

Vol. 43

The COMMUNICATOR

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Celebrating Solidarity!

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The Communicator Staff

Rob Merrill Managing Editor
Curtis Canham Graphic Artist
Kate Stickles Reporter/Editor
Najee Walker Reporter/Writer
Lauryl Schrom Junior Graphic Artist
Kristina Willbrant Comm Coordinator
Kaitlin Sheehan Digital Communications
Specialist

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Radhakrishna

PEF Regional Field Offices

Region 1 Buffalo 1-800-462-1462
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Region 3 Rochester 1-800-724-5003
Region 4 Syracuse 1-800-724-5004
Region 5 Binghamton 1-800-724-4998
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The President's Message

By WAYNE SPENCE



Gearing up for fights this Fall!

Labor Day has come and gone, the kids are back in school, and even the leaves are starting to change. While all those things contribute to a sense of normalcy this time of year, things are far from normal when it comes to the labor movement in this country. The current administration is doing everything in their power to weaken workers' rights – from drastic federal funding cuts that will impact State budgets in a variety of ways, to union-busting on the federal level, to anti-union appointments on the National Labor Relations Board.

Our response must be to stay Union Strong and demonstrate a united front to fight back against policies that strip away the hard-fought workers' rights and protections we've earned over the years. That's why I was so glad to see such an amazing turnout across the State at [Labor Day parades and picnics](#). I marched on Sept. 6 in the annual New York City Central Labor Council Parade with about 200 PEF members and tens of thousands of our union siblings. It's that kind of solidarity and energy that will help us through these difficult times.

Our top priority through the end of the year and in early 2026 will be at the bargaining table, where the Contract Team will begin negotiating with the State for a successor contract. The current CBA for our Professional, Scientific and Technical unit expires April 2, 2026. As you'll read in this issue, we have successfully negotiated the [elimination of various sunset provisions](#) to protect hard-won contractual gains. But as the team continues to train for the upcoming negotiation, they need your support. Please take our [Contract Survey](#) if you have not already. This union's mission is to represent you when it comes to the terms and conditions of your employment, so tell us what you value and what you want us to fight for.

Elsewhere in this issue you'll find some amazing stories of the work PEF members do – from [inspecting bee colonies](#) all across the State, to distributing [arts and cultural grants](#), to [fighting wildfires](#) wherever they ignite. I've said it a thousand times, but I mean it every time – I'm proud to be the union president of such a dedicated, diverse, and professional workforce.

In Unity,

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

Wayne Spence
PEF President



PEF members turn out for Labor Day celebrations statewide

PEF members marked Labor Day with solidarity and community spirit across New York State, attending several Labor Day parades and picnics to stand shoulder-to-shoulder with allies in the labor movement, and remind New Yorkers of the essential work they do every day.

In **Region 1**, members joined the Western New York Area Labor Federation and other union members in Buffalo for the annual parade, followed by a cookout in Cazenovia Park.



Nearly 85 members carrying signs that said, “Don’t Cut Public Services”, “Standing Up for All Workers” and “Public Services Make America Great!” marched in **Region 3’s** Rochester Labor Day Parade. Several politicians joined the hundreds of union members and families from dozens of affiliates of the Rochester Labor Council, including Assemblymembers Harry Bronson, Josh Jensen, Jen Lunsford and Demond Meeks, as well as State Senator Samra Brouk.



At the New York State Fair in Syracuse, members in **Region 4** enjoyed family games, face painting, food and fun before hundreds of participants from multiple unions, including 1199, CSEA, IBEU, SEIU, Stagehands Local 9, and UUP, marched around the fairgrounds. U.S. Rep. John Mannion, along with State Senator Chris Ryan and Assemblyman Al Stirpe were among the nearly 400 marchers.



In Massena, about 80 **Region 7** members turned out for the annual Solidarity Parade, which attracted more than 1,100 union siblings and their families, including AFGE Local 1968, CSEA, IBEW, SEIU 1199, the Teamsters and UUP. State Senator Dan Stec and Plattsburgh Town Supervisor Michael Cashman (who's running for State Assembly) marched alongside the unions. After the parade, participants enjoyed a free picnic in Springs Park with food and family fun.

VIDEO FROM WWNY-TV: [Massena celebrates organized labor, workers' rights with annual Solidarity Parade](#)



At the Michael L. Burns Labor Day Celebration in the Capital Region (PEF **Region 8**), sponsored by the Capital District Area Labor Federation, members turned out in force for the free annual event, joined by U.S. Sen. Kirsten Gillibrand, U.S. Rep. Paul D. Tonko, Assemblymember John McDonald, Assemblymember Gabriella A. Romero, State Senator Patricia A. Fahy, Albany Co. Legislator Dustin Reidy, and Albany Mayoral Candidate Dorsey Applrys. A press event was held prior to the cookout, with union members and legislators speaking out against federal cuts and the impact they will have on State services.

VIDEO FROM WRGB-TV: [NY officials join union workers in national 'Workers Over Billionaires' day of action](#)



The New York City Central Labor Council Parade took place on its traditional date, the Saturday after the holiday. PEF President Wayne Spence and Vice President Darlene Williams were joined on Sept. 6 by the PEF Regional Coordinators from **Regions 9-12** and about 200 members for the route from East 46th Street up 5th Avenue to Central Park. PEF members rode on and marched alongside a custom float urging New York State to “Fund Our Future” and “Invest in the Public Workforce.” Along the way, U.S. Senator Chuck Schumer and various State lawmakers thanked PEF members for the work they do.





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Negotiated end to sunsets keeps benefits active even after contract expiration

By KATE STICKLES



The current PS&T Contract with New York State runs through April 1, 2026.

PEF's Contract Team is deep into training and preparations for a successor contract, positioning the union strongly for what may be challenging negotiations as the state braces for the impact of federal budget cuts. In the last round of bargaining, the team secured major wins by ending "sunsets" on several provisions that once expired with the contract.

While important benefits such as health insurance, performance advances, location pay, on-call pay, and hazardous duty pay, have historically been protected, other benefits and monies need to be extended by mutual agreement, or they expire at the end of each contract term.

Funding for joint labor-management committees (i.e., health benefits, professional development, health and safety, and career mobility), longevities for newly eligible employees, and the

Productivity Enhancement Program (PEP) are now among the benefits protected. The fact that joint committee funding continues after contract expiration is important as it means that highly utilized programs such as tuition reimbursement, license renewal reimbursement and contributions to Dependent Care Accounts will not be interrupted.

PEF fought hard to make sure these benefits would no longer be at risk of termination.

"Thanks to gains in the 2023–2026 Agreement, these benefits will now stay in place until a new contract is reached," said Contract Team Chair and PEF Vice President Darlene Williams. "Ending sunsets takes away a bargaining chip the state has used to push for givebacks. Protecting funding for joint committees — especially tuition reimbursement and professional development — means millions of dollars for our members' growth and advancement. That's a major victory for PEF."

Some provisions do still sunset, including the Higher Education Differential, which provided \$600 payments in FY 2024–25 and 2025–26 for members with degrees or State Education Department-issued licenses, and a pilot expedited suspension review program.

"These benefits are essential to recruiting and retaining the skilled professionals New York relies on," said VP Williams. "The Higher Education Differential rightly recognizes our members as highly trained public servants, and ensuring this recognition continues will be a top priority in the next round of negotiations."

As the team prepares to go to the table, the union is seeking input from members on their priorities. Please take a few minutes to fill out the [contract survey on the PEF website](#).



PEF steps up for nurse who was attacked on the job

By **NAJEE WALKER**

"I come to work to do my job. I don't come to get hurt or attacked."

Those words from Rachelle Charles, a registered nurse at Pilgrim Psychiatric Center, express a sentiment shared by everyone who works for New York State. But all too often, PEF members are reporting incidents of workplace violence, harassment, and unsafe conditions on the job.

"At that moment, you're not even thinking," said Charles, who was attacked by a patient on May 3, 2025. "He came in, barged his way into the med room and started attacking me unprovoked."

Charles was in the middle of helping him and other patients when the attack happened. She described the attacker to the police as tall and heavyset. He's listed on the police report at 6'2", 320 pounds. He was shouting, she said, and as she tried to de-escalate, he shoved a medical cart at her and began striking her while she ducked and covered her head.

At first, Charles did not want to press charges against the patient. Eventually, after speaking with other PEF members, she changed her mind.

"I decided to press charges because I didn't want them to put me back on the ward with him," she said. "I was scared for my life. I didn't want him to attack me again."

After taking some time to recover and receive physical therapy for injuries to her right arm and back, Charles made the trip to the Suffolk County Police Station to file her report on May 28. But she did not go alone. PEF Vice President Darlene Williams, PEF Region 12 Coordinator Corinne Testa, Field Representative Andrew Greco, and other PEF members accompanied her.

"They were all very supportive and I was glad to have them there with me, but the police seemed annoyed that the union was with me," said Charles. "I spoke to an officer alone, but it seemed like he was trying to deflect the situation. At some point, I requested that there be a PEF representative present before I continue the conversation."

Charles said she was already nervous about talking to the police and filing the report and the dismissive nature of the first officer did not help. Eventually, the police allowed a union representative to be present while Charles delivered her report.

"As a victim, I was made to feel as though being assaulted and harassed was simply part of the job—an unfortunate and unacceptable implication for anyone working in a psychiatric facility like Pilgrim," said Charles.



It was PEF's involvement and willingness to stand with Charles that made her feel safe and supported.

"They had my back, and I was happy they were there to witness what I witnessed," said Charles.

Since visiting the precinct, PEF has worked with the Office of Mental Health (OMH) and local law enforcement. PEF President Wayne Spence engaged with the inspector and deputy inspector from the Third Precinct in Suffolk County. Previously, police would not respond to incidents at Pilgrim Psychiatric Center due to an assumption that safety officers on site would act as "first responders." Following discussions with PEF, the precinct will now respond to violent incidents at Pilgrim when they are reported.

"Our members are not only workers — they are citizens of Suffolk County and the State of New York," said Vice President Williams. "They deserve the full protection of local law enforcement, just like anyone else. This development is a major step forward in ensuring their safety, respect, and legal rights."

For Charles, though she is grateful for the work done by PEF and the support of co-workers and fellow members, she hopes to see a change within OMH and how agency leaders support their nurses.

"I want to see supervisors be more supportive of staff if this happens again. We shouldn't have to work in fear," said Charles. "OMH needs to be better at staffing and better at providing safety for the staff. This doesn't have to keep happening."



PEF members from the NYSCA pose for photo after staff meeting.

Members at Council of the Arts uplift culture in New York State

By NAJEE WALKER

New Yorkers and visitors to the state may know of the Buffalo Philharmonic Chorus, Proctor's Theatre in Schenectady, Lincoln Center for the Performing Arts in New York City, maybe even the Bronx Museum of the Arts. What they may not know is that all these organizations and thousands of others, are funded, at least in part, by the New York State Council of the Arts (NYSCA).

NYSCA was founded and established in 1960 through a bill introduced by then State Senator MacNeil Mitchell, with the support of Governor Nelson Rockefeller. At the time, it was the first state arts agency established in the United States. Since then, the agency has supported thousands of artists, musicians and other arts and culture organizations in all state counties through direct and regrant funding. Grants from NYSCA can cover anything from direct project support for artists and organizations, to facility maintenance.

Orin Chait is a Program Officer for support of artists and theater. He is also the council leader for PEF Division 364. Chait and his fellow PEF members develop grant opportunities for artists who work in film, media, new technology, theater and interdisciplinary work.

Chait works with artists and organizations looking for grants and connect artists with needed resources. He also is involved with the grant peer panel review process.

"NYSCA wrote the book on Arts and Cultural funding in the United States," said Chait. "Our panel process is the first ever government concept of awarding funding for the arts."

Gabi Nail is also a program officer for NYSCA. She is the Secretary for PEF Division 364. Her work focuses on making sure that the grants process runs smoothly. She makes sure that contracts are created promptly and communicates with grantees and applicants.

"I also make sure that all the data is in the right place so that program directors have the right information and panelists have their applications ready for review," said Nail.

The process at NYSCA passes through many levels of review before grantees are awarded funds. Rita Putnam is another Program Officer

for NYSCA. She focuses on music and visual arts disciplines. She has been with the agency for 50 years and said when NYSCA was new things were very different.

"We did not have grant applications when I started," said Putnam. "A music group would just call us and ask for funding!"

Putnam is not alone at NYSCA in terms of longevity. It's a place where people stay because they love their work.

"I love the arts. I love what I do, and I built a career out of this," said Jerry Pecchia, an Arts Team Associate who started his career at the age of 17 in the mailroom and is now the Assistant Council Leader of Division 364, as well as Statewide Labor Management Chair and Health and Safety Chair. "People here love their jobs, and they know that they have a good union when they start, too. We are getting talented younger people into the agency and we're making sure they have a voice in the union."

