an article on the Gallup poll stated.

Read more [here](#) and [here](#).

### Railroad unions reach tentative deal with 24% pay raises

There are 12 unions in negotiations with the country's largest freight railroads and three have reached a tentative deal that would deliver 24 percent pay raises and avoid large-scale strike action.

The tentative five-year deal covers more than 15,000 members of the International Association of Machinists, the Transportation Communications Union and the Brotherhood of Railway Carmen unions.

"The railroads have until mid-September to reach agreements with all their unions before federal law would allow them to go on strike. If it gets to that point, however, Congress is expected to step in to keep the trains moving because a rail strike could be devastating to the economy. Lawmakers could impose terms on both sides or order arbitration," according to news reports.

Read more [here](#) and [here](#).

### Labor board rules Tesla must let workers wear union clothing

Tesla factory workers scored a win Aug. 29 when the National Labor Relations Board reversed a decision that barred employees from wearing clothing with union insignia while on the job.

In a 3-2 decision, the court ordered Tesla to "stop enforcing an 'overly broad' uniform policy that effectively stops production workers at Tesla's Fremont, California, factory from wearing black shirts with the United Auto Workers logo."

Read more [here](#) and [here](#).

### Red-hot labor market helping union organizers

The robust labor market affords workers more bargaining power and is fueling recent union victories at high-profile U.S. companies like Amazon, Starbucks, Apple, and more recently, Trader Joe's and Chipotle.

"The labor market by conventional metrics is very tight. Hires are still high historically. Quits are very high," Guy Berger, principal economist at LinkedIn, told The Washington Post. "Workers see a lot of opportunities. The temperature of the labor market is still really hot."

Read more [here](#).



# Members work to ensure high-quality K-12 education by helping schools with programs, policies, and oversight

By KATE STICKLES

Every student in New York deserves a quality education and PEF members at the State Education Department (SED) work daily to make sure educators across the state have the tools, resources, and guidance they need to help students succeed.

The U.S. Department of Education approved New York's Every Student Succeeds Act (ESSA) plan in January 2018. The plan emphasizes fostering equity in education for all students and expands measures for school accountability and student success.

Mary Sapp, a PEF member since 2002 and a former teacher, is supervisor of the practitioner field-based support team in the Office of Accountability at SED, tasked with partnering with schools and districts identified as low-performing through SED's accountability system and overseeing SED's support of these schools and districts.

"Our mission is to ensure that teachers and practitioners have the tools and resources they need to support student achievement," Sapp said. "My job entails the facilitation and supervision of professional educators that are responsible for program development, planning, implementation, and monitoring; technical assistance; and school accountability and improvement." Ms. Sapp currently provides guidance and oversight to professional staff members who work with 'practitioners' in the Field Support Team's Instructional Coaching Consortium, Extending Digital Learning, and new Coaching for Excellence options available to Comprehensive Support and Improvement (CSI) Schools.

The New York accountability system classifies schools into three categories: (1) In Good Standing; (2) Comprehensive Support and Improvement (CSI), made up of schools that performed at level 1 on a combination of ESSA indicators or schools with a graduation rate of less than 67 percent; and (3) Targeted Support and Improvement (TSI), made up of schools with one or more student subgroups performing at a level 1, according to the SED website. Districts are divided into two categories: In Good Standing and Target District.

The Field Support Services team works with these schools and districts on needs assessments, improvement planning, school support, required actions and training. Tasks include developing and refining policy and procedures; providing policy and program guidance to schools; developing and directing program protocols and plans; managing the development of examinations; coordinating provision of technical assistance; overseeing correspondence, research, and guides; supervising professional and support staff in the preparation of written materials, including correspondence and research; and, performing the full range of supervisory duties, Sapp explained.



She is dedicated to quality education, having spent years in New York schools teaching in the fields of elementary, reading, secondary and special education before moving to special education quality assurance and then into special education data collection for Vocational and Educational Services for Individuals with Disabilities.

"What I like most about my job is working with my colleagues and being able to serve the students of New York state," Sapp said. "I like helping to facilitate our work in ensuring equity and access to high-quality educational programs for all students, and promoting continuous improvement by providing support, resources and oversight for schools and local educational agencies in New York."

Sapp is also a very active PEF member, serving on the Region 8 Women's Committee, working as a mobilizer, serving on her division's Outing and Holiday Party committees, and supporting her coworkers as a Steward. She has been a delegate to the PEF Convention since 2003, and at the AFT Convention in 2018 and 2022. Sapp was recently re-elected as secretary of Division 194 after serving two previous terms.

# New handbooks for PEF stewards

By **SHERRY HALBROOK**

Union stewards are labor's first responders — advising members, welcoming new ones and enforcing the contract and state labor law. Without its cadre of stewards, PEF would be lost.

If you are a steward or would like to become one, PEF has developed a new PEF Steward Handbook to ensure you are well equipped and knowledgeable to perform the many roles and duties of union stewardship. The handbook conforms to the current Professional, Scientific and Technical (PS&T) unit contract and state labor law. It contains full-size forms for everything from grievances to protest of mandatory overtime. You can photocopy them as needed or make several copies to have ready when needed.

"Our stewards are the first to recognize opportunities and challenges in the workplace," PEF President Wayne Spence said. "We want to give them all of the information and help we can, and these new handbooks are a great way to do that. Every PEF region offers a series of steward trainings that are taught by our field representatives. These classes are offered virtually and some regions have also returned to making them available in person. Now, our stewards will have these up-to-date handbooks to rely on between trainings and to help them meet every important situation."

The handbook contains 36 pages of information covering 36 topics, including the responsibilities of being a steward, and specific topics such as a contract grievance timetable, an out-of-title work grievance form, counseling, expedited suspension review, demand for arbitration form, health and safety on the job, the Employee Assistance Program, the Committee on Political Education (COPE), Membership Benefits Program, PEF divisions, organizing and much more.

The handbook also contains a glossary of legal terms that stewards need to understand, a map of PEF regions and important phone numbers.



Much of this information is already available on the PEF website, but some stewards have no access to the internet or even a cell phone when they are at work. So having the handbook with them for ready reference when a situation arises can be an important advantage.

PEF is mailing a handbook to every steward and will also include one as part of the welcome kit when new stewards are elected. If you're interested in serving as a steward, you can check if your Division has an opening at <https://www.pef.org/elections/>.





# Statewide officers visit Western New York

By KATE STICKLES

From Long Island to Rochester, PEF's top officers continued their tour of the state with visits to Regions 1, 2, and 3 in August – stopping at 14 worksites and interacting with more than 800 PEF members.

The officers fielded contract questions, talked about the union's Fund Our Future initiative, and delivered breakfast or lunch.

"It's really just our way of saying 'thank you,'" said PEF President Wayne Spence. "As we prepare for the start of contract negotiations in November, we also want to make sure we know what's most important to members. Getting out across the state and engaging with our members puts us in the strongest position going forward."

In advance of planned Town Halls and a member survey, all members are encouraged to email the PEF Contract Team at [Contract2022Suggestions@pef.org](mailto:Contract2022Suggestions@pef.org) with what they think should be the union's priorities in the next contract."

The statewide officers tour previously made stops in Regions 5, 10, 11 and 12.







# Members say MBP family days were great fun

By **SHERRY HALBROOK**

Summer is a time for families to get together and enjoy fun-filled adventures. Members of PEF and PEF Retirees are no exception and they responded enthusiastically when the union's Membership Benefits Program offered discounted tickets to three Family Day events this summer.

"We went to Six Flags Great Escape in Lake George and had such a great time!" said Christy Jaromack of Saratoga Springs. "It was fantastic!"

That event was held August 6 and Jaromack was one of more than 600 PEF members and retirees who, together, bought more than 2,800 tickets for that day from MBP.

A total of 496 members bought nearly 3,000 tickets to the Six Flags Great Adventure Family Day July 9, and 367 more bought just over 1,800 tickets for the Six Flags Darien Lake Family Day July 23.

MBP heard from numerous happy members on social media who took the time to thank the organization for offering the events.

PEF Region 7 Coordinator Barbara Stransky posted: "Great day!!! Thank you, PEF MBP for all your hard work for our members. We appreciate you!"

Greg Carman of Utica wrote: "We had a great time today! Thank you, PEF Membership Benefits Program."

"These positive comments from members mean so much to us," said MBP Administrator Stephanie McLean-Beathley. "Knowing that they and their families really enjoyed these events makes the planning and work we put into them worthwhile."

Not only did the tickets admit members and their families into the parks at discounted prices, they also provided free parking, a buffet lunch and more.

"Our MBP vendors also participated," Beathley said. "Liberty Mutual Insurance, Farmers GroupSelect, SunLife, Stacey Braun Associates, Inc. and Aflac all sent representatives to the Family Day events to answer questions about their products and services."

Altogether, 1,468 members of PEF and PEF Retirees took advantage of the discounts to buy a total of 7,562 tickets for themselves and their families.

"That's great participation," said PEF President Wayne Spence. "Unions are mainly about making our working lives better, but families matter too, and this is just a wonderful way to celebrate together. I join our members in commending MBP for offering them this great and very affordable opportunity."









# Years of advocacy for WNYCPC paying off as \$55M reno begins

By **SHERRY HALBROOK**

Sometimes real, meaningful progress takes a long time. You may even need to fight just for basic survival, but in the end, when all of your efforts start to bloom, you know it was worth it.

That's the happy feeling now for members of PEF Division 167 at Western New York Children's Psychiatric Center in West Seneca, near Buffalo. The center serves children and families in 19 counties and, ultimately, they are the big winners in what has been a very long and drawn out battle, just to see the center survive.