Though some of the staff are new and institutional knowledge is imparted every day, Nail and other younger members are getting involved with the union.

"I'm still new to being Secretary, but I have been speaking with Jerry and Orin about how to get more involved," she said. "And I have been excited to take a more active role and get involved in PEF."

The agency only has about 30 employees in charge of serving all 62 New York counties. Most of the funding for NYSCA comes from State taxpayers, so during a time when federal funding for the arts is being clawed back across the country, NYSCA continues to operate mostly untouched.

"We thankfully remain operational even after the initial blow to the National Endowment for the Arts (NEA)," said Nail. "It is really reassuring and gratifying to know that we can continue to do our work and mobilize on behalf of the artists who are so passionate about their work."

New Yorkers, said Chait, should be proud of the work being done at NYSCA to make sure that the arts contribute to New York's economy.

"Our home state of New York is arguably one of the best places for arts and culture around the globe," he said. "Our legislators encourage and assist this vital quality of life, without limiting the freedom of artistic expression that is essential for the well-being of people."



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Apiary inspectors keep bee colonies healthy, protecting multi-million-dollar food industry

By KATE STICKLES

You might not think twice about shooing that bee away during your backyard barbecue, but did you know that bees are responsible for about 90% of the food we eat, through pollination? That fruit salad was made possible by bees.

"Honeybees, along with all pollinators, play a vital part in our ecosystem, not just locally, but globally," said Kristopher Stevens, a PEF member and apiary inspector with [the New York State Department of Agriculture and Markets](#). "Honeybees help to pollinate much of our landscapes in New York, creating biodiversity which in turn helps support other wildlife and their habitats."

Honeybees play a vital role in New York's agriculture economy. Each year, thousands of colonies throughout the state pollinate more than \$300 million worth of crops such as apples, watermelon, pumpkins, and other garden variety produce.

According to Ag and Markets, New York is home to more than 60,000 bee colonies, while additional colonies are shipped in from other regions of the country to make up the remainder.

Stevens relocated to New York in 1995 and became friends with a migratory commercial beekeeper, which launched him into what has now been two decades of working with bee colonies.

"After several hundred questions about what these insects were capable of doing, everything from communication skills to producing honey, wax, and propolis, and their ability to cross pollinate by use of static electricity to collect pollen, I chose the apiary inspection position because I could not get enough of the bees and the knowledge that came with it and I thoroughly enjoy the experience of meeting other beekeepers," he said.

As an apiary inspector, Stevens works with beekeepers in a 15-county area in central New York, ensuring the health of colonies and determining if beekeepers are in compliance with current state regulations.

He invited me to join him recently on one of his routine inspections and the work started immediately, looking for dead bees outside of colonies, an indicator of an unhealthy hive.

Surrounded by a steady stream of bees, Stevens used burlap smoke from a metal can to keep them calm as he opened a hive and explained the different parts - from where the queen resided and how she was kept inside, to the difference in male and female brood and the stages of honey production.

"If a colony is suspected of having a disease or pesticide exposure, we may collect samples to send for lab analysis," he said. "We also offer suggestions based on current research and best practices on how to mitigate diseases and maintain healthy colonies."

Apiary inspectors also collect data on the number of colonies and beekeepers across the state, especially important when dealing with diseases like [American Foulbrood](#), a destructive, worldwide bacterial disease that infects and kills larvae.

"Though the paperwork isn't as fun as opening the colonies, data collection is a valuable part of the job as this information is used to determine resource allocation for the department," Stevens said. "I recommend that all beekeepers register annually with the department and become a member of a local or statewide club, as well as get inspected. The inspectors have the resources at hand to help, if needed."

Ag and Markets also maintains a list of [swarm catchers](#) that provide bee removal services in New York, and a [beekeeper club directory](#).

Fun fact: There are bee colonies atop the Javits Center in New York City. Check out this [news feature](#) from CBS New York featuring Queens-based Astor Apiaries and master beekeeper Nick Hoefly.

"Happy, healthy colonies are more docile to work with, tend to produce more honey and their overwintering success is much higher," Stevens said.





State outlines expected payroll dates for delayed performance awards

PEF recently received information from the Office of the State Comptroller (OSC) about the payment of some delayed 2025 performance awards. OSC previously acknowledged that there were challenges in calculating years of qualifying service for the 2025 awards for employees with more complicated work histories, including those with prior hourly service, and therefore many members did not receive their awards in April or may have received an incorrect amount.

The 2025 performance awards are based on 12, 17, or 22 years of qualifying continuous service in the Executive Branch of New York state government, instead of years at top of grade.

According to OSC, the additional 2025 longevity payment dates are as follows:

- For employees with Legacy service prior to PayServ conversion (1998) and employees who were reinstated by the Civil Service Commission after their rehire date, the payment will be processed and paid in Institution Pay Period 11L, checks dated **Sept. 18, 2025**, and Administration Pay Period 12L, checks dated **Sept. 24, 2025**.
- For employees with qualifying Hourly and FEE service, the payment will be processed and paid in Administration Pay Period 16L, checks dated **Nov. 19, 2025**, and Institution Pay Period 16L, checks dated **Nov. 26, 2025**.

For employees with qualifying service over multiple records, payment will be processed in subsequent pay periods. This applies to employees who may have worked for more than one Executive Department agency.

Performance award payments for those with more straightforward work histories were made as anticipated in April 2025.

Members who do not receive a longevity payment to which they believe they are entitled, or who believe they received the wrong amount, should contact their PEF Field Representative. PEF Field Services advises members gather information about their prior Executive Branch work history such as appointment letters and payroll history. You must fill out a [release for payroll history requests](#), which needs to be notarized, according to these [instructions](#).

Some things to keep in mind about the 12, 17 or 22 years of qualifying service:

- Service in public schools, municipalities, New York State courts or Legislature, public benefit corporations or public authorities (other than Roswell Park) does not count.
- Executive Branch service in other units such as CSEA, NYSCOPBA or management/confidential does count.
- The service must be continuous as defined by Civil Service Law Section 130.3(c). Leaves of absence including workers' compensation and military leave do not constitute an interruption of service for this purpose, nor does a resignation followed by a reinstatement. So, for example, an employee with six years of service, then a one-year unpaid leave, and then another six years of service will have 12 years of continuous service, not 13. They do not have an interruption of continuous service, but the one year of unpaid leave does not count toward the total years of continuous service. Paid leaves and time spent on a workers' compensation leave will generally count toward the 12, 17 or 22 years of service.

PEF mobilizes in the face of Legionnaires' Disease outbreak in Harlem

By **NAJEE WALKER**

An outbreak of Legionnaires' disease was first detected on July 25 in the Central Harlem area of New York City. The New York City Health Department has been investigating the outbreak and found that the cluster of cases centered around zip codes 10027, 10030, 10035, 10037 and 10039. Since the initial detection, there have been 111 confirmed cases and six deaths. The NYC Health Department has traced the outbreak to 12 cooling towers at several buildings, mostly city-owned public buildings.

The response from agencies where PEF members may be at risk of contracting the disease at their place of work has been inadequate, according to PEF. At a meeting held at PEF's New York City office on Aug. 21 and via Zoom for members who couldn't attend, PEF Vice President Darlene Williams, along with Region 10 Coordinator Tamara Martin and other PEF leaders, detailed their efforts to keep PEF members safe.

"We have filed complaints with the New York Department of Health," said Martin. "We have been working with Field Representatives to make sure that agencies are responding to requests we have made for telecommuting, office closures, and other steps to keep PEF members safe."

The NYC Department of Health, Office of General Services (OGS), and other agencies have told workers that employees are "safe" or that the bacteria that causes Legionnaires' disease is "low" according to their testing of cooling towers. However, PEF members have not felt reassured taking them at their word.

"We want to see those test results from the Department of Health and from OGS and other agencies, because we want to know what 'low' means," said PEF Health and Safety Director Geraldine Stella.

State Senator Robert Jackson attended the Aug. 21 meeting via Zoom. He said that as the number of confirmed cases and deaths increase, it is unacceptable that PEF members are being kept in the dark about test results from and what they mean.

"The tests have already been done, supposedly," said Senator Jackson. "We want to see the results. We need to get to work on this and if the agencies or commissioners are not releasing those reports, we should go to Mayor Eric Adams and whoever is responsible for communicating with his commissioners."

Senator Jackson also said he would be working with other elected officials, including State Senator Cordell Cleare, who has constituents in Harlem as part of New York's 30th Senate District.

Some members are not only concerned for the safety of themselves and their co-workers, but also of families who are visiting buildings where the risk of disease may still be present. Erik Ruiz is the Council



PEF leaders and staff answer member questions on Aug. 21.

Leader for Division 245 and a Labor Services Representative at the Department of Labor. He said he worries for people who visit the career center located at 215 West 125th Street in Harlem.

"We had 191 people show up today and that includes older people, children and infants. I do not think they would have the best chances against this disease," said Ruiz. "I would be interested in having the building shut down temporarily not only for our members, but for the safety of all New Yorkers and their children."

While some telecommuting has been made available to employees working in the affected area, members feel the response has been inadequate so far since they are still being asked to work at locations where the disease may still be contracted. Tracy Peel, council leader of PEF Division 285 at the Workers' Compensation Board, said that it isn't enough to be given a few telecommuting opportunities while so little information is being provided about the possibility of disease.

"Most of our hearings are remote, but we did still have people come into the office for other services with the board during this period of time," said Peel. "We did receive an initial test result from April and July for our location, but right after we received that, we learned we weren't one of the buildings that tested positive for Legionella."

Peel said that despite not testing positive, the building has had problems with maintenance before and has been cited for issues several times. She worries that there may still be a presence of bacteria in the cooling towers.



Some members and elected leaders attended via Zoom.

"Why is the state just taking the word of the city without showing that it's verified? Members of the public are being put at risk," said Peel. "If they can produce the test, then produce the tests and show us we're fine. But if they can't, why aren't they doing other things that are absolutely within their capacity?"

While PEF works with legislators and other officials to find new avenues to keep members safe, PEF Health and Safety, working with Field Representatives and Regional Coordinators, have filed PESH complaints with the offices where Legionella has been found.

"The more information we get from leaders and members, the better we can bring that information to the proper authorities," said Stella. "Also, if you know of anyone who was diagnosed, we know that there is a likelihood that the exposure is work-related. We want to make sure we can get them the information they need to pursue their rights under the workers' compensation law and our contract."

PEF Health and Safety also advise going to the doctor if members are feeling sick and advising the treatment provider that they work in the Central Harlem area. That should trigger a test to see if Legionella bacteria is present.

"In terms of symptoms, it may seem like a summer cold or flu, with difficulty breathing, high temperature, or a cough," said Health and Safety Trainer Micheal Marquez. "I would advise everyone to seek medical treatment, do not delay, do not shrug it off as a summertime cold. It may be something more serious."

According to Health and Safety, the bacteria can stay in the system for weeks or even longer, depending on how quickly the body deals with the illness. Having documented tests and results from a doctor could benefit anyone seeking workers' compensation as well.

Vice President Williams ended the meeting with some words of wisdom regarding members' health.

"If you feel sick, go to a doctor, if you do not feel safe drinking the water, bring in bottled water, if you feel you need to wear a mask, do that," she said. "And I'm saying this even if there wasn't a Legionella outbreak in Harlem."



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DEC forester helps fight Colorado fires

By KATE STICKLES

When lightning strikes started wildfires in San Juan National Forest in Pagosa Springs, Colorado, at the beginning of August, New York wildland firefighters were first on the scene, including PEF member James Canevari.

Canevari, a forester in the Division of Fish and Wildlife at the Department of Environmental Conservation's Region 6 headquarters in Watertown, was deployed for two weeks as part of a team of 10 wildland firefighters led by DEC forest rangers.

"Our role was to patrol the district during a period of dry lightning storm conditions," Canevari said. "Many small fires ignited by lightning strikes were suppressed by our 10-person suppression module as well as other crews and modules stationed at the same location. My main role on the crew was as a chainsaw operator."

This isn't Canevari's first deployment. He has traveled from Nebraska to Alaska and many other western states over the last 17 years to help fight wildland fires, both as a forest service volunteer and as a DEC employee.

Aid from other states is crucial to the success of suppressing wildland fires.

"Cooperation is essential in emergency situations because if resources are depleted nationally and then fire activity gets extreme, we come in to attack the problem," Canevari said. "Also, collaboration and working together builds a bigger toolbox for all of us to access. We share ideas and techniques used to tackle problems during wildfires, and what we learn in hotter and drier conditions, in lands that see frequent fire, we can bring back to the east. Those lessons and tactics help shape our own attacks on eastern fires."

PEF members Kenneth Binder and Timothy Yeatts were also on the fire crew at Pagosa Springs.

"It's an arduous job, but very rewarding," Canevari said. "People appreciate and respect you and what you offer them – support and the willingness to step in harm's way to make sure measures are taken to protect them and their homes."