Union officers by buffalo statue at WNYCPCPEF worked with those families, area legislators, civic leaders and many others for five years to derail then governor Andrew Cuomo's plan to close the facility and move the services to Buffalo Psychiatric Center. To everyone's amazement, they eventually prevailed and Cuomo even said he would invest in making capital improvements to the facility, but time, the pandemic and Cuomo's resignation in 2021 seemed to relegate those plans to unfulfilled promises status.

But just a couple weeks ago, on Aug. 2, 2022, Gov. Kathy Hochul and state Mental Health Commissioner Dr. Ann Sullivan announced the state was breaking ground on a \$55 million project to renovate the center and add 50,000 sq. ft. of residential and clinical support space. The existing facility dates from 1970.

"We are so happy and very excited about this," said Division 167 Council Leader Patricia Moran, who has worked at the center for three decades and was assistant council leader during the five-year campaign to save the facility.

"It is great news for our members and all of the staff and the children and their families," said PEF President Wayne Spence. "It took a huge coalition effort by so many people in that region to save WNYCPC, and Stephanie McLean-Beathley who was our council leader there back then, really led that campaign. Scott Dobe is their Executive Board member and he was part of it, too, as well as PEF retiree Dave Chudy. We had strong support from Sen. Patrick Gallivan and many legislators and leaders in western New York. This new investment in the center is welcomed by everyone who fought to save it, and we are very grateful for their hard work and determination."

"We all worked side-by-side together because we care about the children here," Moran said. "In fact, some of our strongest advocates were people who had been treated here when they were adolescents."



PEF Vice President Darlene Williams, Secretary-Treasurer Joe Donahue, MBP Administrator Stephanie McLean-Beathley and WNYCPC Council Leader Patricia Moran pose with 'Miracle' the buffalo outside the WNYCPC.

McLean-Beathley said mental health professionals joined the community in speaking out on the need to save the facility. "It took a lot of people helping us to win that battle." She paid a personal price for her leadership and said she felt that the facility "black-balled" her and passed her over for a promotion. She's now administrator of the PEF Membership Benefits Program.

The renovations will provide many improvements to areas including the pool and auditorium, as well as residential and educational space. The project is expected to take 24 to 28 months and will preserve the current capacity of 46 beds while updating many features to ensure patient and staff safety.

Moran said the renovations and construction will pose new challenges for the center's staff and the youths being treated there, but she is confident that it will go well. The news of the groundbreaking came as a surprise to Moran and the center's PEF members, and she said it made her think of the big green buffalo statue at the center.

"We call that statue 'Miracle' because the coalition – Save Our WNYCPC — paid for its installation and just two weeks later we learned the center would be saved," she said. "Gov. Hochul was our lieutenant governor then, and she was the first to put her handprint on the statue. After that, we all put our handprints on it. It's a real symbol of how strong we are when we all work together."





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to your mobile device or home computer monthly.

[www.pef.org/ecommunicator-signup/](http://www.pef.org/ecommunicator-signup/)



# Training to assist members injured on the job

By KATE STICKLES

PEF health and safety committee chairs from across the state took part in a two-day training conference on worker's compensation August 8 and 9 at the Desmond Hotel in Albany. The workshop included basics of worker's compensation, online resources, the specifics of the PEF contract as it pertains to worker's comp, the role of PEF leaders and staff in the process, and much more. The committee chairs dove deep into the most important information and steps to take when members are injured on the job.

Funding was provided by Article 18 of the NYS/PEF 2019-2023 contract and a NYS Department of Labor Hazard Abatement Board Occupational Safety and Health Training and Education grant.



Pictured, from left, are Vincent Rossillo, Fine, Olin & Anderman; Ed Aluck, PEF Contract Administration; Geraldine Stella, PEF Health and Safety director; Vincent DePaul, NYS Civil Service; Ed Cottrell, Office of Employee Relations Article 18 and 13 co-chair; and Alex Dell, Law Firm of Alex Dell, PLLC.



# PEF member's daughter tapped for Union Plus scholarship

By KATE STICKLES

Emily Wenke, the daughter of PEF member Joanne Wenke, received a \$550 Union Plus scholarship for 2022.

Emily is going into her second year of college at St. John's University in Queens. She attended Saratoga Central Catholic High School and graduated as valedictorian as well as completed dual enrollment credits at Hudson Valley Community College.

In addition to the Union Plus scholarship, Emily has received PEF's Joseph Scacalossi Scholarship, the PEO Star Scholarship and Griswold Scholarships, the Saratoga Springs Rotary Club's Endowed Scholarship in Honor of Charles V. Wait, Sr., and SEFCU's Campus Connect and Roma Intangible Lodge #215 scholarships. She also receives the NYS Scholarship for Academic Excellence.

At St. John's, Emily participates in Alpha Phi Omega, a co-ed service fraternity, Delta Phi Epsilon, Project Sunshine, Wellness Peer Educators, and is a Student Equity Worker. She is also involved with Campus Ministry and enjoys going on Midnight Runs into Manhattan to provide food and other necessities to people in need.

Emily studies childhood education with a concentration in biology and hopes to pursue special education for her master's degree. Outside of her extracurriculars and classes, she works with young adults with intellectual and developmental disabilities during the school year.

In her free time, Emily enjoys going thrift shopping, trying new foods, and hanging out with her dog, Walter.

"I am so thankful to our union for all of the opportunities that she has been able to pursue in terms of financing her education," her mother Joanne said.

Union Plus scholarship awards are presented annually to union members or members of their families who want to begin or continue their post-secondary education. In 2022, 189 union members and union family members have been awarded \$200,000 in scholarships, ranging from \$500 to \$4,000.

For more information on Union Plus scholarships and to apply for the 2023 awards, [click here](#). When applying, note that PEF is AFT Local 4053.





**NEW YORK STATE PUBLIC EMPLOYEES FEDERATION  
AND SUBSIDIARY**

**Consolidated Financial Statements as of  
March 31, 2022 and 2021  
Together with  
Independent Auditor's Report**

**Bonadio & Co., LLP**  
Certified Public Accountants

## **INDEPENDENT AUDITOR'S REPORT**

August 23, 2022

To the Officers and Trustees of  
New York State Public Employees Federation and Subsidiary:

### **Opinion**

We have audited the accompanying consolidated financial statements of New York State Public Employees Federation (a nonprofit organization) and Subsidiary, which comprise the consolidated statements of financial position as of March 31, 2022 and 2021, and the related consolidated statements of activities and change in net assets, functional expenses, and cash flows for the years then ended, and the related notes to the consolidated financial statements.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of New York State Public Employees Federation and Subsidiary as of March 31, 2022 and 2021, and the changes in their net assets and their cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

### **Basis for Opinion**

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of New York State Public Employees Federation and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### **Responsibilities of Management for the Consolidated Financial Statements**

Management is responsible for the preparation and fair presentation of the consolidated financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the consolidated financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about New York State Public Employees Federation's ability to continue as a going concern within one year after the date that the consolidated financial statements are available to be issued.

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(Continued)

## **INDEPENDENT AUDITOR'S REPORT**

(Continued)

### **Auditor's Responsibilities for the Audit of the Financial Statements**

Our objectives are to obtain reasonable assurance about whether the consolidated financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our 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 consolidated financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the consolidated 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 consolidated 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 New York State Public Employees Federation'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 consolidated financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about New York State Public Employees Federation's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

### **Report on Consolidating and Supplementary Information**

Our audits were conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The consolidating information on Schedules I thru IV is presented for purposes of additional analysis of the consolidated financial statements rather than to present the financial position and results of the individual companies and are not a required part of the consolidated financial statements. 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 consolidated financial statements. The information has been subjected to the auditing procedures applied in the audit of the consolidated financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the consolidated financial statements or to the consolidated financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole.

*Bonadio & Co., LLP*



# NEW YORK STATE PUBLIC EMPLOYEES FEDERATION AND SUBSIDIARY

## CONSOLIDATED STATEMENTS OF FINANCIAL POSITION MARCH 31, 2022 AND 2021

	<u>2022</u>	<u>2021</u>
<b>ASSETS</b>		
CURRENT ASSETS:		
Cash and cash equivalents	\$ 9,307,479	\$ 9,354,958
Investments	13,472,996	12,216,984
Membership dues receivable, net	308,804	174,122
Due from related parties and other receivables	2,353,732	1,615,796
Prepaid expenses	547,881	438,317
Total current assets	<u>25,990,892</u>	<u>23,800,177</u>
PROPERTY AND EQUIPMENT, NET	<u>4,905,192</u>	<u>4,684,462</u>
OTHER ASSETS:		
Restricted cash - COPE	89,636	101,467
Deposits	322,424	324,892
Total other assets	<u>412,060</u>	<u>426,359</u>
	<u>\$ 31,308,144</u>	<u>\$ 28,910,998</u>
<b>LIABILITIES AND NET ASSETS</b>		
CURRENT LIABILITIES:		
Accounts payable	\$ 655,531	\$ 1,109,699
Capital lease obligation, current portion	81,548	77,533
Employee organizational leave	350,000	1,047,813
Accrued liabilities	1,464,171	1,672,463
Accrued vacation	1,021,285	909,704
Total current liabilities	<u>3,572,535</u>	<u>4,817,212</u>
LONG-TERM LIABILITIES		
Capital lease obligation, net of current maturities	230,746	312,294
Accrued post-retirement benefits	12,293,906	12,292,603
Total long-term liabilities	<u>12,524,652</u>	<u>12,604,897</u>
Total liabilities	<u>16,097,187</u>	<u>17,422,109</u>
NET ASSETS:		
Net assets (deficit) without donor restrictions:		
Designated by board	7,420,334	6,989,185
Post-retirement costs recognized in net assets	459,354	(78,859)
Undesignated	7,241,633	4,477,096
Total net assets without donor restrictions	15,121,321	11,387,422
Net assets with donor restrictions	89,636	101,467
Total net assets	<u>15,210,957</u>	<u>11,488,889</u>
	<u>\$ 31,308,144</u>	<u>\$ 28,910,998</u>

The accompanying notes are an integral part of these statements.

# NEW YORK STATE PUBLIC EMPLOYEES FEDERATION AND SUBSIDIARY

## CONSOLIDATED STATEMENTS OF ACTIVITIES AND CHANGE IN NET ASSETS FOR THE YEARS ENDED MARCH 31, 2022 AND 2021

	<u>2022</u>	<u>2021</u>
CHANGES IN NET ASSETS WITHOUT DONOR RESTRICTIONS:		
REVENUES AND GAINS:		
Membership dues	\$ 38,609,753	\$ 35,902,820
Less:		
Divisional distributions	913,682	465,876
Per capita taxes, net	9,108,154	9,419,372
Affiliation dues	293,910	299,492
Net membership dues	<u>28,294,007</u>	<u>25,718,080</u>
Other support:		
Interest and dividend income	210,167	203,020
Net unrealized and realized gains (losses)	(89,329)	1,461,099
Grant income	521,174	531,100
Advertising income	31,039	16,528
Other income	<u>1,050,922</u>	<u>963,566</u>
Total other support	<u>1,723,973</u>	<u>3,175,313</u>
Net assets released from restrictions:		
Satisfaction of program restrictions	<u>194,701</u>	<u>180,795</u>
Total revenues, gains and other support	<u>30,212,681</u>	<u>29,074,188</u>
EXPENSES:		
Salary and benefit expenses	20,169,135	18,825,042
Staff travel and related expenses	530,040	344,091
Program related expenses	787,683	653,494
Operating expenses	5,058,089	4,353,688
Depreciation	<u>472,048</u>	<u>249,463</u>
Total expenses	<u>27,016,995</u>	<u>24,425,778</u>
CHANGE IN NET ASSETS WITHOUT DONOR RESTRICTIONS BEFORE OTHER CHANGES IN NET ASSETS WITHOUT DONOR RESTRICTIONS	3,195,686	4,648,410
OTHER CHANGES IN NET ASSETS:		
Post-retirement changes other than net periodic benefit costs	<u>538,213</u>	<u>877,494</u>
TOTAL CHANGE IN NET ASSETS WITHOUT DONOR RESTRICTIONS	<u>3,733,899</u>	<u>5,525,904</u>
CHANGES IN NET ASSETS WITH DONOR RESTRICTIONS:		
Contributions	182,870	184,801
Net assets released from restrictions	<u>(194,701)</u>	<u>(180,795)</u>
TOTAL CHANGE IN NET ASSETS WITH DONOR RESTRICTIONS	<u>(11,831)</u>	<u>4,006</u>
TOTAL CHANGE IN NET ASSETS	3,722,068	5,529,910
NET ASSETS - beginning of year	<u>11,488,889</u>	<u>5,958,979</u>
NET ASSETS - end of year	<u>\$ 15,210,957</u>	<u>\$ 11,488,889</u>

The accompanying notes are an integral part of these statements.

**NEW YORK STATE PUBLIC EMPLOYEES FEDERATION AND SUBSIDIARY**

**CONSOLIDATED STATEMENTS OF FUNCTIONAL EXPENSES  
FOR THE YEARS ENDED MARCH 31, 2022 AND 2021**

	2022			2021		
	<u>Program Services</u>	<u>Management and General</u>	<u>Total</u>	<u>Program Services</u>	<u>Management and General</u>	<u>Total</u>
Salaries	\$ 10,292,646	\$ 1,166,852	\$ 11,459,498	\$ 9,664,381	\$ 1,294,910	\$ 10,959,291
Per capita	9,108,156	-	9,108,156	9,419,372	-	9,419,372
Benefits	5,618,646	1,581,675	7,200,321	5,268,915	1,131,946	6,400,861
Member meeting expense	1,219,736	-	1,219,736	122,852	14	122,866
Rent	1,078,655	27,676	1,106,331	1,077,888	37,556	1,115,444
Professional fees	951,169	124,490	1,075,659	528,868	125,474	654,342
Payroll taxes	870,120	85,282	955,402	823,617	133,024	956,641
Division	913,682	-	913,682	465,876	-	465,876
Advertising	546,994	17,422	564,416	467,654	96	467,750
Union leave	555,466	-	555,466	508,249	-	508,249
Staff transportation	515,461	13,014	528,475	339,350	4,741	344,091
Depreciation	359,161	112,885	472,046	202,075	47,388	249,463
Computer fees	9,097	306,615	315,712	9,220	71,961	81,181
Affiliation	293,910	-	293,910	299,492	-	299,492
Arbitration	212,941	-	212,941	140,935	-	140,935
Telephone	110,323	97,824	208,147	143,376	55,623	198,999
COPE	194,701	-	194,701	180,795	-	180,795
Postage	150,324	18,967	169,291	71,777	-	71,777
Reproduction	198,040	(32,229)	165,811	87,981	-	87,981
Insurance	84,970	69,661	154,631	84,371	91,091	175,462
Office supplies	58,638	77,741	136,379	40,130	46,350	86,480
Legislative	122,535	-	122,535	274,490	-	274,490
Books & reference material	98,888	942	99,830	106,381	2,900	109,281
Utility	28,185	64,499	92,684	48,963	34,662	83,625
Janitorial & Security	77,981	13,070	91,051	29,387	2,991	32,378
Maintenance and repair	4,005	64,161	68,166	147	136,301	136,448
Minor equipment purchases	17,381	45,764	63,145	7,074	15,168	22,242
Temporary hire	58,954	-	58,954	-	-	-
Scholarships	45,200	-	45,200	45,250	-	45,250
Steno and transcript fees	31,077	-	31,077	42,230	-	42,230
Contributions	10,883	-	10,883	250,977	-	250,977
Taxes	7,806	-	7,806	6,506	-	6,506
Equipment rental	375	-	375	510	-	510
Loss on disposition of property and equipment	-	-	-	35,135	-	35,135
Employee organizational leave	(427,674)	-	(427,674)	530,628	-	530,628
Miscellaneous	2,468	55,530	57,998	-	53,470	53,470
Total	<u>\$ 33,420,900</u>	<u>\$ 3,911,841</u>	<u>\$ 37,332,741</u>	<u>\$ 31,324,852</u>	<u>\$ 3,285,666</u>	<u>\$ 34,610,518</u>

The accompanying notes are an integral part of these statements.



# NEW YORK STATE PUBLIC EMPLOYEES FEDERATION AND SUBSIDIARY

## CONSOLIDATED STATEMENTS OF CASH FLOWS FOR THE YEARS ENDED MARCH 31, 2022 AND 2021

	<u>2022</u>	<u>2021</u>
CASH FLOWS FROM OPERATING ACTIVITIES:		
Change in net assets	\$ 3,722,068	\$ 5,529,910
Adjustments to reconcile change in net assets to net cash flow from operating activities:		
Depreciation	472,048	249,463
Loss on disposition of property and equipment	-	35,135
Net unrealized and realized gains	89,329	(1,461,099)
Changes in:		
Membership dues receivable	(134,682)	843,871
Due from related parties and other receivables	(737,936)	(106,179)
Prepaid expenses	(109,564)	(66,469)
Deposits	2,468	(169)
Accounts payable and other accrued liabilities	(662,460)	19,954
Employee organizational leave	(697,813)	252,920
Accrued vacation	111,581	168,336
Accrued postretirement benefits	1,303	(236,780)
NET CASH FLOW FROM OPERATING ACTIVITIES	<u>2,056,342</u>	<u>5,228,893</u>
CASH FLOWS FROM INVESTING ACTIVITIES:		
Purchase of investments	(4,504,842)	(1,885,517)
Proceeds from sale of investments	3,159,501	1,538,501
Purchases of property and equipment	<u>(692,778)</u>	<u>(2,997,655)</u>
NET CASH FLOW FROM INVESTING ACTIVITIES	<u>(2,038,119)</u>	<u>(3,344,671)</u>
CASH FLOWS FROM FINANCING ACTIVITIES:		
Principal payments on capital lease obligation	(77,533)	(52,617)
Proceeds from purchase of capital lease obligation	<u>-</u>	<u>420,995</u>
NET CASH FLOW FROM FINANCING ACTIVITIES	<u>(77,533)</u>	<u>368,378</u>
CHANGE IN CASH, CASH EQUIVALENTS, AND RESTRICTED CASH	(59,310)	2,252,600
CASH, CASH EQUIVALENTS, AND RESTRICTED CASH - beginning of year	<u>9,456,425</u>	<u>7,203,825</u>
CASH, CASH EQUIVALENTS, AND RESTRICTED CASH - end of year	<u>\$ 9,397,115</u>	<u>\$ 9,456,425</u>
SUPPLEMENTAL DISCLOSURES OF CASH FLOW INFORMATION		
Cash paid during the year for interest	<u>\$ 17,939</u>	<u>\$ 8,829</u>
CASH AND CASH EQUIVALENTS AND RESTRICTED CASH CONSIST OF THE FOLLOWING:		
Cash and cash equivalents	\$ 9,307,479	\$ 9,354,958
Restricted cash - COPE	<u>89,636</u>	<u>101,467</u>
	<u>\$ 9,397,115</u>	<u>\$ 9,456,425</u>

The accompanying notes are an integral part of these statements.