Gov. Kathy Hochul praised the firefighters for their efforts.

"New York is always ready to lend a hand when other states need our help," she stated in a [press release](#). "We're fortunate to have some of the best trained wildland firefighters in the country, so when there's trouble out west, New York's wildland firefighters are ready to jump into action, and I am so pleased to welcome them back safely."

On average the state deploys one or two crews every year to help fight fires out west.



Children, their parents and employees of Division of Criminal Justice Services participate in fingerprinting, poster creating, and other activities during Take Your Child to Work Day event.

Take Your Child to Work Day returns to NYS Division of Criminal Justice Services

By **NAJEE WALKER**

The work done at the Division of Criminal Justice Services (DCJS) focuses on keeping New Yorkers safe and informed. They catalog fingerprints, records of arrest and prosecution, and even work alongside other agencies and nonprofits to help keep guns off the streets. The work is hard, and often unseen. However, DCJS has carved out a special time for employees to show their children exactly what it is their parents do for their fellow New Yorkers.

Attendance at the Take Your Child to Work Day event at the Albany office of DCJS was sporadic at first but has grown steadily since 2015 according to one of the main organizers, Marc Schabses. Marc is a Program Research Specialist 4 and PEF Steward for Division 204. The event was put on pause in 2020 due to COVID but returned in 2024 and 2025. He said that the event has become important to members of PEF who work at DCJS, as well as employees in other bargaining units like CSEA. Over 40 children from 1st grade to 12th grade attended the event this year.

"This event really allows members to 'show off' their work to their children," said Schabses. "As a public safety support agency, our work is extremely important. On this day, children get a first-hand look at how their parents contribute to the wellbeing and safety of all New Yorkers."

For the members at DCJS, this is a humanizing moment. It is a chance, said Schabses, to go beyond the work that is being done to build relationships with supervisors, managers and co-workers. For PEF, it's also a good membership engagement opportunity. Members tell Schabses about the pride they feel in their work when their kids accompany them to the office.

"This is a concrete reminder to everyone that life is made up of more than just work," said Schabses. "When supervisors and managers get to meet and put faces and voices with the names of their staff's children, they are likely to be more empathetic or

understanding when an employee needs to call out to care for a sick child or requests time off for a class picnic or to chaperone a school field trip."

Through events like these, PEF and management also hope to share with children the potential for future careers at DCJS. Children learn about the various criminal justice and public safety opportunities that are available at DCJS and within the public sector.

"Even if they don't want to directly follow in mom or dad's footsteps, maybe they will talk to a classmate or friend about something interesting they saw while participating in the event," said Schabses. "From the daughters' and sons' perspective, they were probably bought-in as soon as they realized it would be a day off from school and all-you-can-eat pizza."

In addition to pizza, the event also features sessions and programming that introduces all aspects of the work being done at DCJS, including K-9 demonstrations, forensic evidence demonstrations, Drug Abuse Resistance Education (DARE) activities, poster contests, Internet Safety activities, police motorcycle demonstrations, Capital Tours and more.

The response from children has been positive. Schabses and other PEF members have received thank you letters and posters from children to show their gratitude. Attendance over the years has grown as well.

"The fact that attendance rebounded so strongly the last two years speaks to the fact that the program resonates with the children," Schabses said.

Plans for the next Take Your Child to Work Day at DCJS in the Spring of 2026 have already begun.

Nurse attacked while working at South Beach Psychiatric Center shares his story

By **NAJEE WALKER**

No one at PEF knew that September 17, 2024, would be such a life-changing day. As the union's elected leaders, delegates and staff prepared for the day at PEF's annual Convention in Syracuse, they received news that a fellow member and nurse at South Beach Psychiatric Center was attacked by a patient. PEF leaders delivered the news to the Convention body and immediately sprang into action.

"On September 17, he left for work, probably said goodbye to his family," said PEF Vice President Darlene Williams, to the delegation. "But he's not going to come home that same person. He will never go home the way he was when he left."

Peter Shiffman has been a registered nurse for nearly 38 years. He has been an employee of South Beach Psychiatric and a PEF member for 25 years. Shiffman was also a PEF steward and the Board President of the National Alliance of Mental Illness (NAMI) Staten Island.



Peter Shiffman following the attack spent over two weeks in a medically induced coma.

Shiffman's attack by a patient left him with multiple brain bleeds when his head struck the floor. It is a day he doesn't remember, but not for lack of trying.

"I have worked to try to remember the last time I could realistically remember walking around making rounds at South Beach," Shiffman said. "I can come up with something from a year or so before."

Shiffman was rushed to the hospital after being assaulted and spent 14 days on a ventilator in a medically induced coma. He remained in recovery at the hospital for weeks and upon waking up in the hospital, said that he could not figure out why or how he'd ended up there.

Since being released from the hospital, Shiffman's recovery has been painfully slow. He has had issues with his heart, gastrointestinal system, and his limbic system. It is clear to him that these issues were all linked to his assault, but it has been hard to find a doctor to help him with his suffering and his recovery.

"I believe that I am unique in my level of injuries. Based on the fact that eight or nine months afterwards, I am actually walking around looking for a doctor or surgeon that might be able to give me some real hope based in science and medicine," said Shiffman. "It is unlikely, but I am here."

Shiffman has had a hard time navigating the workers' compensation system as well. After finding a neurologist who did take workers' compensation, Shiffman said the doctor explained that it may not be the best route for him to take.

"He started by saying that for him to give a patient an injection in their spine, a judge has to order it," said Shiffman. "They just won't pay for it."

The doctor ultimately thought that Shiffman should be referred to a neurosurgeon.

Since then, Shiffman has been working with other doctors to manage his pain and other symptoms, still using the Workers' Compensation system. Many of his treatments, especially those that affect his brain, neck and spine, have been denied or delayed. He said that he feels as though the system is worried more about balancing its budget and spending than it is about helping him alleviate his suffering.

"The pain management doctor requested an ablation, and it has gone through three rejections and has to be considered by another person," said Shiffman.

Shiffman and PEF have been working together to try and figure out how to navigate the system. Shiffman said that while working with PEF's legal team, they pointed to prior medical records from



Peter Shiffman, years before the incident, poses for a photo with his daughter Allison Shiffman.

2023 submitted to the Workers' Compensation Board that show inconsistencies with how his treatment should be processed based on surgeries and injuries prior to—and unrelated to—the injuries he sustained on September 17, 2024.

"Rather than balance the budget on my back, why does the system not reach out and advise me on how to get help? It is disrespectful to anyone who does not work with the Workers' Compensation portal, and it is disrespectful to me," Shiffman said.

A [GoFundMe](#) setup by Shiffman's family has been created to help Shiffman cover medical costs and Out-Of-Network expenses, transportation and more as he works on recovery.

"Beyond any money, we want awareness. We hope to shine a light on the broken system that is failing frontline healthcare workers, even after they survive traumatic and near-fatal workplace injuries," wrote his daughter, Allison Shiffman, in a post on GoFundMe. "My dad may never fully recover. But with your help, we can fight for his dignity, his care, and a future where no nurse, no healthcare worker, no human being is ever forgotten like this again."

Although Shiffman has had a hard time with his recovery, the message he wants to send to his fellow members, co-workers at the Office of Mental Health and South Beach Psychiatric Center is still one of hope.

"What I want to share is that as unlikely as it is for anyone to be in the situation I am in now, as statistically impossible as it is: I am here," said Shiffman. "The reality that someone could have a life-threatening or life-changing injury on the job and feel like they've been thrown in the garbage months afterwards is not only a feeling. It's a reality. So I want everyone to know: Hope is there."

"It is absolutely necessary that repairs are made to our system so that OMH can stand for what it was intended for — to help the lives of those with mental illness, to help them with recovery and to help them have a life worth living. Everyone deserves a life worth living."





WCBS-TV interviews President Spence, PEF workplace violence victims

WCBS-TV in New York City featured PEF members Peter Shiffman and Carl Ankrah, who were attacked by patients in 2024 and 2019 while working at state psychiatric centers, and interviewed President Spence about violence at Office of Mental Health facilities across the state. Media exposure like this amplifies our [workplace violence campaign](#) and helps build public support for the legislative and policy changes for which PEF is advocating.



Stay connected to PEF on your mobile device!

The PEF App is the place to learn everything you need to know about your union and what it's doing for you. Stay informed and get involved with your union! The App allows PEF to deliver targeted information based on your Region, Division, or Agency, ensuring you're in the know and engaged.

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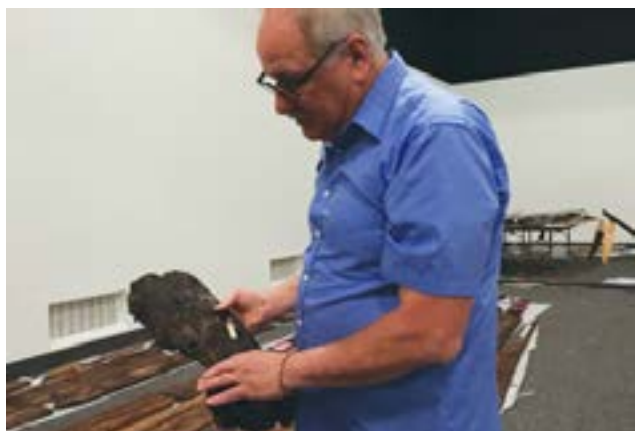
PEF members work to rebuild Revolutionary War artifact found beneath World Trade Center

By **NAJEE WALKER**

In 2010, as construction crews in Lower Manhattan were building the new World Trade Center, they discovered a gunboat from the Revolutionary War beneath the soil where the Twin Towers once stood. At the time, the professional archeologists monitoring the construction had only two weeks to excavate the boat and more than 2,000 artifacts, like musket balls, buttons and more.

For a decade, the boat was under the care of Dr. Peter Fix, an Associate Research Scientist of Archeological Watercraft and Aircraft Conservation at Texas A&M University. Much of the work to preserve the ship was done at the university. Now, the gunboat has made its way back to New York as the New York State Museum works to reconstruct the remaining 34 sections of the vessel for permanent display.

Michael Lucas is a Museum Scientist 3 and Curator of Historical Archeology at the New York State Museum. He said that the reconstruction of the gunboat has been exciting, and that PEF members and other museum employees have been volunteering their time to help with the effort.



"We have had a tremendous turnout from PEF members who helped out during the ongoing reconstruction of the World Trade Center ship remnant. Over 50 people from the State Museum, Library, and Archives volunteered on the ship reconstruction," said Lucas. "I believe that this opportunity has helped foster a sense of ownership and collaboration among the Cultural Education Center staff."

Although most of the rebuilding is done by the team from Texas A&M, Lucas plays a big part in making sure that it is taken care of by everyone who works on it.

"As a curator of historical archeology, I oversee the archeology collection which is about 4.5 million artifacts. So, if you look at the ship as an artifact—and it is a very big artifact—it is part of that collection that I oversee," said Lucas. "I liaison with the people from Texas A&M to make sure that the work is being done correctly."

In addition to his coordination efforts, Lucas has spent hours working on cleaning and assembling the gunboat as well as working alongside others to bring the larger exhibit into focus.

PEF members work to rebuild Revolutionary War artifact found beneath World Trade Center "This exhibit is going to have different areas that talk about parts of the Revolutionary

War and other different things happening during the war," said Lucas. "It will also deal with the promises of the revolution—like freedom, liberty and democracy—and how that plays out through time."

The team consists of other museum staff, including exhibit painters and builders, as well as other curators and archeologists. It is a team effort, said Lucas, that brings in people from almost every department.

Cher Schneider is an Archives Conservation Specialist 3 and Head of Conservation for the Office of Cultural Education at the museum. Normally, Schneider works on paper conservation, but she said that the experience of helping to conserve the ship and work with Texas A&M has been enlightening.

"I have learned a lot about object conservation and a lot of the information that crosses over in the preservation of materials really falls into that overarching responsibility," said Schneider. "When I was brought on, we talked a lot with leadership about preventative conservation. That includes environmental factors."

A lot of the collections at the museum, much like the gunboat, deal with organic material, so it is important, said Schneider, to make sure the temperature, relative humidity and even the lighting used are all properly regulated for the artifact. The museum also focuses on what they call Integrated Pest Management to mitigate damage from insects and animals on artifacts.

The process of building the boat has seen members from other departments within the museum pitch in and get more hands-on with a piece of history.

Barbara Lilley is a Library Development Specialist 2 with a focus on Conservation and Preservation. She said that she was nervous about working on the gunboat but was excited about working with the conservation team to clean off the hundreds of wood planks that were found at Ground Zero.

"I was asking a lot of questions about handling, and the team was very good about showing me what to do," said Lilley. "We were scraping with dental tools, so how hard do you need to scrape?"