# NEW YORK STATE PUBLIC EMPLOYEES FEDERATION AND SUBSIDIARY

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

**MARCH 31, 2022 AND 2021**

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### 1. THE ORGANIZATION

The New York State Public Employees Federation (PEF) is affiliated with the American Federation of Teachers (AFT) and the Service Employees International Union (SEIU). PEF is a self-governing unit representing predominantly the professional, scientific and technical employees of the State of New York.

PEF Land Holding Corporation was formed to hold title to the land and office building used to house PEF's headquarters.

The two companies, together, are hereafter referred to as the "Organization."

### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

#### **Basis of Accounting**

The consolidated financial statements have been prepared in accordance with accounting principles generally accepted in the United States of America.

#### **Use of Estimates**

The preparation of consolidated financial statements in accordance with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the consolidated financial statements and the reported amounts of revenue and expenses during the reporting period. Actual results could differ from those estimates, particularly given the economic disruptions and uncertainties associated with the ongoing COVID-19 pandemic, and such differences may be significant.

#### **Principles of Consolidation**

The consolidated financial statements include the accounts of PEF and its subsidiary, PEF Land Holding Corporation. PEF and PEF Land Holding Corporation have been consolidated because they have common control. The Executive Officers of the PEF Board of Directors are also the Officers for the PEF Land Holding Corporation. All significant intercompany transactions and balances have been eliminated.

PEF leases their operating facilities from PEF Land Holding Corporation

#### **Cash and Cash Equivalents**

Cash and cash equivalents include cash and money market funds, with an original maturity of less than three months. The Organization's cash balances may at times exceed federally insured limits. The Organization has not experienced any losses in these accounts and believes they are not exposed to any significant risk with respect to cash and cash equivalents.

#### **Restricted Cash**

Restricted cash represents COPE contributions received from members. These funds are segregated and forwarded to both AFT COPE and SEIU COPE.

## 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

### Investments

The Organization invests in various types of investment securities which are stated at fair value based on quoted market prices. Investment securities are exposed to various risks, such as interest rate, market, and credit risk. Due to the level of risk associated with certain investment securities, it is at least reasonably possible that changes in the values of investment securities will occur in the near term and that such changes could materially affect the amounts reported in the accompanying consolidated financial statements.

Purchases and sales of securities are recorded on a trade-date basis. Interest income is recorded on the accrual basis. Dividends are recorded on the ex-dividend date. Net appreciation (depreciation) includes the Organization's gains and losses on investments bought and sold as well as held during the year.

### Receivables

Membership dues receivable, and other receivables are stated at the unpaid balances net of allowances for doubtful accounts. The carrying amount of the receivables is reduced by an allowance for doubtful accounts that reflects management's best estimate of the amounts that will not be collected. Management periodically evaluates uncollected receivables based on aging and balances. The allowance method is used for providing bad debts from receivables. Accounts are written-off when management determines they are uncollectible. Management reviewed the balances and believes an allowance of \$25,000 is reasonable as of March 31, 2022 and 2021.

Due from related parties and other receivables consists of amounts due from entities that share common members or from PEF members themselves.

### Property and Equipment

Property and equipment are carried at cost. Depreciation is computed using the straight-line and accelerated methods, which are designed to amortize the cost of various classes of assets over their estimated useful lives. The ranges of estimated useful lives used in computing financial reporting depreciation are as follows:

Building and improvements	31.5 years
Furniture, fixtures and equipment	3-10 years
Automobiles	3-10 years
Computer equipment	3-10 years

Expenditures for maintenance, repairs, and renewals of relatively minor items are generally charged to expense as incurred while replacements of significant items are capitalized. The cost and accumulated depreciation of property items sold or retired are eliminated from the accounts, and the resulting profit or loss is included in income. On an on-going basis, the Organization assesses impairment of its property and records the appropriate adjustments, if necessary.



## 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

### Revenue Recognition

#### *Membership Dues*

The Organization derives its revenue primarily through the collection of dues from members using a standard percentage withheld of a members' annual compensation during each pay period worked and received by PEF each pay cycle. In return for their dues, members receive the following benefits, which are also the Organization's performance obligations: labor representation, meeting and convention education, labor education, monthly publications, and political actions in local, state, and federal governments. In accordance with Topic 606, revenue shall be recognized upon satisfaction of performance obligations. Therefore, revenue from member dues is recognized ratably over the course of the membership period as the related performance obligations are provided consistently throughout the period. The transaction price is the amount of consideration to which the Organization expects to be entitled in exchange for providing the member benefits, which are established in the Organization's policy manual.

The Organization records membership dues as revenue based on the amounts collected from members. The Organization is the primary affiliation for the members. A portion of the dues are payable to parent Organizations, affiliated divisions and regions, and labor councils as follows:

Divisional Distributions: Divisional Distributions represent allocations to local organizations of PEF members. Each division was allocated \$31.39 per member up to 200 members for both the years ended March 31, 2022 and 2021. For larger divisions, the distribution allocated in excess of 200 members was \$25.12 for both the years ended March 31, 2022 and 2021.

Per Capita Taxes: PEF is required to pay per capita taxes on a monthly basis to AFT and SEIU as a result of its affiliation with these organizations. Per capita taxes are presented net of the AFT constitutional rebates of \$142,454 and \$146,752 for the years ended March 31, 2022 and 2021, respectively.

Affiliation Dues: Affiliation dues are amounts paid by PEF to participate with other labor organizations in various labor councils in New York State.

#### *Grant Revenue*

The Organization completes applications of grants available for funding from New York State (NYS) programs offered through its various departments. In order to receive the funds, the Organization fulfills and maintains certain eligibility requirements listed out within the applicable grant agreements. Documentation detailing the compliance of these stipulations is submitted to the respective NYS departments for specific time periods, typically on a quarterly basis. The Organization recognizes revenue from grants ratably over the course of the relevant grant period, as the conditions are met.

#### *Shared Services Revenue*

A related entity, Public Employees Federation Member Benefits Program, utilizes a number of the Organization's employees from multiple departments to aid in the completion of administrative functions. The Organization bills the related entity monthly for a portion of each of the employees' salary, payroll taxes and benefits based on a percentage for each department agreed upon between the parties. Revenue is recognized from shared services over time, as the services are provided on a consistent basis throughout the period. The transaction price is the amount of consideration to which the Organization expects to be entitled in exchange for the services provided. Shared services revenue is included in other income on the consolidated statements of activities and changes in net assets.

## 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

### Revenue Recognition (Continued)

#### *Advertising Income*

Advertising income is net of provision for doubtful accounts and in-kind charges. The Organization recognizes revenue at a point in time based on advertising provided at published rates.

#### Timing of Revenue Recognition

Revenue by revenue recognition methodology was as follows for the years ending March 31:

	<u>2022</u>	<u>2021</u>
<u>Contract Revenue Types</u>		
Goods and services transferred over time	\$ 39,660,675	\$ 37,397,486
Goods and services transferred at a point in time	31,039	16,528
Revenue recognized outside the scope of ASC606	<u>642,012</u>	<u>1,664,119</u>
	<u>\$ 40,333,726</u>	<u>\$ 39,078,133</u>

#### Contract Balances

The timing of revenue recognition may not align with the right to invoice the member. The Organization records accounts receivable when it has the unconditional right to issue an invoice and receive payment, regardless of whether revenue has been recognized. If revenue has not yet been earned, unearned revenue (a contract liability) is recorded. The beginning and ending contract balances were as follows at March 31:

	<u>2022</u>	<u>2021</u>	<u>2020</u>
Membership dues receivable, net	<u>\$ 308,804</u>	<u>\$ 174,122</u>	<u>\$ 1,017,993</u>
Due from related parties and other receivables	<u>\$ 2,353,732</u>	<u>\$ 1,615,796</u>	<u>\$ 1,509,617</u>
Unearned revenue	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 2,051</u>

#### Contract with New York State

The majority of PEF's revenue is earned through dues remittances from professional, scientific and technical employees of the State of New York. An agreement was reached between the Organization and New York State formalizing a contract renewal from April 2, 2019 through April 1, 2023. The contract was ratified by the membership on July 27, 2021, and the agreement made final.

## 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

### Functional Expenses

In the Statement of Functional Expenses, expenses have been reported by their functional classification, a method of grouping expenses according to the purpose for which they were incurred. The primary functional classifications are program services and management and general activities. Program services are the activities that result in services being provided to members that fulfill the purposes or mission for which the organization exists. Management and general activities are all activities of an organization, other than program services. Certain costs have been allocated among the programs and supporting services benefitted. Expenses are allocated to program and management and general based on where time and efforts are made, and benefit received. Depreciation and certain building costs were allocated based on departmental square footage. Certain management and communication costs were based on departmental full time equivalent headcount.

### Financial Reporting

The Organization reports its net assets and changes therein in the following classifications:

- Net Assets Without Donor Restrictions are net assets that are not subject to donor imposed stipulations and are therefore available for the support of the Organization's operational activities. In addition, net assets without donor restrictions include other resources designated by the Board for specific purposes. Designations include new contract campaigns, member mobilization or political action. Any change in designations requires approval by at least three-quarters of the Executive Board.
- Net Assets With Donor Restrictions are net assets whose use by the Organization is limited by donor imposed stipulations. This category of net assets represents donor imposed restrictions that permit the Organization to use up or expend the donated assets as specified. These restrictions are satisfied either by the passage of time or by actions of the Organization.

### Union Agreements

Most of the Organization's wages were paid to employees subject to a collective bargaining agreement. The union and expiration date of the collective bargaining agreement that cover applicable employees is as follows:

<u>Union</u>	<u>Expiration Date</u>
United Steelworkers, AFL-CIO, CLC Local 9265	June 30, 2022

Although the expiration date has passed and contract negotiations continue, PEF is committed to complying with the terms of the expired agreement until a new agreement is reached.

### Advertising Costs

The Organization expenses advertising costs as incurred. The total advertising expense for the years ended March 31, 2022 and 2021 was \$568,807 and \$467,750, respectively.

### Tax Status

PEF is a not-for-profit unincorporated association and is exempt from income taxes as an organization qualified under Section 501(c)(5) of the Internal Revenue Code. The PEF Land Holding Corporation is exempt from federal income taxes under the provisions of Section 501(c)(2) of the Internal Revenue Code.

### Reclassifications

Certain reclassifications have been made to the prior year statements to conform to the current year presentation.

### 3. LIQUIDITY

The Organization is substantially supported by membership dues. In addition, some support is received through grants from New York State and other private organizations which do not have donor restrictions. As of March 31, 2022 **and 2021**, the Organization has the following liquid resources available to meet cash needs for general expenditures within one year of the statement of financial position date:

	<u>2022</u>	<u>2021</u>
Financial assets:		
Cash and cash equivalents	\$ 9,307,479	\$ 9,354,958
Investments	13,472,996	12,216,984
Membership dues receivable, net	308,804	174,122
Due from related parties and other receivables	2,353,732	1,615,796
Restricted cash	<u>89,636</u>	<u>101,467</u>
Total financial assets	<u>25,532,647</u>	<u>23,463,327</u>
Less: Assets unavailable for general expenditure		
Net assets with donor restrictions	(89,636)	(101,467)
Net assets designated by board	<u>(7,420,334)</u>	<u>(6,989,185)</u>
	<u>(7,509,970)</u>	<u>(7,090,652)</u>
Total financial assets available to meet cash needs for general expenditures within one year	<u>\$ 18,022,677</u>	<u>\$ 16,372,675</u>

The Organization has \$18,022,677 and \$16,372,675 of financial assets available within one year of the date of the statement of financial position to meet cash needs for general expenditures as of March 31, 2022 **and 2021**, respectively. The membership dues receivable amounts due from related parties and other receivables, and other assets are subject to implied time restrictions, but are expected to be collected within one year.

### 4. INVESTMENTS

The Organization's investments are held at a brokerage firm and managed under a separate contract by an investment management company. The following presents the fair values of investments as of March 31:

	<u>2022</u>	<u>2021</u>
U.S Treasury notes and bills	\$ 8,982,694	\$ 7,788,869
GNMA pass-thru securities	42,251	55,683
Equity securities	4,313,609	4,181,231
Corporate bonds	<u>134,442</u>	<u>191,201</u>
	<u>\$ 13,472,996</u>	<u>\$ 12,216,984</u>



## 5. PROPERTY AND EQUIPMENT

Property and equipment consist of the following at March 31:

	<u>2022</u>	<u>2021</u>
Land	\$ 165,905	\$ 165,905
Building	1,846,198	1,846,198
Building Improvements	3,626,332	672,544
Furniture, fixtures and equipment	868,458	851,017
Automobiles	70,715	70,715
Computer equipment	2,600,656	1,093,657
Construction in progress	<u>-</u>	<u>3,785,452</u>
	9,178,264	8,485,488
Less: Accumulated depreciation and amortization	<u>(4,273,072)</u>	<u>(3,801,026)</u>
Property and equipment, net	<u>\$ 4,905,192</u>	<u>\$ 4,684,462</u>

Depreciation and amortization expense amounted to \$472,048 and \$249,463 for the years ended March 31, 2022 and 2021, respectively.

## 6. POLITICAL ACTION FUND

PEF maintains a Political Action Fund (the Fund) from which political contributions are disbursed. Contributions are approved by PEF's Executive Board and funded from PEF's net assets without donor restrictions. The Fund is administered within PEF by the Legislative Department, which is also responsible for other lobbying activities.

## 7. EMPLOYEE BENEFIT PLANS

### Pension Plan Summary

Substantially all employees of PEF are eligible to participate in the Affiliates Officers and Employees Pension Plan of SEIU (the Pension Plan). The Pension Plan is a defined benefit multiemployer pension plan. Total pension expense was \$2,266,121 and \$2,150,264 for the years ended March 31, 2022 and 2021, respectively. These amounts are based upon a contribution rate of 21% of total eligible employee compensation. Actuarial and plan asset data relating to employees of PEF is not available.

The risks of participating in a multiemployer plan are different from a single-employer plan in the following aspects: (1) assets contributed to the multiemployer plan by one employer may be used to provide benefits to employees of other participating employers; (2) if a participating employer stops contributing to the plan, the unfunded obligations of the plan may be borne by the remaining participating employers; (3) if the Organization chooses to stop participating in the multiemployer plan, they may be required to pay the Pension Plan an amount based on the funded status of the plan, referred to as a withdrawal liability. The Organization currently has no intention of withdrawing from the multiemployer pension plan.

## 7. EMPLOYEE BENEFIT PLANS (Continued)

### Pension Plan Summary (Continued)

PEF's contributions to the Pension Plan do not represent more than 5% of total contributions to the Pension Plan.

The following table represents information about the Pension Plan as of and for the years ended March 31, 2022 **and 2021**, which is the most recent date for which the PPA zone status is available. The zone status is based on information received from the plan and is certified by the plan's actuary:

Pension Trust Fund	Employer Identification Number (Plan Number)	Pension Protection Act ("PPA") Certified Zone Status	FIP/RP Status Pending / Implemented	Contributions		Surcharge Imposed	Expiration Date of Collective Bargaining Agreement
				3/31/2022	3/31/2021		
SEIU Affiliates Officers and Employees Pension Plan	52-0812348 (001)	Green 12/31/20	Green 12/31/19 N/A	\$ 2,266,121	\$ 2,150,264	N/A	6/30/2022

### Defined Contribution Plans

PEF also has two defined contribution plans covering all full-time employees with three (3) months of eligible service. Under the USWA plan, PEF shall make a 3% safe harbor contribution annually on behalf of each eligible employee. Under the Management Confidential plan, PEF shall make an employee matching contribution annually on behalf of each participant in an amount equal to 2% of the active participant's compensation contributed to the plan. In addition to the 2% matching contribution under the Management Confidential plan, those eligible employees covered under this plan will also receive a 3% safe harbor contribution. These amounts were negotiated in the USWA/PEF Contract and the Management Confidential benefit synopsis and approved by the Executive Board. The total retirement expense for the two defined contribution plans was \$393,767 and \$374,290 for the years ended March 31, 2022 **and 2021**, respectively.

## 8. ACCRUED POSTRETIREMENT BENEFITS

Retired PEF employees can convert unused sick leave to cash for the purpose of paying health insurance benefits. To be eligible, retiring employees must meet one of the three following criteria: sixty-five years of age and three years of service; fifty-five years of age and ten years of service; or age fifty and thirty years of service. PEF recognizes the cost of providing postretirement health insurance benefits by estimating the accumulated postretirement benefit. It is at least reasonably possible that this significant estimate will change within the next year.

In 2004, PEF established a Retiree Premium Fund and contributed a percentage of salary to a fund dedicated to assist retirees with payment of their health insurance premiums. PEF contributed into the fund until 2011 when the contractual obligation to contribute ceased. Beginning with the contract year commencing July 1, 2019, PEF is again required contribute a defined contribution of 1.0% of total gross compensation of the entire USWA bargaining unit into the Retiree Premium Fund for the period July 1, 2019 until June 30, 2020, and each year thereafter. The same will be done for the entire Management/Confidential employee unit.

## 8. ACCRUED POSTRETIREMENT BENEFITS (Continued)

Employees of the Public Employees Federation Membership Benefits Program (the Program) are covered under the postretirement health care benefit. PEF assumes all liability related to this benefit for its employees as well as the Program's employees. For years in which PEF makes benefit payments on behalf of Program employees, PEF will bill the Program for those costs.

The following table sets forth the plan's status reconciled with the amount shown in PEF's statements of financial position at March 31:

	<u>2022</u>	<u>2021</u>
Accumulated postretirement benefit obligation:		
Benefit obligation at beginning of year	\$ 12,292,602	\$ 12,529,382
Service cost	823,766	917,714
Interest cost	419,509	351,099
Medicare Part D Drug Subsidy	(7,981)	(9,633)
Benefits paid	(703,758)	(628,099)
Recognition of actuarial loss (gain)	<u>(530,232)</u>	<u>(867,861)</u>
Benefit obligation at end of year	<u>\$ 12,293,906</u>	<u>\$ 12,292,602</u>
Fair value of plan net assets at end of year	<u>\$ -</u>	<u>\$ -</u>
Accumulated postretirement benefit obligation: in excess of plan assets	<u><u>\$ 12,293,906</u></u>	<u><u>\$ 12,292,602</u></u>

The net periodic postretirement health care benefit cost for the years ended March 31, 2022 and 2021 consist of the following components:

	<u>2022</u>	<u>2021</u>
Service cost	\$ 823,766	\$ 917,714
Interest cost	<u>419,509</u>	<u>351,099</u>
Net periodic postretirement benefit cost	<u><u>\$ 1,243,275</u></u>	<u><u>\$ 1,268,813</u></u>

The expected effect of unamortized items in the unrestricted net assets in the next fiscal year is as follows:

Amortization of unrecognized prior service cost (credit)	<u><u>\$ -</u></u>
Amortization of unrecognized actuarial loss	<u><u>\$ -</u></u>

## 8. ACCRUED POSTRETIREMENT BENEFITS (Continued)

The assumptions used in the measurement of the Organization's net periodic benefit costs and benefit obligations are shown in the following table for the years ended March 31:

	<u>2022</u>	<u>2021</u>
Net periodic benefit cost for the year:		
Discount rate	3.21%	3.03%
Benefit obligation at year end:		
Discount rate	4.20%	3.21%

Assumed health care cost trend rates have a significant effect on the amounts reported for the health care plans. A one-percentage point change in the health care trend rates would have the following effects on the accrued postretirement benefit:

	<u>One Point Increase</u>	<u>One Point Decrease</u>
Effect on total of service and interest cost components	\$ 178,000	\$ (144,000)
Effect on postretirement benefit obligation	\$ 1,226,000	\$ (1,038,000)

The measurement date used to determine the 2022 amounts was March 31, 2022. The annual healthcare trend rate assumption used for fiscal year end 2022 is 7.0% (6.0% post 65) grading down by .25% each year until the ultimate rate of 4.0% is reached.