PEF members work to rebuild Revolutionary War artifact found beneath World Trade Center. Lilley has visited several dig sites during her career. She will soon be retiring after 32 years with the agency but said that she is hopeful to be able to spend more time volunteering with the boat.

"If they still need help, I would come in when I'm retired," she said. "I hope to still go on some of the digs. We're looking for paleolithic items and that to me is fascinating. This whole experience is so different from sitting behind a computer all day. It's a great experience and you're learning all the history of this boat."

John Diefenderfer is an Archives Records Management Specialist 3 and works as the Program Officer for the Documentary Heritage Program at the New York State Archives. The program provides grant funding to non-governmental historic records repositories in the state. Although that is somewhat far removed from the conservation of the boat, Diefenderfer could not resist volunteering on the project.

"There was an email sent around that the boat had arrived, and I said: 'This is a once in a lifetime opportunity,'" said Diefenderfer. "My supervisor said absolutely and to go for it, so I came down and signed up."

Diefenderfer said that dealing with 200-year-old wooden planks was nerve-wracking but rewarding.

"It was surprising how robust and sturdy 200-year-old wood can be," said Diefenderfer. "If you think about it being buried under the World Trade Center, you would think it would be mush. But it's held up."

The gunboat is slated to be one of the centerpieces for the New York State Museum's celebration of the 250th Anniversary of the Declaration of Independence on July 4, 2026, and is expected to attract visitors from across the country and even around the world.

Schneider and Lucas both hope that visitors to the exhibit take the time to appreciate both the history of the gunboat and the time, labor and planning that went into the work. It is a team effort, they said, to install the project, document it, conserve the artifact, and plan the exhibition.

"One of the most powerful parts of this exhibit is that the installation and parts of conservation took place in view of the public," said Schneider. "That kind of transparency is rare. When we do our jobs well, it often looks effortless. But there's no magic wand. It's detailed, methodical and deeply physical work that demands patience, creativity and commitment."





President Spence, right, was congratulated by NYSPEC Chairman Peter Meringilo, left, and NYS Comptroller Tom DiNapoli, July 29 on Long Island.

President Spence named PEC co-chair

After several years of active participation in the [New York State Public Employee Conference \(NYSPEC\)](#), a coalition of labor unions that fight for the rights of public employees in the State, PEF President Wayne Spence was recently named a co-chair.

"I am grateful for this opportunity to continue working with this coalition to build PEF's political power and use the coalition's collective voice to affect real change for our members across New York," said President Spence. "By participating in organizations such as the Public Employee Conference, we position PEF as a leader in the labor movement. We are stronger together."

NYSPEC was formed just before the creation of PEF, in 1977, and has grown from an initial group of 13 member unions to more than 90 unions and umbrella organizations today.

President Spence's involvement in the coalition will help propel PEF's legislative agenda and top priorities into the spotlight and build a united front for organized labor concerns across the state.



PEF Region 7 awards scholarships

By **NAJEE WALKER**

PEF Region 7 has awarded its 2025 Paul Normandeau Scholarship to Adrian Mirza and the 2025 Ellen Mainville Scholarship to Lilliana Morin.

The Paul Normandeau Scholarship was created to honor the hard work and memory of the PEF Region 7 member who worked for the New York State Department of Transportation and tragically lost his life to COVID.

Adrian will use the \$1,000 scholarship to offset the cost of his education at the Modern Welding School in Schenectady, N.Y. He is an avid volunteer and has used his free time volunteering at the Peru SPAC. He has wanted to be a welder since he was in middle school and values what trade schools can bring to people.

"Trades are an important part of life and skilled workers are an asset to our communities," said Adrian.

Lidia Mirza, Adrian's mother, works at Clinton Correctional Facility as a Registered Nurse.

The Ellen Mainville scholarship was created to honor the hard work and memory of Region 7 Member Ellen L. Mainville. She was employed by the Department of Corrections as a teacher at Bare Hill Correctional Facility in Malone, N.Y. Ellen also lost her life to COVID.

Lilliana will use the \$1,000 scholarship award to help pay for her education at Erie Community College, where she plans to major in nursing. Her eventual goal is to work at Roswell Park Comprehensive Cancer Center in Buffalo as an RN.

Lisa Morin is Lilliana's mother. She works at OPWDD-Sunmount as a Nurse Practitioner.



Region 7 Coordinator Barbara Stransky, left, and Scholarship Committee Chair Carly Gagnon, right, award scholarships to winners Adrian Mirza and Lilliana Morin.



Blast from the Past

Challenges for unions in 1995 are still being fought 30 years later

By **NAJEE WALKER**

"The fight for public services and against privatization is going to be a battle for many years."

These were the words PEF President Jim Sheedy wrote in his "President's Message" following the 17th Annual PEF Convention in Kiamesha Lake, N.Y., in November 1995. He charted a plan for the future when the outlook for unions and public services looked bleak.

"I believe that this convention and this coming year can and must start a new era in our union's history," said Sheedy. "The world as we know it has changed."

In 1995, like today, the country faced cuts to Medicare and Medicaid to fund billion-dollar tax breaks, as well as other cuts being made at the federal level. As a result, at the state level, former Governor George Pataki sought to lay off hundreds of public sector workers.

Former President Sheedy, recognizing that political leaders and decision makers across all levels of government were making changes that would negatively affect PEF members and their families, urged members to become politically active organizers.

"Ask yourself this question," wrote Sheedy. "Where will our union be in five years if we don't organize, and the current political leadership in Albany and Washington have their way? How far could these budget cutters go?"

President Sheedy also recognized the importance of new and younger members joining the union.

"Politics isn't the only way we're going to build the union's political power," he said. "We also need to begin bringing new blood, new energy and new members into our union."

Thirty years later, the concerns of 1995 have returned. Federal budget cuts and funding claw backs from earlier in the year have already threatened state jobs, and while Governor Hochul has pledged to support the public workforce, we won't truly know the impact of federal funding cuts until she proposes her Executive Budget in early 2026.

In 1995, Sheedy believed in organizing with other unions and the private sector. He also believed that by connecting political power and the labor movement with the court of public opinion, PEF and workers across the state could improve services and the lives of working families. To that end, he launched a Public Service Campaign, with the aim of educating New Yorkers about the work done by PEF members every day.

"We've got to win the hearts and minds of the 18 million New Yorkers who count on us for everything from safe milk, to well-designed highways, to quality care for disabled loved ones," he said. "We have no choice. We must meet the challenge of improving government services, state workers' lives, and the labor movement by building our political power through a stronger COPE and political-action program, by organizing new members and by waging a strong, visible public-service campaign."

Sheedy said that his main reason for pushing for PEF to become more political at a time when politics was becoming deeply divisive boiled down to two things. The first were the lives of hard-working PEF members. The second was creating a future for his children and grandchildren.

"I feel like we're fighting not just for ourselves but for those who are going to follow us," he wrote. "Let's start the era of PEF's new political power. Together, we can do it."

President's Message

New times call for powerful new strategies

This was the 17th PEF convention I've attended. Let me share now with all PEF members some of the thoughts and news I brought to our delegates at the convention last month in Klamath Lake.

I have seen our union mature and grow, despite the many obstacles we have faced.

I believe that this convention and this coming year can and must start a new era in our union's history.

The world as we know it has changed. Radicals who want to destroy decades of progress and the public services we have built now have political power. Billion-dollar corporations, the Business Council, Change New York, and their political allies in our state capital, have begun a four-year assault on state workers that will continue until the next governor's election.

House Speaker Newt Gingrich and his band of Capitol Hill political terrorists in Washington have chopped Medicare and Medicaid for our parents and grandparents. In order to fashion a multi-billion-dollar tax break for America's wealthiest citizens. And that's just the tip of their iceberg, one of their many attacks on our program and families.

Many things we have seen our state and national governments do over the past year haven't been fair and haven't been right. But because of the power the anti-government radicals now have, they've been able to get away with it.

make, from now on, has to focus on building PEF's power to improve our working conditions and our political clout. Without more power, we're sunk. Without unity, we will fail.

One way we're going to build our power for the coming fights is by building our COPE Fund.

Like it or not, money is power.

I know hundreds of members have signed up already, responding "yes" to our question: "Is your job worth 50 cents a day?"

Remember, every important political body that affects our jobs, our families, and our futures is up for election in one year. That's why COPE is important. And that money is only going to be used for politics and member education, not for the PEF budget or anybody's salary. It's going to go where you want it to go.

My thanks to PEF Statewide Political Action Committee Chair Enid Mitchell, the regional PAC chairs, and COPE coordinators, the Service Employees International Union (SEIU) staff who have helped this effort and to all of you, for

building COPE and building our power.

It's going to take the same kind of one-on-one commitment you've shown on COPE to reward our friends and punish our enemies in next year's elections. We hope to train dozens of you, using the resources of APT and SEIU, to become campaign leaders to protect pro-government officials and take out some of the worst offenders who have attacked us. This is the best way to build PEF's political clout in every region of this state.

New members, new energy

Politics isn't the only way we're going to build union's political power. We also need to begin bringing new blood, new energy and new members into our union.

Organizing new members isn't just a question of helping to maintain our financial bottom line, although it's an important consideration.

Organizing is really a question of self-interest. The only way to protect good jobs, decent wages and

strong benefits in the public sector is to help raise them in the public-financed private sector.

Let me say that again — if we don't raise the wages, benefits, and working conditions of the publicly-financed private-sector workforce, then our enemies will continue to use them to lower our standards.

By organizing new members in the private sector, we'll be protecting their interests, while protecting our jobs and our future.

Ask yourself this question: "Where will our union be in five years, if we don't organize, and the current political leadership in Albany and Washington have their way? How far could these budget cutters go?"

If you're unhappy with our political clout now, think about how strong we'll be if we are cut by one-quarter or one-third.

In the past, I have not been a vocal supporter of organizing. But I will be with you at the work sites to talk to

(Continued on Page 13)



ON THE COVER

□ **At bat in Washington:** Bob Hansen, Stan Byer, Dan Steen, Alan Schulkin, Ken Robertson and Mike Darcy. Present, but not shown are George DeRosa, Wayne Bayer.

— Photo by Earl Dotter

□ **RECLAIM NY:** Jennifer Faucher

— Photo by Ken Diachel



Don't forget about your Article 15 benefits!

Article 15 of the PS&T contract allocates money to PEF members for training courses and grants, as well as reimbursement for workshops and license exam fees. The PEF/State Joint Professional Development Committee (PDC) works to assess the professional development and training needs of PEF members and establishes training that improves the skills and knowledge needed for job performance. The PEF Education & Training Department recently produced [this summary of the primary Article 15 program benefits](#). PEF posts all [Public Service Workshop Program announcements](#) and registration links on the union website as they are made available.

RETIREES IN ACTION:

We must educate members and the public on the value of the labor movement

By **JIM CARR**

I spent 33 years working for the New York State Department of Corrections (now the Department of Corrections and Community Supervision, or DOCCS) where I learned the importance of a union and the value of uniting in a workplace. Without unions, workers have very few protections from abusive employers.

I believe today's younger generations take many of our hard-fought gains for granted. Unions today are under continuous assault from the current federal government because unions are one of the few remaining pillars of our democracy. Unions are fighting back in the streets and in the courts, but unfortunately many union members have no idea about the consequences of an anti-union movement backed by a hostile White House. Unions need to educate themselves and their members to better fight the anti-union agenda in today's America. The history of the American labor movement needs to be taught in every school in this land.

"America is a living testimonial to what free men and women organized into free democratic trade unions can do to make a better life, we ought to be proud of it," said Vice President Hubert Humphrey in 1977.

According to a poll by Hart Research, 54% of adults said they know just a little or don't know much about unions. They said their chief sources of knowledge were personal experience (37%), people in unions (26%) and the media (25%). Significantly, learning about unions in school was not even mentioned.

The implications of these numbers are clear. To a very large degree, Americans are uninformed or misinformed about the labor movement and the role that workers have played, and continue to play, in our nation's economic, political and cultural life.

Academic standards and curriculum resources, such as textbooks, have historically ignored or been deficient in their treatment of workers and the labor movement. Significantly, there are teachers who want to cover this history in their classrooms, but there has been no place for them to easily find materials. Until now!

The mission of the American Study Center is to inform teachers about the rich and varied curriculum resources available to integrate into lessons. I recently learned of the American Labor Studies

Center at the annual New York State Alliance for Retired Americans conference. It has been my experience that the next generation of American workers have a little or no knowledge of our labor history and our struggles to win hard-fought gains which benefit every American worker in today's workforce, as well as our retirees who enjoy the hard-earned benefits of our labor.

Unions built the middle class, and the middle class drives the economy! Retirees know this because when we organize and work together, we enable our local chapters to show their strength, and we know how to maintain economic security, health, and the middle class. Protecting the things for which our union fought requires all of us pulling together. Retirees understand this because it's how we helped build the union. We need to rise up and organize in support of our friends (union endorsed candidates) in the November elections.