The following estimated benefit payments, which reflect expected future service, as appropriate, are expected to be paid:

### Years Ending March 31,

2023	\$ 487,000
2024	515,000
2025	576,000
2026	606,000
2027	661,000
2028 to 2032	<u>3,544,000</u>
Total	<u>\$ 6,389,000</u>

The plan is unfunded and therefore, contributions equal benefits paid.



**9. BOARD DESIGNATED NET ASSETS WITHOUT DONOR RESTRICTIONS AND NET ASSETS WITH DONOR RESTRICTIONS**

Board Designated net assets without donor restrictions have been designated for the following purposes at March 31:

	<u>2022</u>	<u>2021</u>
Divisions	\$ 1,362,201	\$ 1,495,818
Contract fightback	<u>6,058,133</u>	<u>5,493,367</u>
Total board designated net assets	<u>\$ 7,420,334</u>	<u>\$ 6,989,185</u>

Net assets with donor restrictions at March 31, 2022 **and 2021** are available for the following purposes:

	<u>2022</u>	<u>2021</u>
COPE:		
Political Contributions	<u>\$ 89,636</u>	<u>\$ 101,467</u>

Changes in net assets with donor restrictions for the years ended March 31, 2022 **and 2021** consisted of the following:

	<u>2022</u>	<u>2021</u>
COPE:		
Contributions received with donor restrictions	<u>\$ 182,870</u>	<u>\$ 184,801</u>
Net assets released from donor restrictions by		
incurring expenses satisfying the restricted purpose	<u>\$ 194,701</u>	<u>\$ 180,795</u>

## 10. COMMITMENTS AND CONTINGENCIES

### Leases

PEF has entered into a variety of leases, primarily for the use of office space and equipment, which are accounted for as operating leases. In addition, PEF has certain office and computer equipment leases that are accounted for as capital leases. Included within "furniture, fixtures and equipment" is equipment held under a capital lease with a cost basis of \$481,031 and accumulated amortization of \$186,334 and \$102,135, as of March 31, 2022 **and 2021**, respectively. Future minimum payments under all noncancelable operating leases having initial terms in excess of one year at March 31, 2022 consist of the following:

	Capital <u>Leases</u>	Operating <u>Leases</u>
Year ending March 31:		
2023	\$ 95,473	902,980
2024	95,473	934,229
2025	95,473	941,401
2026	55,692	852,091
2027	-	695,207
Thereafter	<u>-</u>	<u>500,484</u>
Total	342,111	<u>\$ 4,826,392</u>
Less amounts representing interest:	<u>(29,817)</u>	
Present Value of Net Minimum Lease Payments	312,294	
Less: Current maturities of capital lease obligations	<u>(81,548)</u>	
Capital Lease Obligations, net of current maturities	<u>\$ 230,746</u>	

Total rental expense related to operating leases for the years ended March 31, 2022 and 2021 was \$1,106,332 and \$1,115,444, respectively. Lease agreements frequently include renewal options and require PEF to pay utilities, taxes, insurance and maintenance.

In accordance with accounting principles generally accepted in the United States of America, the leases have been recognized using the straight-line method resulting in a lease liability of \$265,633 and \$257,280 at March 31, 2022 and 2021, respectively.

On November 1, 2016, PEF entered into a standby letter of credit with a local financial institution in the amount of \$287,790. The letter of credit is to be used as a deposit relating to one of PEF's office leases and lists the landlord as the beneficiary. If an event of default occurs or if PEF fails to vacate the premises and surrender possession thereof in accordance with the terms of the lease upon expiration of the lease, then in either such event the landlord may present letter of credit to the financial institution for payment. In accordance with the terms of the lease, the letter of credit may be reduced at a future point in time. The standby letter of credit is included in Other Assets in the statement of financial position as of March 31, 2022 and 2021.

## **10. COMMITMENTS AND CONTINGENCIES (Continued)**

### **Litigation**

PEF has been named as a defendant in several lawsuits and claims. While the ultimate outcome of these actions cannot be predicted at this time, it is the opinion of management that the disposition of these lawsuits and claims will not have a material adverse effect on the financial position of PEF.

### **Health Insurance**

PEF provides health insurance benefits utilizing a self-funded plan that covers substantially all full-time employees. The liability for claims incurred and claims incurred but not reported was approximately \$75,000 for both the years ended March 31, 2022 and 2021.

PEF has purchased individual risk and excess risk stop-loss insurance to limit its exposure to claims in excess of specified amounts.

### **Supreme Court Ruling: Janus v. AFSCME**

The June 27, 2018 Supreme Court ruling that the application of public sector union fees to non-members is a violation of the First Amendment of the US Constitution, was anticipated by the Organization to pose risks to enrolling and retaining dues-paying members. Proactive membership engagement, budgetary allocations and policy measures undertaken prior to the ruling, and on-going initiatives continued to the present have largely mitigated adverse effects. The Organization remains vigilant to all such threats.

### **SEIU Obligation**

As part of the Organization's agreement with the Service Employees International Union (SEIU), PEF is obligated to contribute an amount equivalent to at least \$6.00 per member per year to support the overall SEIU political education and action program. If the Organization does not meet its annual fundraising obligation, it may be required to fund the deficiency plus an amount determined by the International Executive Board of SEIU. An agreement was reached between PEF and SEIU that removes PEF's obligation and penalty from prior years while PEF commits to reaching its annual COPE obligation by the end of 2022. The Organization does not believe that any financial settlement would be material.

### **Global Health Emergency**

The United States is presently in the midst of a national health emergency related to a virus, commonly known as Novel Coronavirus (COVID 19). The overall consequences of COVID 19 on a national, regional and local level are unknown, but it has the potential to result in a significant economic impact. The future impact of this situation on the Organization and its results and financial position is not presently determinable.

## **11. RELATED ORGANIZATIONS**

PEF is affiliated with the following:

### **Public Employees Federation Membership Benefits Program (The Program)**

The Program was established to provide PEF members the opportunity to obtain various insurance and other benefits at group rates. The Program is outside the operations of PEF and is not included within the accompanying consolidated financial statements. PEF is not responsible for the debts of the Program and any remaining assets upon termination of the Program revert to the participating members and not to PEF.

## 11. RELATED ORGANIZATIONS (Continued)

### Public Employees Federation Membership Benefits Program (Continued)

PEF incurs costs on behalf of the Program, which are billed to the Program. Included in other receivables at March 31, 2022 and 2021, are receivables from the Program of \$912,660 and \$538,742, respectively. Included in accounts payable at March 31, 2022 and 2021 are amounts due from PEF to the Program of \$17,393 and \$0, respectively.

### Retirees' Fund

The Retirees' Fund was established to provide various services, such as continuing insurance and seminars, to retired PEF members. This fund is outside the operations and control of PEF and is not included within the accompanying consolidated financial statements. PEF incurs various costs for payroll, benefits and office expenses on behalf of the Retirees' Fund, which it bills to the Retirees' Fund. Included in other receivables at March 31, 2022 and 2021 are receivables from the Retirees' Fund for \$71,404 and \$24,175, respectively. Included in accounts payable at March 31, 2022 and 2021 are amounts due from PEF to the Retirees' Fund of \$4,230 and \$0, respectively.

### PEF Relief Fund

The PEF Relief Fund was established to provide contributions to members who are in need of assistance due to the occurrence of natural or manmade disasters. This fund is outside the operations and control of PEF and is not included within the accompanying financial statements. Included in other receivables at March 31, 2022 and 2021 are receivables from the PEF Relief Fund for \$81,956 and \$79,956, respectively.

## 12. FAIR VALUE MEASUREMENT

FASB ASC 820, *Fair Value Measurements and Disclosures* establishes a common definition for fair value to be applied to U.S. GAAP requiring use of fair value, establishes a framework for measuring fair value, and requires disclosure about such fair value measurements. FASB ASC 820 defines fair value as the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date (exit price). FASB ASC 820 classifies the inputs used to measure fair value into the following hierarchy:

Level 1: Unadjusted quoted prices in active markets for identical assets or liabilities.

Level 2: Unadjusted quoted prices in active markets for similar assets or liabilities, or unadjusted quoted prices for identical or similar assets or liabilities in markets that are not active, or inputs that are derived principally from or corroborated by observable market data by correlation or other means, or inputs other than quoted prices that are observable for the asset or liability. Level

3: Unobservable inputs for the asset or liability based on the Company's own assumptions. The methods described above may produce a fair value estimate that may not be indicative of net realizable value or reflective of future fair values. Furthermore, while PEF believes its valuation methodologies are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different fair value measurement at the reporting date. During the years ended March 31, 2022 and 2021, there were no changes in the valuation methodologies used to determine fair value.