We may love or hate politics, but they are an integral part of our lives. It is necessary to do what we can to keep and improve our situation as retirees. We ask that you stay engaged and informed, whatever your affiliation may be. This will be a pivotal year with each of us having the obligation to vote in November. Ask yourself which side you are on: Corporations and a billionaire class or Unions and a middle class?

We just celebrated Labor Day. Before it became a federal holiday, Labor Day was organized by labor activists and individual states. After municipal ordinances were passed in 1885 and 1886, a movement developed to secure state legislation. New York was the first state to introduce a bill, but Oregon was the first to pass a law, recognizing Labor Day on Feb. 21, 1887. In 1887, four more states, Colorado, Massachusetts, New Jersey and New York, passed laws creating a Labor Day holiday. By the end of the decade, Connecticut, Nebraska and Pennsylvania followed suit. By 1894, 23 more states had adopted the holiday, and on June 28, 1938, Congress passed an act making the first Monday of September of each year a legal holiday.

Remember, when we vote our labor values we help secure a more prosperous future - unless we fail to educate ourselves!

Proposed Constitutional Amendment

The following proposed amendment to Article VII(C)(1) of the PEF Constitution will be presented for ratification to delegates at the 2025 PEF Convention. The amendment was approved by the PEF Executive Board at its December 5 and 6, 2024, meeting for presentation to the delegates. The proposal would amend Article VII(C)(1) of the PEF Constitution to deem the New York State Office of Information Technology Services as a separate Department for the purposes of representation under Article VII.

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

Article VII Executive Board

C. Composition:

The Executive Board shall be composed of the Officers, Board Representatives, and a Retiree Representative appointed by the President; provided, however, that no Retiree Representative shall be entitled to vote on the PEF budget or on matters affecting the terms and conditions of employment of Regular members, including but not limited to contract negotiations, contract ratification and contract enforcement.

1. Executive Board Representatives shall be Departmental representatives. For the Founding Convention, all Board Members shall be apportioned on a Departmental basis. This and all subsequent apportionments shall allow, regardless of membership size, a minimum of one representative to each Department, as defined in the New York State Legislative Manual. For the purposes of representation under Article VII, all agencies within the Executive Department with 300 or more PEF members shall each be deemed a single Department, all New York State Public Authorities shall be deemed to be a single Department; all New York State Public Benefit Corporations shall be deemed to be a single Department; all Political Subdivisions of New York State shall be deemed to be a single Department; all not-for-profit/charitable organizations shall be deemed a single Department; and all other private sector employers shall be deemed a single Department. The State Education Department, the State University of New York, the New York State Higher Education Services Corporation and the New York State Insurance Fund, [and] the New York State Workers' Compensation Board, and the New York State Office of Information Technology Services shall be deemed separate Departments for the purposes of representation under Article VII. The New York State Foundation for Science, Technology and Innovation shall be deemed part of the Department of Economic Development for the purpose of determining Executive Board representation according to this Article.

Your fellow members need your leave donations

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.

Lynette Ambrose is a training specialist 1 at Western New York DDSO in West Seneca.

Jolene Bariteau is a rehabilitation specialist 2 at Capital District Psychiatric Center in Albany.

Barbara Bertucio is a curatorial visitor services specialist 1 at the Office of General Services in Albany.

Kevin Bromley is a registered nurse 1 with the Office for People with Developmental Disabilities in Norwood.

Elizabeth Newman Cable is a patient access supervisor at Roswell Park Comprehensive Cancer Center in Buffalo.

Rhonda Carroll-Eldridge is a dairy products specialist 1 at the Department of Agriculture and Markets in Steuben County.

Brian Cellery is an information technology specialist 3 at the Office of Information Technology Services in Albany.

Maritza Echevarria is an ICM at Bronx Psychiatric Center in the Bronx.

Kimberly Ernst-Harris is a supervising offender rehabilitation coordinator at the state Department of Corrections and Community Supervision central office in Albany.

Heather Farthing is a registered nurse 2 at Capital District Psychiatric Center in Albany.

Ilianna Fermin is a Social Worker at Bronx Psychiatric Center in the Bronx.

Sally Fontana is social work supervisor 1, LCSW at Mohawk Valley Psychiatric Center in Utica.

Alex Frye is a registered nurse 1 at SUNY Upstate in Syracuse.

Amber Fulton is a registered nurse 2 at SUNY Upstate in Syracuse.

Naomi Gillespie (Jusino) is a tax technician 1 at the Department of Tax and Finance in Albany.

Wayne Green is a maintenance supervisor 3 at St. Lawrence Psychiatric Center in Ogdensburg.

Kathryn Hampton is a human rights specialist 2 at the Division of Human Rights in Brooklyn.

Julia Hargens is a registered nurse 1 as SUNY Upstate in Syracuse.

Kathleen Hill is a registered nurse 1 at SUNY Upstate in Syracuse.

Ann Krenn is an Offender Rehabilitation Coordinator at Groveland Correctional Facility in Sonyea.

Nina Ledkovsky is a registered nurse 1 at Green Haven Correctional Facility in Stormville.

Kimberly MacDuff is a taxpayer services specialist trainee 1 at the Department of Tax and Finance in Albany.

Gerard Mazurkiewicz is a fire protection specialist 1 at the Department of Homeland Security and Emergency Services in Buffalo.

Lee Moore is an auditor 2 at the Department of Tax and Finance in Syracuse.

Alexis Mosher is a registered nurse 1 at SUNY Upstate in Syracuse.

Rose Niang is an investigative specialist 1 at the Department of Education in Manhattan.

Adrienne Nicholson is a Medicaid eligibility examiner 3 at the Department of Health in Albany.

Danielle Newell-Emory is an investigative specialist 1 at the Office of Cannabis Management in Albany.

Cecilia O'Shea is a legal assistant 2 at the Department of Tax and Finance in Albany.

Rosemary Oduh is an information technology specialist 2 at the Office of Information Technology Services in Albany.

Nicole Skaros-Marcello is a training specialist 1 at OPWDD Western New York DDSO in West Seneca.

Harold Stone is an investigative specialist 1 in the Bureau of Narcotic Enforcement, Department of Health in Syracuse.

Sabrina Vaccarello is a registered nurse supervisor 1 at SUNY Stony Brook on Long Island.

Nicole Welch is an auditor trainee 1 at the Department of Tax and Finance in Syracuse.

Jennifer Wells is a registered nurse 2 at SUNY Upstate in Syracuse.

Jen Wolcott-Dean is a vocational instructor 4 at Wyoming Correctional Facility in Attica.

Jennifer Zullo is a research scientist 2 at the Office for People With Developmental Disabilities in Albany.



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 174 and 175 of the [2023-26 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 communicator@pef.org, or call 518-785-1900.



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

**Consolidated Financial Statements as of
March 31, 2025 and 2024
Together with
Independent Auditor's Report**

INDEPENDENT AUDITOR'S REPORT

August 13, 2025

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 (the Organization), which comprise the consolidated statements of financial position as of March 31, 2025 and 2024, 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 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, 2025 and 2024, 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 the Organization 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 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 the Organization's ability to continue as a going concern within one year after the date that the consolidated financial statements are available to be issued.

6 Wembley Court
Albany, NY 12205
p (518) 464-4080
f (518) 464-4087

www.bonadio.com

(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 the Organization'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 the Organization'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.

(Continued)

INDEPENDENT AUDITOR'S REPORT

(Continued)

Report on Supplementary Information

Our audits were conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The consolidating information in Schedules I and II is presented for purposes of additional analysis of the consolidated financial statements rather than to present the statement of financial position and statement of activities and change in net assets of the individual companies and is not a required part of the consolidated financial statements. The consolidated schedule of expenses and statements of operating expenses in Schedules III and IV are presented for the purpose of additional analysis and are not required parts 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 supplementary 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 supplementary information is fairly stated in all material respects in relation to the consolidated financial statements as a whole.

Donadio & Co., LLP

NEW YORK STATE PUBLIC EMPLOYEES FEDERATION AND SUBSIDIARY

CONSOLIDATED STATEMENTS OF FINANCIAL POSITION MARCH 31, 2025 AND 2024

	<u>2025</u>	<u>2024</u>
ASSETS		
CURRENT ASSETS:		
Cash and cash equivalents	\$ 12,949,631	\$ 10,930,198
Investments	15,517,198	14,584,267
Membership dues receivable	726,006	520,577
Due from related parties and other receivables, net of allowance for credit losses of \$35,000 for 2025 and \$25,000 for 2024	2,474,582	1,902,273
Prepaid expenses	565,338	624,305
Total current assets	<u>32,232,755</u>	<u>28,561,620</u>
PROPERTY AND EQUIPMENT, net	<u>4,351,021</u>	<u>4,609,897</u>
OTHER ASSETS:		
Right-of-use assets - operating leases	2,233,718	2,876,698
Restricted cash - COPE	88,831	94,224
Deposits	321,748	322,491
Total other assets	<u>2,644,297</u>	<u>3,293,413</u>
	<u>\$ 39,228,073</u>	<u>\$ 36,464,930</u>
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES:		
Accounts payable	\$ 391,847	\$ 516,275
Current portion of finance lease liability	81,501	78,147
Current portion of operating lease liabilities	854,866	878,275
Employee organizational leave	266,675	46,250
Accrued liabilities	2,384,667	1,836,965
Accrued vacation	1,066,922	942,897
Total current liabilities	<u>5,046,478</u>	<u>4,298,809</u>
LONG-TERM LIABILITIES		
Finance lease liability, net of current portion	266,099	347,600
Operating lease liabilities, net of current portion	1,552,451	2,174,635
Accrued post-retirement benefits	18,522,777	16,407,457
Total long-term liabilities	<u>20,341,327</u>	<u>18,929,692</u>
Total liabilities	<u>25,387,805</u>	<u>23,228,501</u>
NET ASSETS:		
Without donor restrictions:		
Designated by Board	7,948,689	7,821,745
Post-retirement costs (credits) recognized in net assets, net	(2,766,124)	(2,267,124)
Undesignated	8,568,872	7,587,584
Total net assets without donor restrictions	13,751,437	13,142,205
With donor restrictions	88,831	94,224
Total net assets	<u>13,840,268</u>	<u>13,236,429</u>
Total liabilities and net assets	<u>\$ 39,228,073</u>	<u>\$ 36,464,930</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, 2025 AND 2024

	<u>2025</u>	<u>2024</u>
CHANGES IN NET ASSETS WITHOUT DONOR RESTRICTIONS:		
REVENUES, GAINS, AND OTHER SUPPORT:		
Membership dues	\$ 44,381,800	\$ 40,783,304
Less:		
Divisional distributions	1,498,908	1,327,512
Per capita taxes, net of rebates	10,127,645	9,561,305
Affiliation dues	331,945	315,940
Net membership dues	<u>32,423,302</u>	<u>29,578,547</u>
Other support:		
Interest and dividend income	566,869	339,828
Grant income	606,700	602,647
Advertising income, net	1,350	14,309
Other income	1,400,424	1,633,078
Total other support	<u>2,575,343</u>	<u>2,589,862</u>
Net assets released from restrictions:		
Satisfaction of program restrictions	<u>299,471</u>	<u>246,147</u>
Total revenues, gains, and other support	<u>35,298,116</u>	<u>32,414,556</u>
EXPENSES:		
Salary and benefit expenses	23,093,113	20,775,678
Staff travel and related expenses	870,866	840,055
Program related expenses	3,360,386	2,990,725
Operating expenses	5,968,090	5,811,924
Depreciation	694,270	644,315
Total expenses	<u>33,986,725</u>	<u>31,062,697</u>
CHANGE IN NET ASSETS FROM OPERATIONS	1,311,391	1,351,859
NON-OPERATING ACTIVITIES:		
Other components of net periodic post-retirement expense	(862,941)	(727,512)
Investment gains, net	<u>659,782</u>	<u>1,428,748</u>
CHANGE IN NET ASSETS BEFORE OTHER CHANGES IN NET ASSETS	1,108,232	2,053,095
OTHER CHANGES IN NET ASSETS:		
Post-retirement changes other than net periodic benefit costs	<u>(499,000)</u>	<u>(3,664,646)</u>
TOTAL CHANGE IN NET ASSETS WITHOUT DONOR RESTRICTIONS	<u>609,232</u>	<u>(1,611,551)</u>
CHANGES IN NET ASSETS WITH DONOR RESTRICTIONS:		
Contributions	294,078	247,081
Net assets released from restrictions	<u>(299,471)</u>	<u>(246,147)</u>
TOTAL CHANGE IN NET ASSETS WITH DONOR RESTRICTIONS	<u>(5,393)</u>	<u>934</u>
TOTAL CHANGE IN NET ASSETS	603,839	(1,610,617)
NET ASSETS - beginning of year	<u>13,236,429</u>	<u>14,847,046</u>
NET ASSETS - end of year	<u>\$ 13,840,268</u>	<u>\$ 13,236,429</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, 2025 AND 2024