## 12. FAIR VALUE MEASUREMENT (Continued)

Fair values of assets measured on a recurring basis at March 31, 2022 are as follows:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
U.S Treasury notes and bills	\$ -	\$ 8,982,694	\$ -	\$ 8,982,694
GNMA pass-thru securities	-	42,251	-	42,251
Equity securities	4,313,609	-	-	4,313,609
Corporate bonds	-	134,442	-	134,442
	<u>-</u>	<u>134,442</u>	<u>-</u>	<u>134,442</u>
Total assets at fair value	<u>\$ 4,313,609</u>	<u>\$ 9,159,387</u>	<u>\$ -</u>	<u>\$ 13,472,996</u>

Fair values of assets measured on a recurring basis at **March 31, 2021** are as follows:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
U.S Treasury notes and bills	\$ -	\$ 7,788,869	\$ -	\$ 7,788,869
GNMA pass-thru securities	-	55,683	-	55,683
Equity securities	4,181,231	-	-	4,181,231
Corporate Bonds	-	191,201	-	191,201
	<u>-</u>	<u>191,201</u>	<u>-</u>	<u>191,201</u>
Total assets at fair value	<u>\$ 4,181,231</u>	<u>\$ 8,035,753</u>	<u>\$ -</u>	<u>\$ 12,216,984</u>

## 13. SUBSEQUENT EVENTS

Subsequent events have been evaluated through August 23, 2022, which is the date these consolidated financial statements were available to be issued.

**CONSOLIDATING STATEMENT OF FINANCIAL POSITION**  
**MARCH 31, 2022**

	2022			
	New York State Public Employees Federation	PEF Land Holding Corporation	Eliminations	Consolidated
<b>ASSETS</b>				
CURRENT ASSETS:				
Cash and cash equivalents	\$ 9,307,479	\$ -	\$ -	\$ 9,307,479
Investments	13,472,996	-	-	13,472,996
Membership dues receivable, net	308,804	-	-	308,804
Due from related parties and other receivables	2,353,732	-	-	2,353,732
Prepaid expenses	547,881	-	-	547,881
Total current assets	25,990,892	-	-	25,990,892
PROPERTY AND EQUIPMENT, NET	4,738,403	166,789	-	4,905,192
OTHER ASSETS:				
Investment in PEF Land Holding Corporation	166,789	-	(166,789)	-
Restricted cash	89,636	-	-	89,636
Deposits	322,424	-	-	322,424
Total other assets	578,849	-	(166,789)	412,060
Total assets	\$ 31,308,144	\$ 166,789	\$ (166,789)	\$ 31,308,144
<b>LIABILITIES AND NET ASSETS</b>				
CURRENT LIABILITIES:				
Accounts payable	655,531	-	-	655,531
Capital lease obligation, current portion	81,548	-	-	81,548
Employee organizational leave	350,000	-	-	350,000
Other accrued liabilities	1,464,171	-	-	1,464,171
Accrued vacation	1,021,285	-	-	1,021,285
Total current liabilities	3,572,535	-	-	3,572,535
LONG-TERM LIABILITIES:				
Capital lease obligation, net of current maturities	230,746	-	-	230,746
Accrued post-retirement benefits	12,293,906	-	-	12,293,906
Total long-term liabilities	12,524,652	-	-	12,524,652
Total liabilities	16,097,187	-	-	16,097,187
NET ASSETS WITHOUT DONOR RESTRICTIONS:				
Designated by board	7,420,334	-	-	7,420,334
Post-retirement costs recognized in net assets	459,354	-	-	459,354
Undesignated	7,241,633	166,789	(166,789)	7,241,633
Total net assets without donor restrictions	15,121,321	166,789	(166,789)	15,121,321
NET ASSETS WITH DONOR RESTRICTIONS	89,636	-	-	89,636
TOTAL NET ASSETS	15,210,957	166,789	(166,789)	15,210,957
Total liabilities and net assets	\$ 31,308,144	\$ 166,789	\$ (166,789)	\$ 31,308,144

The accompanying notes are an integral part of these schedules.

**CONSOLIDATING STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS  
FOR THE YEAR ENDED MARCH 31, 2022**

	2022			
	New York State Public Employees Federation	PEF Land Holding Corporation	Eliminations	Consolidated
CHANGES IN NET ASSETS WITHOUT DONOR RESTRICTIONS:				
REVENUE AND GAINS:				
Membership dues	\$ 38,609,753	\$ -	\$ -	\$ 38,609,753
Less:				
Divisional distributions	913,682	-	-	913,682
Per capita taxes, net	9,108,154	-	-	9,108,154
Affiliation dues	293,910	-	-	293,910
Net membership dues	28,294,007	-	-	28,294,007
OTHER SUPPORT:				
Interest and dividend income	210,167	-	-	210,167
Net unrealized and realized gains (losses)	(89,329)	-	-	(89,329)
Grant income	521,174	-	-	521,174
Advertising income, net	31,039	-	-	31,039
Rental income	-	141,814	(141,814)	-
Other income	1,050,922	-	-	1,050,922
Net income (loss) of subsidiary	(54)	-	54	-
Total other support	1,723,919	141,814	(141,760)	1,723,973
NET ASSETS RELEASED FROM RESTRICTIONS:				
Satisfaction of program restrictions	194,701	-	-	194,701
Total revenues, gains and other support	30,212,627	141,814	(141,760)	30,212,681
EXPENSES:				
Salary and benefit expenses	20,169,135	-	-	20,169,135
Staff travel and related expenses	530,040	-	-	530,040
Program related expenses	787,683	-	-	787,683
Operating expenses	5,058,089	123,874	(123,874)	5,058,089
Depreciation	471,994	54	-	472,048
Interest expense	-	17,940	(17,940)	-
Total expenses	27,016,941	141,868	(141,814)	27,016,995
CHANGE IN NET ASSETS WITHOUT DONOR RESTRICTIONS BEFORE OTHER CHANGES IN NET ASSETS WITHOUT DONOR RESTRICTIONS	3,195,686	(54)	54	3,195,686
OTHER CHANGES IN NET ASSETS:				
Post-retirement charges other than net periodic benefit costs	538,213	-	-	538,213
TOTAL CHANGE IN NET ASSETS WITHOUT DONOR RESTRICTIONS	3,733,899	(54)	54	3,733,899
CHANGES IN NET ASSETS WITH DONOR RESTRICTIONS				
Contributions	182,870	-	-	182,870
Net assets released from restrictions	(194,701)	-	-	(194,701)
TOTAL CHANGES IN NET ASSETS WITH DONOR RESTRICTIONS	(11,831)	-	-	(11,831)
TOTAL CHANGE IN NET ASSETS	3,722,068	(54)	54	3,722,068
NET ASSETS - beginning of year	11,488,889	166,843	(166,843)	11,488,889
NET ASSETS - end of year	\$ 15,210,957	\$ 166,789	\$ (166,789)	\$ 15,210,957

**CONSOLIDATED SCHEDULE OF EXPENSES  
FOR THE YEARS ENDED MARCH 31, 2022 AND 2021**


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	<u>2022</u>	<u>2021</u>
<b>SALARY AND BENEFIT EXPENSES:</b>		
Salaries	\$ 11,459,500	\$ 10,959,291
Health insurance	4,319,650	3,663,525
Pension expense	2,266,121	2,150,264
Payroll taxes	955,407	956,641
Union leave	555,465	508,249
401(k) plan	393,767	374,290
Term life insurance	118,227	114,904
Long-term disability	49,062	47,374
Dependent care	51,936	43,989
Tuition reimbursement	<u>-</u>	<u>6,515</u>
Total salary and benefit expenses	<u>\$ 20,169,135</u>	<u>\$ 18,825,042</u>
<b>STAFF TRAVEL AND RELATED BENEFITS:</b>		
Automobile expense	\$ 272,920	\$ 250,588
Staff travel	<u>257,120</u>	<u>93,503</u>
Total staff travel and related benefits	<u>\$ 530,040</u>	<u>\$ 344,091</u>
<b>PROGRAM RELATED EXPENSES:</b>		
Employee organizational leave	\$ (427,667)	\$ 530,628
Program related travel	<u>1,215,350</u>	<u>122,866</u>
Total program related expenses	<u>\$ 787,683</u>	<u>\$ 653,494</u>

The accompanying notes are an integral part of these schedules.



**CONSOLIDATED STATEMENTS OF OPERATING EXPENSES  
FOR THE YEARS ENDED MARCH 31, 2022 AND 2021**


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	<u>2022</u>	<u>2021</u>
OPERATING EXPENSES:		
Office rent and parking	\$ 1,106,332	\$ 1,115,444
Professional and consultant fees	1,075,663	654,309
Advertising	568,807	467,750
Computer fees	315,714	81,182
Arbitration	212,941	140,935
Telephone and communications	208,149	198,999
COPE expense	194,701	180,795
Postage	169,294	71,780
Insurance	154,632	175,462
Printing	151,999	53,375
Office supplies	136,379	86,482
Political and associated contributions	122,535	274,490
Books and reference material	99,004	109,283
Utilities	92,684	83,625
Janitorial	91,051	32,378
Maintenance and repairs	68,167	136,448
Minor equipment purchases	63,522	57,378
Outside temporary hires	58,955	-
Scholarships	45,200	45,250
Steno and transcript fees	31,078	42,230
Reproduction	13,810	34,610
Charitable and other contributions	10,883	250,974
Real estate taxes	7,807	6,506
Photographic supplies	825	-
Equipment rental	-	510
Miscellaneous	<u>57,957</u>	<u>53,493</u>
 Total operating expenses	 <u>\$ 5,058,089</u>	 <u>\$ 4,353,688</u>

The accompanying notes are an integral part of these schedules.

# Proposed Constitutional Amendment

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The following proposed amendment to Article VI(G)(1) and the first paragraph of Article XV of the PEF Constitution will be presented for ratification to delegates at the 2022 PEF Convention. The amendment was approved by the PEF Executive Board at its June 9 and 10, 2022 meeting for presentation to the Delegates. The amendment would remove obsolete language.