	2025			2024		
	<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	\$ 11,767,297	\$ 1,562,133	\$ 13,329,430	\$ 10,879,736	\$ 1,424,302	\$ 12,304,038
Per capita	10,127,645	-	10,127,645	9,561,305	-	9,561,305
Benefits	6,712,395	935,694	7,648,089	5,410,142	1,521,066	6,931,208
Member meetings expense	2,805,259	-	2,805,259	2,596,896	440	2,597,336
Divisional distributions	1,498,908	-	1,498,908	1,327,512	-	1,327,512
Professional fees	1,278,950	155,299	1,434,249	1,225,438	149,394	1,374,832
Rent	1,075,811	32,357	1,108,168	1,091,847	32,259	1,124,106
Payroll taxes	1,017,630	141,945	1,159,575	917,483	163,609	1,081,092
Union leave	930,869	-	930,869	462,791	-	462,791
Staff transportation	840,477	30,387	870,864	758,538	49,243	807,781
Depreciation	562,463	131,751	694,214	521,991	122,324	644,315
Computer fees	59,137	581,780	640,917	33,803	441,062	474,865
Employee organizational leave	555,127	-	555,127	427,320	-	427,320
Advertising	374,981	34,781	409,762	488,723	44,716	533,439
Affiliation dues	331,945	-	331,945	315,940	-	315,940
COPE	299,471	-	299,471	246,147	-	246,147
Legislative	265,115	-	265,115	175,600	-	175,600
Arbitration	230,917	-	230,917	239,365	-	239,365
Insurance	114,972	111,523	226,495	141,645	97,363	239,008
Postage	139,544	47,268	186,812	162,897	41,990	204,887
Telephone	128,026	41,219	169,245	87,988	96,306	184,294
Office supplies	46,949	79,299	126,248	74,458	60,760	135,218
Reproduction	149,474	(27,840)	121,634	227,629	(31,940)	195,689
Utility	62,418	59,005	121,423	60,345	49,793	110,138
Janitorial and security	102,081	18,742	120,823	97,732	17,799	115,531
Temporary hires	98,210	7,488	105,698	61,994	4,931	66,925
Books and reference material	89,534	805	90,339	81,615	1,773	83,388
Maintenance and repair	6,945	78,519	85,464	3,684	102,034	105,718
Contributions	70,268	-	70,268	41,341	-	41,341
Scholarships	46,100	-	46,100	46,700	-	46,700
Steno and transcript fees	45,069	-	45,069	41,203	-	41,203
Training	13,950	14,653	28,603	-	-	-
Minor equipment purchases	13,401	13,418	26,819	9,341	15,051	24,392
Interest	16,427	-	16,427	9,703	-	9,703
Credit loss expense	-	10,000	10,000	-	-	-
Taxes	-	-	-	18,455	-	18,455
Miscellaneous	1,178	6,054	7,232	2,133	13,739	15,872
Total	\$ 41,878,943	\$ 4,066,280	\$ 45,945,223	\$ 37,849,440	\$ 4,418,014	\$ 42,267,454

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, 2025 AND 2024

	<u>2025</u>	<u>2024</u>
CASH FLOWS FROM OPERATING ACTIVITIES:		
Change in net assets	\$ 603,839	\$ (1,610,617)
Adjustments to reconcile change in net assets to net cash flow from operating activities:		
Depreciation and amortization	694,270	644,315
Net depreciation (appreciation) of investments	(659,782)	(1,428,748)
Credit loss expense	10,000	-
Changes in:		
Membership dues receivable	(205,429)	(40,406)
Due from related parties and other receivables	(582,309)	2,555,578
Prepaid expenses	58,967	(235,946)
Operating leases	(2,613)	(73,787)
Deposits	743	(34)
Accounts payable and other accrued liabilities	(124,428)	(1,183,047)
Accrued liabilities	547,702	364,073
Employee organizational leave	220,425	(206,147)
Accrued vacation	124,025	31,811
Accrued postretirement benefits	<u>2,115,320</u>	<u>4,676,859</u>
Net cash flow from operating activities	<u>2,800,730</u>	<u>3,493,904</u>
CASH FLOWS FROM INVESTING ACTIVITIES:		
Purchase of investments	(3,974,130)	(3,081,934)
Proceeds from sale of investments	3,700,981	3,082,563
Proceeds from sale of property and equipment	115	180,087
Purchases of property and equipment	<u>(435,509)</u>	<u>(957,576)</u>
Net cash flow from investing activities	<u>(708,543)</u>	<u>(776,860)</u>
CASH FLOWS FROM FINANCING ACTIVITIES:		
Issuance of finance lease obligation	-	425,746
Repayment on finance lease liabilities	<u>(78,147)</u>	<u>(230,745)</u>
Net cash flow from financing activities	<u>(78,147)</u>	<u>195,001</u>
CHANGE IN CASH, CASH EQUIVALENTS, AND RESTRICTED CASH	2,014,040	2,912,045
CASH, CASH EQUIVALENTS, AND RESTRICTED CASH - beginning of year	<u>11,024,422</u>	<u>8,112,377</u>
CASH, CASH EQUIVALENTS, AND RESTRICTED CASH - end of year	<u>\$ 13,038,462</u>	<u>\$ 11,024,422</u>
SUPPLEMENTAL DISCLOSURES OF CASH FLOW INFORMATION		
Cash paid during the year for interest	<u>\$ 16,427</u>	<u>\$ 9,703</u>
CASH AND CASH EQUIVALENTS AND RESTRICTED CASH CONSIST OF THE FOLLOWING:		
Cash and cash equivalents	\$ 12,949,631	\$ 10,930,198
Restricted cash - COPE	<u>88,831</u>	<u>94,224</u>
	<u>\$ 13,038,462</u>	<u>\$ 11,024,422</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, 2025 AND 2024

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 (GAAP).

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.

Use of Estimates

The preparation of consolidated financial statements in accordance with GAAP 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.

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 and cash equivalents 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 Committee of Political Education (COPE) contributions received from members. These funds are segregated and forwarded to both American Federation of Teachers (AFT) COPE and Service Employees International Union (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, less investment management fees.

Receivables, net

Membership Dues and Other Receivables

Membership dues receivable and other receivables are stated at the unpaid balances net of allowances for credit losses based on review of all outstanding amounts on a monthly basis. The carrying amount of the receivables is reduced by an allowance for credit losses that reflects management's best estimate of the amounts that will not be collected. Management periodically evaluates the allowance for credit losses by identifying troubled accounts and by using historical experience applied to an aging of accounts. The allowance method is used for providing bad debts from receivables. Accounts are written-off when management determines they are uncollectible.

A receivable is considered past due if any portion of the receivable balance is outstanding for more than 180 days. The Organization does not charge interest on any past due balances.

Due from related parties consist of amounts due from entities that share common members or from PEF members themselves, see Note 12 for additional information regarding related party receivables.

Allowance for Credit Losses

An allowance for credit losses is an estimate based upon historical account write-off trends, facts about the current financial condition of the debtor, forecasts of future operating results based upon current trends, and macroeconomic factors. Credit quality is monitored through the timing of payments compared to payment terms and known facts regarding the financial condition of debtors. Accounts receivable balances are charged off against the allowance for credit losses after recovery efforts have ceased.

The Organization uses historical loss information based on the aging of receivables as the basis to determine expected credit losses for receivables and believes that the composition of receivables at year-end is consistent with historical conditions as credit terms and practices and the membership base has not changed significantly. The Organization calculated the estimate for the allowance for credit losses based on an annual historical average calculation of credit loss expenses to the receivables balance at year-end.

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Allowance for Credit Losses (Continued)

Change in the allowance for credit losses for the years ended March 31, 2025 and 2024, were as follows:

	<u>2025</u>	<u>2024</u>
Beginning balance	\$ 25,000	\$ 25,000
Provision for credit losses	10,000	-
Write-offs	<u>-</u>	<u>-</u>
Ending balance	<u>\$ 35,000</u>	<u>\$ 25,000</u>

Property and Equipment, net

Property and equipment are carried at cost. Depreciation is computed using 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 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 gain or loss is included in the change in net assets. On an on-going basis, the Organization assesses impairment of its property and records the appropriate adjustments, if necessary.

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 GAAP, 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.

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Revenue Recognition (Continued)

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 \$36.77 and \$35.70 per member up to 200 members for the years ended March 31, 2025 and 2024, respectively. For larger divisions, the distribution allocated in excess of 200 members was \$29.43 and \$28.57 for the years ended March 31, 2025 and 2024, respectively.

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 \$153,805 and \$144,099 for the years ended March 31, 2025 and 2024, 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 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.

Other Income

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.

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.

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Timing of Revenue Recognition

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

	<u>2025</u>	<u>2024</u>
<u>Contract Revenue Types</u>		
Goods and services transferred over time	\$ 45,782,224	\$ 42,416,382
Goods and services transferred at a point in time	<u>1,350</u>	<u>14,309</u>
	<u>\$ 45,783,574</u>	<u>\$ 42,430,691</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 recognized, a contract liability (unearned revenue) is recorded. Contract balances were as follows for the years ended March 31:

	<u>2025</u>	<u>2024</u>	<u>2023</u>
Contract Assets:			
Membership dues receivable	\$ 726,006	\$ 520,577	\$ 480,171
Due from related parties and other receivables	<u>2,474,582</u>	<u>1,902,273</u>	<u>4,457,851</u>
	<u>\$ 3,200,588</u>	<u>\$ 2,422,850</u>	<u>\$ 4,938,022</u>

Leases

The Organization determines if an arrangement is a lease at inception. Right-of-use ("ROU") assets represent the Organization's right to use an underlying asset for the lease term and lease liabilities represent an obligation to make lease payments arising from the lease. Lease ROU assets and liabilities are recognized at commencement date based on the present value of lease payments over the lease term. The lease may include renewal and termination options, which are included in the lease term when the Organization is reasonably certain to exercise these options.

For all underlying classes of assets, the Organization has elected to not recognize ROU assets and lease liabilities for short-term leases that have a lease term of 12 months or less at lease commencement and do not include an option to purchase the underlying asset that the Organization is reasonably certain to exercise. The Organization recognizes fixed short-term lease cost on a straight-line basis over the lease term and variable lease cost in the period in which the obligation is incurred.

The Organization elected for all classes of underlying assets, to use the risk-free rate as the discount rate if the implicit rate in the lease contract is not readily determinable.

The Organization elected for all classes of underlying assets to not separate the lease and non-lease components of a contract and to account for as a single lease component.

Variable lease costs paid to or on behalf of the lessor, consisting mainly of property taxes, maintenance expense and insurance, are excluded from the measurement of the ROU asset and lease liability and are expensed in the period incurred.

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Leases (Continued)

In evaluating contracts to determine if they qualify as a lease, the Organization considers factors such as if the Organization obtained substantially all of the rights to the underlying asset through exclusivity, if it can direct the use of the asset by making decisions about how and for what purpose the asset will be used, and if the lessor has substantive substitution rights. This evaluation may require significant judgment.

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, 2023 through April 1, 2026.

Statements of Activities and Change in Net Assets

The statements of activities and change in net assets are divided into operating and non-operating components. All revenue and expenses directly associated with the day-to-day operations are included in change in net assets from operations. Revenues associated with realized and unrealized gains and losses on investments and charges related to other components of net periodic post-retirement costs are reported on the statements of activities and change in net assets as non-operating activities.

Statements of Functional Expenses

In the statements 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. As of March 31, 2025 and 2024, net assets with donor restrictions are made up entirely of COPE contributions.

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

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, 2026

Advertising Costs

The Organization expenses advertising costs as incurred. The total advertising expense for the years ended March 31, 2025 and 2024 was \$409,762 and \$533,439, 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.

Financial Instruments Measured at Fair Value

The Organization uses various valuation techniques in determining fair value and classifies into a three-level hierarchy based on the nature of the inputs. Level 1 valuations are based on quoted prices in active markets for identical assets or liabilities that the Organization has the ability to access. Level 2 valuations are based on inputs, other than quoted prices included within Level 1 that are observable either directly or indirectly. Level 3 valuations are based on inputs that are unobservable and significant to the overall fair value measurement. The asset's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement.

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, 2025 and 2024, the Organization has the following financial assets available to meet cash needs for general expenditures within one year of the statement of financial position date:

	<u>2025</u>	<u>2024</u>
Financial assets:		
Cash and cash equivalents	\$ 12,943,020	\$ 10,930,198
Investments	15,517,198	14,584,267
Membership dues receivable	726,006	520,577
Due from related parties and other receivables, net	2,474,582	1,902,273
Total financial assets	<u>31,660,806</u>	<u>27,937,315</u>
Less: Assets unavailable for general expenditure		
Net assets designated by board	<u>(7,948,689)</u>	<u>(7,821,745)</u>
Total financial assets available to meet cash needs for general expenditures within one year	<u>\$ 23,712,117</u>	<u>\$ 20,115,570</u>

3. LIQUIDITY (Continued)

The Organization has \$23,712,117 and \$20,115,570 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, 2025 and 2024, 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.

The Organization also had Board designated net assets without donor restrictions of \$7,948,689. Although the Organization's Board does not intend to release these designations, these funds are available if necessary.

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>2025</u>	<u>2024</u>
U.S. Treasury notes and bills	\$ 10,986,639	\$ 9,539,113
GNMA pass-thru securities	-	27,366
Equity securities	4,356,657	4,894,915
Corporate bonds	<u>173,902</u>	<u>122,873</u>
	<u>\$ 15,517,198</u>	<u>\$ 14,584,267</u>

5. PROPERTY AND EQUIPMENT

Property and equipment consisted of the following at March 31:

	<u>2025</u>	<u>2024</u>
Land	\$ 165,905	\$ 165,905
Building	1,846,198	1,846,198
Building improvements	3,439,162	3,439,162
Furniture, fixtures, and equipment	715,772	715,772
Automobiles	314,225	314,225
Computer equipment	1,856,408	1,785,895
Construction in progress	<u>603,840</u>	<u>238,958</u>
	8,941,510	8,506,115
Less: Accumulated depreciation and amortization	<u>(4,590,489)</u>	<u>(3,896,218)</u>
Property and equipment, net	<u>\$ 4,351,021</u>	<u>\$ 4,609,897</u>

Depreciation and amortization expense amounted to \$694,270 and \$644,315 for the years ended March 31, 2025 and 2024, respectively.

6. LEASES

The Organization leases certain office spaces under operating leases that expire between June 2025 and June 2030, however the Organization has an option to extend the leases for up to 5 years.

The Organization has a finance lease that covers various copier, print and fax equipment through October 2029, at which time title will transfer to the Organization.

The components of total lease cost are as follows for the years ended March 31:

	<u>2025</u>	<u>2024</u>
Operating lease expense	\$ 943,859	\$ 938,429
Variable lease expense	(28,743)	18,455
Finance lease cost:		
Amortization of the right-of-use-asset	<u>42,575</u>	<u>42,575</u>
	<u><u>\$ 957,691</u></u>	<u><u>\$ 999,459</u></u>

Supplemental cash flow information related to leases are as follows for the years ended March 31:

	<u>2025</u>	<u>2024</u>
Cash paid for amounts included in the measurement of leases liabilities:		
Operating cash flows from operating leases	\$ 943,859	\$ 938,429
Financing cash flows from finance leases	<u>94,574</u>	<u>94,574</u>
Total	<u><u>\$ 1,038,433</u></u>	<u><u>\$ 1,033,003</u></u>
ROU assets obtained in exchange for lease obligations:		
Operating leases	<u>\$ -</u>	<u>\$ 73,787</u>
Total	<u><u>\$ -</u></u>	<u><u>\$ 73,787</u></u>

Other information related to leases is as follows as of March 31:

	<u>2025</u>	<u>2024</u>
Weighted-average remaining lease term:		
Operating leases	3.24 years	4.10 years
Finance leases	4.55 years	5.55 years

Weighted-average discount rate:		
Operating leases	2.49%	2.51%
Finance leases	4.21%	4.21%

6. LEASES (Continued)

The following summarizes the lease line items in the consolidated statement of financial position as of March 31:

	<u>2025</u>	<u>2024</u>
Finance leases:		
Property and equipment	\$ 425,746	\$ 425,746
Accumulated depreciation and amortization	<u>(120,508)</u>	<u>(42,575)</u>
Right-of-use asset - finance, net	<u>\$ 305,238</u>	<u>\$ 383,171</u>
Current portion of finance lease liabilities	\$ 81,501	\$ 78,147
Finance lease liabilities, net of current portion	<u>266,099</u>	<u>347,600</u>
Total finance lease liabilities	<u>\$ 347,600</u>	<u>\$ 425,747</u>

Maturities of lease liabilities as of March 31, 2025 were as follows:

For The Year Ending March 31:	<u>Operating</u>	<u>Finance</u>
2026	\$ 869,393	\$ 94,574
2027	752,359	94,574
2028	409,338	94,574
2029	93,318	94,575
2030	94,218	-
Thereafter	<u>27,778</u>	<u>-</u>
Total lease payments	2,246,404	378,297
Less: Interest	<u>(153,083)</u>	<u>(30,697)</u>
Total present value of lease liabilities	2,093,321	347,600
Less: Current portion of lease liabilities	<u>826,342</u>	<u>81,501</u>
Long-term portion of lease liabilities	<u>\$ 1,266,979</u>	<u>\$ 266,099</u>

7. 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.

8. 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 \$2,586,896 and \$2,432,357 for the years ended March 31, 2025 and 2024, 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.

The Pension Protection Act ("PPA") of 2006 was enacted as part of a comprehensive funding reform effort for multi-employer pension plans. The PPA further defined the funding rules of defined benefit pension plans and instituted certain requirements that were designed to identify and address financial problems associated with such plans. The PPA of 2006 created new funding classifications for multi-employer pension plans.

Under the PPA, plans are classified as one of the following four colors based on the plan's financial status:

Green (Safe):	A plan is generally in "safe" status if it is more than 80% funded.
Yellow (Endangered):	A plan is generally in "endangered" status if its funded percentage is less than 80% or if it has an accumulated funding deficiency for the current plan year or is projected to have an accumulated funding deficiency for any of the next six plan years.
Orange (Seriously Endangered):	A "seriously endangered" plan generally has a funded percentage of 70% or less.
Red (Critical):	A plan is generally in "critical" status if its funded percentage is less than 65% and it is not projected to improve its funded percentage over the next seven years; or, if a funding deficiency in excess of specified amounts is expected in the foreseeable future.

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

8. EMPLOYEE BENEFIT PLANS (Continued)

Pension Plan Summary (Continued)

The following table represents information about the Pension Plan as of and for the years ended March 31, 2025 and 2024, 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
				3/31/2025	3/31/2024		
SEIU Affiliates Officers and Employees Pension Plan	52-0812348 (001)	Green 12/31/23	Green 12/31/22	N/A	<u>\$ 2,586,896</u>	<u>\$ 2,432,357</u>	N/A 6/30/2026

Defined Contribution Plans

PEF also has two defined contribution plans covering all full-time employees with 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 \$451,133 and \$440,643 for the years ended March 31, 2025 and 2024, respectively.

9. 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: 65 years of age and three years of service; 55 years of age and ten years of service; or age plus years of service for a combined 80 years. 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 was again required to 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 was done for the entire Management/Confidential employee unit. As of July 1, 2023, PEF is now required to contribute a defined contribution of 4.0% of total gross compensation of the entire USWA bargaining unit into the Retiree Premium Fund for the period of July 1, 2023 until June 30, 2024, and each year thereafter. The same will be done for the entire Management/Confidential employee unit.

9. ACCRUED POSTRETIREMENT BENEFITS (Continued)

In 2024, PEF switched from a self-insurance health insurance plan to a fully insured health insurance plan, which provided an offsetting gain in the liability.

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 funded status reconciled with the amount shown in PEF's statements of financial position at March 31:

	<u>2025</u>	<u>2024</u>
Accumulated postretirement benefit obligation:		
Benefit obligation at beginning of year	\$ 16,407,458	\$ 11,730,598
Service cost	1,317,463	852,891
Interest cost	862,941	727,512
Plan amendment	-	4,122,524
Benefits paid	(645,296)	(568,189)
Recognition of actuarial gain	<u>580,214</u>	<u>(457,878)</u>
Benefit obligation at end of year	18,522,780	16,407,458
Fair value of plan net assets at end of year	<u>-</u>	<u>-</u>
Accumulated postretirement benefit obligation: in excess of plan assets	<u>\$ 18,522,780</u>	<u>\$ 16,407,458</u>

The net periodic postretirement health care benefit cost for the years ended March 31, 2025 and 2024 consist of the following components:

	<u>2025</u>	<u>2024</u>
Service cost	\$ 1,317,463	\$ 852,891
Interest cost	862,941	727,512
Amortization of prior service cost	<u>792,793</u>	<u>396,397</u>
Net periodic postretirement benefit cost	<u>\$ 2,973,197</u>	<u>\$ 1,976,800</u>

9. ACCRUED POSTRETIREMENT BENEFITS (Continued)

The amounts not yet recognized as components of net periodic benefit costs are as follows:

	<u>2025</u>	<u>2024</u>
Amounts not yet recognized as components of net periodic post-retirement cost:		
Actuarial loss	<u>\$ 2,766,124</u>	<u>\$ 2,267,124</u>
Total unrecognized amounts	<u>\$ 2,766,124</u>	<u>\$ 2,267,124</u>

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

Amortization of unrecognized actuarial gain	<u>\$ 3,069,094</u>
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The assumptions used in the measurement of the Organization's net periodic benefit costs and benefit obligations are as follows for the years ended March 31:

	<u>2025</u>	<u>2024</u>
Net periodic benefit cost for the year:		
Discount rate	5.11%	4.70%
Benefit obligation at year end:		
Discount rate	5.45%	5.11%

The service cost component of net periodic post-retirement benefit costs are included in operating expenses as part of administrative costs within other employee compensation costs. The other components of the net periodic post-retirement benefit costs are classified as non-operating expenses in the statement of activities and change in net assets.

Changes in Actuarial Assumptions

The following changes in actuarial assumptions have been implemented for the year ended March 31, 2025:

- The trend rates were updated to an initial rate of 8.50% (7.50% for Post-65) grading down to an ultimate rate of 4.00%. The select trend rates are updated to reflect the higher than anticipated rising healthcare costs environment.
- The discount rate was changed from 5.11% to 5.45%. The change in the discount rate resulted in a decrease in liabilities of approximately \$223,000.

All other methods and assumptions used in the actuarial valuation of the Organization's postretirement benefit plan as of March 31, 2025 are the same as those used during the prior period.

9. ACCRUED POSTRETIREMENT BENEFITS (Continued)

The following estimated benefit payments, which reflect expected future service, as appropriate, are expected to be paid during the years ended March 31:

2026	\$ 706,000
2027	801,000
2028	882,000
2029	923,000
2030	991,000
2031 to 2035	<u>6,124,000</u>
Total	<u>\$ 10,427,000</u>

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

10. BOARD DESIGNATED NET ASSETS WITHOUT DONOR RESTRICTIONS AND NET WITH DONOR RESTRICTIONS

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

	<u>2025</u>	<u>2024</u>
Divisions	\$ 971,381	\$ 1,208,840
Contract fightback	<u>6,977,308</u>	<u>6,612,905</u>
Total board designated net assets	<u>\$ 7,948,689</u>	<u>\$ 7,821,745</u>

Net assets with donor restrictions at March 31, 2025 and 2024 are available for the following purposes:

	<u>2025</u>	<u>2024</u>
COPE:		
Political Contributions	<u>\$ 88,831</u>	<u>\$ 94,224</u>

Changes in net assets with donor restrictions for the years ended March 31, 2025 and 2024 consisted of the following:

	<u>2025</u>	<u>2024</u>
COPE:		
Contributions received with donor restrictions	<u>\$ 294,078</u>	<u>\$ 247,081</u>
Net assets released from donor restrictions by incurring expenses satisfying the restricted purpose	<u>\$ 299,471</u>	<u>\$ 246,147</u>

11. COMMITMENTS AND CONTINGENCIES

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.

Supreme Court Ruling: Janus v. AFSCME

The U.S. Supreme Court ruled that the collection of financial core fees from nonmembers in the public sector is a violation of the First Amendment of the United States Constitution. At this time, the Organization is not aware of any lawsuits regarding the *Janus* decision that directly impact PEF.

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 2025. The Organization does not believe that any financial settlement would be material.

12. RELATED ORGANIZATIONS

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.

PEF incurs costs on behalf of the Program, which are billed to the Program. Included in other receivables at March 31, 2025 and 2024, are receivables from the Program of \$1,670,777 and \$1,278,713, respectively. Included in accounts payable at March 31, 2025 and 2024 are amounts due from PEF to the Program of \$0 and \$2,811, 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, 2025 and 2024 are receivables from the Retirees' Fund for \$109,342 and \$60,928, respectively. There were no payables due from PEF to the Retirees' Fund as of March 31, 2025 and 2024.

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, 2025 and 2024 are receivables from the PEF Relief Fund for \$84,978 and \$86,002, respectively.

13. FAIR VALUE MEASUREMENT

The following is a description of the valuation methodologies used for assets measured at fair value.

U.S. Government Treasury notes and bills – Fair value is based on the present value of the bond's or fund's future interest payments and the final value upon maturity.