*(Underlined text would be added and text in brackets would be deleted):*

## Article VI(G)(1)

1. [I]Ensure that services are satisfactorily provided to all members [and fee payers] in the region he/she serves;

## Article XV

PEF shall finance its operations by the receipt of membership dues [and agency fees] as provided by New York State law.



# Proposed Constitutional Amendment

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The following proposed amendment to Article XII of the PEF Constitution will be presented for ratification to delegates at the 2022 PEF Convention. The amendment was approved by the PEF Executive Board at its June 9 and 10, 2022 meeting for presentation to the Delegates. The proposal would amend Article XII, Recall, of the PEF Constitution by changing from the current recall standard of removal by popular demand to removal with cause.

*(Underlined text would be added):*

## Article XII RECALL

A petition signed by 60% of the regular membership in any constituency, which requests the removal of that constituency's officer or representative, shall remove that person from office, with cause and upon certification of the petition by the Secretary-Treasurer; provided, however, that should the Secretary-Treasurer be the subject of the recall, the President shall provide such certification. A vacancy which occurs as a result of a recall shall be filled pursuant to Article X, above.



## Ailing members need your leave donations

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The following PEF members have reported a need for leave donations due to the need for medical treatment or recuperation from illness or injury.

Donations are made from annual leave and donors must retain at least 10 days of annual leave after donating. To donate leave, obtain a leave-donation form from your personnel or human resources office and submit it to that office. You may donate leave to employees at both the agency where you work and to those working at other state agencies.

To help facilitate donations, we list an HR contact number for each person needing donations on the list below.

- Linda Agyemang is a nurse 2 (psychiatric) at Fishkill Correctional Facility in Beacon.
- LaShon Boyd is an habilitation specialist 1 at the Metro Developmental Disabilities Services Office in Manhattan.
- Sally Fontana is social work supervisor 1, LCSW at Mohawk Valley Psychiatric Center in Utica.
- Leanne Graf is a teaching and research center nurse 2 at Upstate Medical Center in Syracuse.
- Cherie Griffin is a taxpayer services specialist 2 at the state Department of Taxation and Finance in Albany.
- Drina Holden is a senior certification analyst at the state Department of Economic Development in Manhattan.
- Christy Jaromack is a public information specialist 1 at the state Department of Environmental Conservation in Albany.
- Monica Kehagias-Gordon is an intensive case manager at Buffalo Psychiatric Center.
- Maria Lisanti is an intensive case manager at Bronx Psychiatric Center.
- Sharon Lynch is a parole officer in Jamaica Queens.
- Margaret Mendez is a motor vehicle referee at the state Department of Motor Vehicles in Brooklyn.
- Roxeen Mundy is an information technology specialist 2 at the state Office of Information Technology Services in Albany.
- John Reed is licensed master social worker 2 at Rockland Children's Psychiatric Center in Saugerties.
- Darlene (Gemma) Rose is an employment counselor for the state Labor Department in Amsterdam.
- Kyle Tomlin is a supervising offender rehabilitation coordinator at Ulster Correctional Facility in Napanoch.
- Laquita White is a real estate specialist 1 at the state Transportation Department in Buffalo.

The rules for making and receiving leave donations (such as leave recipients may not have had any disciplinary actions or unsatisfactory performance evaluations within their last three years of state employment) are set forth on pages 189 and 190 of the 2019-23 PS&T Contract. If you, or a PEF member you know, need leave donations because of a medical issue, you may contact The Communicator to request publication of that need. Send requests to [thecomunicator@pef.org](mailto:thecomunicator@pef.org), or call 518 396-8201. Be sure to provide your contact information.



# Votes matter and the Inflation Reduction Act will help workers, retirees and their families

The federal Inflation Reduction Act (IRA) was just signed into law. This legislation is good for our retirees and for our union! It is very appropriate that it was enacted just before Labor Day!

I would like to echo PEF President Wayne Spence's [message](#) in the July/August Communicator. Happy belated Labor Day. I hope you were able to walk in a parade or attend a labor-sponsored event.

Remember that unions build the middle class, and corporate greed is working to minimize unions' influence, and that elections have consequences both positive and negative. The IRA is a positive consequence of the 2020 presidential election. Here are some facts about the IRA from our friends at The Alliance for Retired Americans:

- The IRA that recently passed by Congress and was signed into law by President Joseph Biden will address working family and retiree issues by lowering prescription drug prices, health insurance and home energy (costs).
- It will tackle the climate crisis at a level never before attempted.
- It is fully paid for, and will not cost one cent more in taxes for anyone making less than \$400,000 a year.
- It will reduce the deficit by at least \$300 billion over 10 years according to the Congressional Budget Office.

The IRA will lower prescription drug prices by allowing Medicare to negotiate for lower prices. It will penalize drug corporations if they raise prices faster than the inflation rate for people getting Medicare. It will cap Medicare part D drug costs at \$2,000 and insulin costs for Medicare recipients at \$35 per month.

Originally the bill would have capped insulin costs for everyone, but since this was a reconciliation bill and under the rules of reconciliation costs to private consumers were not a budget item, Republicans in the Senate removed the cap on insulin for everyone and the bill passed while only controlling insulin costs for Medicare recipients. It expands Medicare benefits to include free vaccines. The law will help 13 million Americans maintain health coverage under the Affordable Care Act through 2025, saving them an average of \$800 per year.

The legislation also makes historic investments in clean energy that can cut household energy costs by up to \$1,000 per year, address the climate change issue and create up to 900,000 jobs a year for the next decade.

The IRA is fully paid for by requiring that large profitable corporations pay at least a minimum 15% tax rate. In 2020, 55 of America's largest and wealthiest corporations paid \$0 in income taxes. Now, corporations will also pay a 1% tax on stock buybacks. Additionally, the IRS will get a boost in funding so it can go after tax cheats who already owe taxes. This funding boost also will allow the IRS to expand customer service centers that help taxpayers wanting to get their tax refund on time or their phone calls answered promptly.

Under this bill there are no new federal income taxes on anyone making less than \$400,000 per year. This bill is good for seniors, unions, workers, the deficits, the environment and the economy! I applaud the work that New York's Senator Chuck Schumer did as senate majority leader to make this happen in spite of very intense opposition from the GOP. Not even one Republican voted for this plan.

Remember that in November -- because your vote matters!





# Letters to the Editor

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## When are 2023 scholarship applications due?

**To the Editor:** Just checking on eligibility for a 2023 graduate, when can he apply for scholarship consideration?

**DIANE BAKER**  
East Greenbush

**Editor's Note:** The Communicator publishes information about union scholarships in its December and January combined issue. Information also is available on the PEF website at <https://www.pef.org/about/scholarships/>. Since some PEF regions and PEF divisions offer scholarships, you may want to contact your division and regional leaders to ask about their deadlines.

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## Where's my health care bonus?

**To the Editor:** COVID pay for people who worked and were never out (during the COVID lockdown) was promised by Gov. Hochul to state health care workers. I do not see any action on it!

**VIRGINIA ELLER**  
Tonawanda

**Editor's note:** Since late 2020, PEF was the only prominent New York State union advocating for COVID-19 hazard pay for all essential workers. While the governor chose, instead, to offer a \$3,000 "Healthcare Workforce Bonus" in her 2022-23 budget, we were able to expand the program's eligibility to include members at all agencies who provided front-facing care for patients during the pandemic. [Eligible members will be notified directly by their agencies about when they will receive that bonus.](#) PEF will continue pushing for hazard pay for all members who supported the state's pandemic response.

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## Inflation crushing retirees' pensions

**To the Editor:** Please try to have our pension increased as the inflation is very high now.

ELSIE GEORGE

**Editor's note:** PEF recognizes the pressure that inflation is putting on its retired members surviving on what are essentially fixed incomes. However, state law forbids the union from negotiating on behalf of its retired members. What PEF and PEF Retirees are educating state legislators and leaders about this hardship and encouraging them to find ways to alleviate it.





## Dentists should receive geographic pay

**To the Editor:** Please grant geographic pay to dentists. We feel disrespected and disenfranchised because for years only MDs, RNs, LPNs, NPs and pharmacists have received it. Why? We took eight years of schooling, took our board exams, passed and have our degrees. Please give this serious consideration.

**Dr. EXCELSA SERABIAN**

Massena

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## Raise pension COLAs or strike!

**To the Editor:** What can PEF do for NYS retirees? How about a 50% lump sum payment from NYS to make up for the decades of false COLAs (cost of living adjustments), and then increase this year's COLA to the real inflation rate? Or go on a statewide strike if the state refuses to do Justice.

**MIKE SEGUIN**

Buffalo

**Editor's note:** Under state law, the union is not allowed to negotiate on behalf of its retired members. State labor law also forbids the union from striking. PEF and PEF Retirees are educating state legislators and leaders about this hardship and encouraging them to find ways to alleviate it.



**PEF is now  
on Instagram!  
Follow us today  
@nyspef**



## August 31, 2022

Freddie Keiffer, the son of PEF member Suzanne Keiffer (DOT) throws out the first pitch at a Tri-City ValleyCats game on Aug. 31, 2022. Freddie won a raffle conducted by PEF Region 8 to throw out the first pitch as part of the team's early "Not-So-Scary Halloween" game at the Troy, N.Y., ballpark.



## August 26, 2022

PEF represented at the Republican Assembly Campaign Committee event at Watkins Glen. Left to right in the photo: Region 2 nurse Jennifer Bradt, Region 2 Coordinator Shelby Wisneski, Region 3 Coordinator Leisa Abraham, VP Randi DiAntonio and Elmira parole officer Dan Kress.





**August 19, 2022**

PEF members at the NYS Veterans Home in Batavia were welcomed to work with coffee, donuts and union updates!



August 30, 2022

Scenes from the weekend at the Great New York State Fair!