Government National Mortgage Association (GNMA) pass-thru securities – Fair value is based on inputs corroborated from and benchmarked to observed prices of recent securitization transactions of similar securities with adjustments incorporating an evaluation of various factors, including prepayment speeds, default rates and cash flow structures. GNMA project loan bonds and mortgage-backed securities are categorized within Level 2 of the fair value hierarchy.

Equity Securities – Valued using Level 1 inputs at the quoted closing price reported on national exchanges and are available for withdrawal with one day notice.

Corporate Bonds – Valued using Level 2 inputs based on yields currently available on comparable securities of issuers with similar credit ratings. When quoted prices are not available for identical or similar bonds, the bond is valued under a discounted cash flows approach that maximizes observable inputs, such as current yields of similar instruments, but includes adjustments for certain risks that may not be observable, such as credit and liquidity risks.

Fair values of investments measured on a recurring basis at March 31, 2025 are as follows:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
U.S. Treasury notes and bills	\$ -	\$ 10,986,639	\$ -	\$ 10,986,639
Equity securities	4,356,657	-	-	4,356,657
Corporate bonds	-	173,902	-	173,902
	<u>\$ 4,356,657</u>	<u>\$ 11,160,541</u>	<u>\$ -</u>	<u>\$ 15,517,198</u>

Fair values of investments measured on a recurring basis at March 31, 2024 are as follows:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
U.S. Treasury notes and bills	\$ -	\$ 9,539,113	\$ -	\$ 9,539,113
GNMA pass-thru securities	-	27,366	-	27,366
Equity securities	4,894,915	-	-	4,894,915
Corporate Bonds	-	122,873	-	122,873
	<u>\$ 4,894,915</u>	<u>\$ 9,689,352</u>	<u>\$ -</u>	<u>\$ 14,584,267</u>

14. SUBSEQUENT EVENTS

Subsequent events have been evaluated through August 13, 2025, which is the date these consolidated financial statements were available to be issued.

CONSOLIDATING STATEMENT OF FINANCIAL POSITION
MARCH 31, 2025

	New York State Public Employees Federation	PEF Land Holding Corporation	Eliminations	Consolidated
ASSETS				
CURRENT ASSETS:				
Cash and cash equivalents	\$ 12,949,631	\$ -	\$ -	\$ 12,949,631
Investments	15,517,198	-	-	15,517,198
Membership dues receivable	726,006	-	-	726,006
Due from related parties and other receivables, net of allowance for credit losses of \$35,000 for 2025	2,474,582	-	-	2,474,582
Prepaid expenses	565,338	-	-	565,338
Total current assets	32,232,755	-	-	32,232,755
PROPERTY AND EQUIPMENT, NET	4,184,396	166,625	-	4,351,021
OTHER ASSETS:				
Operating lease right-of-use assets	2,233,718	-	-	2,233,718
Investment in PEF Land Holding Corporation	166,625	-	(166,625)	-
Restricted cash	88,831	-	-	88,831
Deposits	321,748	-	-	321,748
Total other assets	2,810,922	-	(166,625)	2,644,297
Total assets	\$ 39,228,073	\$ 166,625	\$ (166,625)	\$ 39,228,073
LIABILITIES AND NET ASSETS				
CURRENT LIABILITIES:				
Accounts payable	\$ 391,847	\$ -	\$ -	\$ 391,847
Current portion of finance lease liability	81,501	-	-	81,501
Current portion of operating lease liabilities	854,866	-	-	854,866
Employee organizational leave	266,675	-	-	266,675
Other accrued liabilities	2,384,667	-	-	2,384,667
Accrued vacation	1,066,922	-	-	1,066,922
Total current liabilities	5,046,478	-	-	5,046,478
LONG-TERM LIABILITIES:				
Finance lease liability, net of current portion	266,099	-	-	266,099
Operating lease liabilities, net of current portion	1,552,451	-	-	1,552,451
Accrued post-retirement benefits	18,522,777	-	-	18,522,777
Total long-term liabilities	20,341,327	-	-	20,341,327
Total liabilities	25,387,805	-	-	25,387,805
NET ASSETS WITHOUT DONOR RESTRICTIONS:				
Designated by board	7,948,689	-	-	7,948,689
Post-retirement costs recognized in net assets	(2,766,124)	-	-	(2,766,124)
Undesignated	8,568,872	166,625	(166,625)	8,568,872
Total net assets without donor restrictions	13,751,437	166,625	(166,625)	13,751,437
NET ASSETS WITH DONOR RESTRICTIONS	88,831	-	-	88,831
TOTAL NET ASSETS	13,840,268	166,625	(166,625)	13,840,268
Total liabilities and net assets	\$ 39,228,073	\$ 166,625	\$ (166,625)	\$ 39,228,073

NEW YORK STATE PUBLIC EMPLOYEES FEDERATION AND SUBSIDIARY

Schedule II

**CONSOLIDATING STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS
FOR THE YEAR ENDED MARCH 31, 2025**

	New York State Public Employees Federation	PEF Land Holding Corporation	Eliminations	Consolidated
CHANGES IN NET ASSETS WITHOUT DONOR RESTRICTIONS:				
REVENUE, GAINS, AND OTHER SUPPORT:				
Membership dues	\$ 44,381,800	\$ -	\$ -	\$ 44,381,800
Less:				
Divisional distributions	1,498,908	-	-	1,498,908
Per capita taxes, net of rebates	10,127,645	-	-	10,127,645
Affiliation dues	331,945	-	-	331,945
Net membership dues	32,423,302	-	-	32,423,302
OTHER SUPPORT:				
Interest and dividend income	566,869	-	-	566,869
Grant income	606,700	-	-	606,700
Advertising income, net	1,350	-	-	1,350
Rental income	-	125,776	(125,776)	-
Other income	1,400,424	-	-	1,400,424
Net loss of subsidiary	(56)	-	56	-
Total other support	2,575,287	125,776	(125,720)	2,575,343
NET ASSETS RELEASED FROM RESTRICTIONS:				
Satisfaction of program restrictions	299,471	-	-	299,471
Total revenues, gains, and other support	35,298,060	125,776	(125,720)	35,298,116
EXPENSES:				
Salary and benefit expenses	23,093,113	-	-	23,093,113
Staff travel and related expenses	870,866	-	-	870,866
Program related expenses	3,360,386	-	-	3,360,386
Operating expenses	5,968,090	125,776	(125,776)	5,968,090
Depreciation	694,214	56	-	694,270
Total expenses	33,986,669	125,832	(125,776)	33,986,725
CHANGES IN NET ASSETS FROM OPERATIONS	1,311,391	(56)	56	1,311,391
NON-OPERATING EXPENSES:				
Other components of net periodic post-retirement expense	(862,941)	-	-	(862,941)
Investment gains, net	659,782	-	-	659,782
CHANGE IN NET ASSETS BEFORE OTHER CHANGES IN NET ASSETS	1,108,232	(56)	56	1,108,232
OTHER CHANGES IN NET ASSETS:				
Post-retirement charges other than net periodic benefit costs	(499,000)	-	-	(499,000)
TOTAL CHANGE IN NET ASSETS WITHOUT DONOR RESTRICTIONS	609,232	(56)	56	609,232
CHANGES IN NET ASSETS WITH DONOR RESTRICTIONS				
Contributions	294,078	-	-	294,078
Net assets released from restrictions	(299,471)	-	-	(299,471)
TOTAL CHANGE IN NET ASSETS WITH DONOR RESTRICTIONS	(5,393)	-	-	(5,393)
TOTAL CHANGE IN NET ASSETS	603,839	(56)	56	603,839
NET ASSETS - beginning of year	13,236,429	166,681	(166,681)	13,236,429
NET ASSETS - end of year	\$ 13,840,268	\$ 166,625	\$ (166,625)	\$ 13,840,268

The accompanying notes are an integral part of these schedules.

NEW YORK STATE PUBLIC EMPLOYEES FEDERATION AND SUBSIDIARY

Schedule III

CONSOLIDATED SCHEDULE OF EXPENSES FOR THE YEARS ENDED MARCH 31, 2025 AND 2024

	<u>2025</u>	<u>2024</u>
SALARY AND BENEFIT EXPENSES:		
Salaries	\$ 13,329,429	\$ 12,304,042
Health insurance	4,352,102	3,813,686
Pension expense	2,586,896	2,432,357
Payroll taxes	1,159,575	1,081,092
Union leave	930,870	462,791
401(k) plan	451,133	440,643
Term life insurance	144,503	135,301
Long-term disability	54,801	52,752
Dependent care	55,200	53,014
Tuition reimbursement	28,604	-
	<u>28,604</u>	<u>-</u>
Total salary and benefit expenses	<u>\$ 23,093,113</u>	<u>\$ 20,775,678</u>
STAFF TRAVEL AND RELATED BENEFITS:		
Automobile expense	\$ 295,534	\$ 216,722
Staff travel	<u>575,332</u>	<u>623,333</u>
Total staff travel and related benefits	<u>\$ 870,866</u>	<u>\$ 840,055</u>
PROGRAM RELATED EXPENSES:		
Employee organizational leave	\$ 555,126	\$ 427,320
Program related travel	<u>2,805,260</u>	<u>2,563,405</u>
Total program related expenses	<u>\$ 3,360,386</u>	<u>\$ 2,990,725</u>

The accompanying notes are an integral part of these schedules.

NEW YORK STATE PUBLIC EMPLOYEES FEDERATION AND SUBSIDIARY

Schedule IV

**CONSOLIDATED STATEMENTS OF OPERATING EXPENSES
FOR THE YEARS ENDED MARCH 31, 2025 AND 2024**

	<u>2025</u>	<u>2024</u>
OPERATING EXPENSES:		
Professional and consultant fees	\$ 1,436,899	\$ 1,387,607
Office rent and parking	1,136,854	1,124,107
Computer fees	630,718	474,870
Advertising	409,763	533,439
COPE expense	299,471	246,147
Political and associated contributions	265,115	175,600
Arbitration	230,917	239,365
Insurance	226,496	239,006
Postage	186,812	204,890
Telephone and communications	179,442	184,292
Office supplies	126,249	135,219
Utilities	121,423	110,139
Janitorial	120,823	115,530
Outside temporary hires	105,697	66,926
Books and reference material	90,338	83,094
Maintenance and repairs	85,463	105,718
Printing	74,238	158,163
Charitable and other contributions	70,268	41,341
Scholarships	46,100	46,700
Steno and transcript fees	45,070	41,203
Reproduction	30,970	37,523
Minor equipment purchases	26,820	24,393
Interest expense	16,427	9,703
Credit loss expense	10,000	-
Outside legal fees	3,455	-
Photographic supplies	-	143
Real estate taxes	(28,743)	18,455
Miscellaneous	21,005	8,351
	<u>\$ 5,968,090</u>	<u>\$ 5,811,924</u>

The accompanying notes are an integral part of these schedules.



August 23, 2025

Group shot of the leaders attending the Region 11 Leadership Conference.



August 30, 2025

It's PEF Day at Citi Field! Let's go Mets!



August 1, 2025

Members at Pilgrim Psychiatric Center in Suffolk County stopped by the PEF table for the latest union updates.

July 31, 2025

Members of PEF Division 281 (DOL, Southern Tier) enjoyed a Member Appreciation Night, with BBQ chicken and ice cream on a hot summer day!



July 25, 2025

PEF members from Division 403 OPWDD Valley Ridge CIT, Division 237 Oxford Vets Home, and Division 197 OPWDD Norwich Day Habilitation Services met to discuss civil service developments and upcoming contract negotiations. Other important topics included health and safety resources and benefits for members. Members were joined by local division leaders, VP Randi DiAntonio, Region 5 Coordinator Scott Staub, and field and organizing staff.



July 13, 2025

Shout out to PEF Region 4 for hosting an amazing Clambake at the Spinning Wheel. 200 people attended the event, which featured over a dozen door prizes and raffles. Thanks to Region 4 Coordinator Monica Moore and her office team for organizing a great event and bringing members together in solidarity!



July 31, 2025

PEF Region 12 Coordinator Corinne Testa, along with Executive Board Members (and council leaders) Amy Lee Pacholk and Ivan Giannou joined retiree Michael Klopkin and President Spence (not pictured) for the annual Constitutional Convention of the Long Island Labor Federation.

August 12, 2025

VP Randi DiAntonio, Regional Coordinator Leisa Abraham, and PEF staff spent time at the Workplace Violence Prevention table with Division 180 PMH Buffalo Psych Center members.





August 21, 2025

Opening Day at the NYS Fair! We had the pleasure of speaking with members from all over the state and learned about important programs they are involved with.





Letters to the Editor

Sending letters to the editor is a powerful way for members to get answers to their questions, express their opinions, and contribute to public discourse. They can raise awareness, spark dialogue, and influence public opinion on various issues.

We want to hear from you!

Send your letters to to thecomunicator@pef.org. Please include your name and location. Letters may be published in upcoming issues of *the Communicator*.

