



January/February Volume 84, Issue 1 2024

• COMMUNICATIONS WORKERS OF AMERICA AFL-CIO • LOCAL 13000 NEWS • THE UNION FOR THE INFORMATION AGE •

Journal of Local 13000 IN THIS ISSUE

- Message from the President
- Local 13000 Convention Update
- In Memoriam
- Women's View: Work-Life Balance
- 2023-24 Rosie the Riveter Nomination
- 2024 Scholarship Essay Contest
- The Local Buzz
- Western Region
- Eastern Region
- Grey Matters: Verizon Survivor to Do List
- Financials



Message from the President

When we closed out 2023 a number of our members exercised an option that we all hope to achieve one day and that is the opportunity to retire and move on to the next chapter in our lives with our families. We wish all the retired members the best in retirement and hope they get to enjoy it for many more years to come.

Usually as we close out each year we see a decline in membership as a result of this attrition of membership, but unlike years in the past this year is different. Several of our employers have been hiring new employees into the companies where we represent the workforce. Some of these hires are a result of negotiated obligations the employers have with the union and others are a result of legislation and funding that we have pushed for that has been made available to provide necessary broadband access to unserved or underserved areas across the state.

This funding has led to increased workload and the ability for our employers to provide access to services that otherwise might never have been available. Our Local and District offices have been directly involved in conversation with employers, elected officials and state authorities who are responsible for overseeing these types of projects in Pennsylvania. CWA has lobbyists working on our behalf in Harrisburg to keep us in the loop on any updates and to also voice our concerns with the administration. The hiring of these new employees will be essential in not only keeping up with the current workload, but it will also be



essential in keeping up with the work that will soon be performed as a result of the "Infrastructure Investment and Jobs Act."

Initially we had anticipated we would begin seeing this work begin in the 1st or 2nd quarter of 2024, but now it appears more likely that this work will not begin until the later part of the year or the beginning of 2025.

With that being said there is still money being utilized in the state from the "American Rescue Plan Act." This funding is currently being used by a number of employers across the state and should continue throughout the remainder of 2024. We look forward to providing these services to the residents of the state and welcome the continued growth of our membership.

Also, as we enter 2024, we welcome all our newly elected officers and Unit officials. We are currently looking to set dates for training across the state and will be working with the Local and District to coordinate these activities. Please keep in touch with your Regional offices for updates on these training sessions.

Our District 2-13 Vice-President Mike Davis has secured funding to help defray some of the costs associated with this training so that will be helpful for all the Locals throughout the District.

Mike has been working tirelessly in his new role as our District 2-13 Vice-President and has been on the go traveling throughout the District since taking over this role in July. He is still in the process of securing the necessary staff in our

(continued on page 2)



Message from the President

(continued from page 1)

District and should have the remaining hires in place before the end of the 1st quarter of 2024.

Finally, the Local has been looking at ways to reduce expenses in our daily operations. Newly elected Secretary Treasurer Joe Smolczynski has reached out to several of our vendors to discuss the terms of our active contracts and negotiate new terms when they expire to provide additional savings to the Local. He is also exploring some other options to bring some services back in-House that we can handle right here at the Local and thus further reduce expenses. We will continue to look and identify cost cutting measures within the Local as long as it does not diminish the services that we provide to the membership.

In Unity,

James J. Gardler
President CWA Local 13000

LOCAL 13000 CONVENTION UPDATE

Please be aware that the cut-off date for Proposed Amendments to the By-Laws and Rules of Local 13000 is March 13, 2024.

IN MEMORIAM

Herbert J. Bieber-Retiree

Unit 33 , Branch 01
Deceased December 24, 2023

Lemuel Vaughan-Retiree

Unit 21, Branch 04
Deceased December 16, 2023

Karen DelSanto-Retiree

Unit 32, Branch 04
Deceased December 21, 2023

Michael J. Clarke-Retiree

Unit 21, Branch 04
Deceased December 02, 2023

Stanley J. Parker-Retiree

Unit 25, Branch 06
Deceased December 27, 2023

Martin G. Kleinschmidt-Retiree

Unit 21, Branch 10
Deceased December 28, 2023

John Umstead-Retiree

Unit 33, Branch 06
Deceased December 28, 2023

Eric Pinkstone-Retiree

Unit 23, Branch 01
Deceased November 24, 2023

Gary M. Hunt-Retiree

Unit 21, Branch 05
Deceased November 30, 2023

Tracey Adams, Jr-Member

Unit 32, Branch 09
Deceased January 07, 2024

David Dool-Retiree

Unit 21, Branch 01
Deceased November 30, 2023

Marco F. Roman-Retiree

Unit 33, Branch 01
Deceased January 21, 2024



(ISSN:1050-0154)

CWA Local 13000 Executive Office
2124 Race Street, 3rd Floor
Philadelphia, PA 19103
215-564-6169
Volume 84, Issue 1



EXECUTIVE BOARD

James J. Gardler
President

Jeff C. Reamer
Executive Vice President

Joe Smolczynski
Secretary –Treasurer

Richard R. Dezzi
Vice President, Eastern Region

Gregg Bialek
Vice President, Western Region

CWA 13000 NEWS is published bi-monthly by Local 13000, CWA, AFL-CIO. CWA Local 13000 Executive Board offices are located at 2124 Race Street, Third Floor, Philadelphia, PA 19103. Telephone (215) 564-6169. CWA 13000 NEWS business and editorial offices are located at the same address.

Subscription Rates: Of the amount paid as annual dues to CWA Local 13000, \$5.00 is paid as a year's subscription to CWA 13000 NEWS. To other than active members, \$10.00 per year in advance. Members have the privilege of expressing their views, but all articles must be signed. Articles detrimental to the Union will be subject to review by the Executive Board. Second-class postage paid at Philadelphia, Pennsylvania. Postmaster: Send address changes to: CWA 13000 NEWS, CWA Local 13000, AFL-CIO, 2124 Race Street, Third Floor, Philadelphia, PA 19103.

James J. Gardler, Editor **Elaine Bell, Assistant Editor**





Women's View



BALANCE

The idea of work-life balance largely emerged during the widespread take-up of the eight-hour workday in the early 20th Century. Work-life balance was something workers fought for through organizing and striking. As workers won the right to an eight-hour workday, work-life balance was not explicitly labelled as such and was commonly defined as the ability to compartmentalize job tasks and life. Since the pandemic, work-life balance has gotten even more blurred. The definition of work-life balance has changed dramatically throughout the past several years, with the demise of strict 9-to-5 hours and an increase in remote work.

For many workers, this cut-and-dry barrier eroded as new technology arose at the turn of the millennium. As the internet, email and eventually smartphones found their way into the workplace, people were reachable at all times creating no downtime for the employee. It eventually became quite ideological, this idea that being busy, being constantly available, makes you a really good worker.

Many workers are not only rethinking their careers but are leaving them altogether. That's due to everything from the ongoing pandemic to burnout to seeking out better pay and benefits. It is becoming increasingly clear that flexibility may be the greatest incentive of all, and that goes beyond just being able to work remotely. Surveys done

in 2021 show almost 70% of workers want a career change. Workers now more than ever want work-life balance over higher pay. Millennial and Gen Z workers make up more than half the 50 million people that left their jobs in 2022 and more than half of the 48 million that left their jobs in 2021. It shows yet again how workers are re-prioritizing what they want out of work.

Employers are scrambling to attract workers and outbid each other for talent while Unions are trying to better their contracts in the hope of retaining workers at the businesses they have organized. The pandemic is shaping a new hi-flex economy, where flexibility is the name of the game. Jobs, leisure, restaurants, and everything else that powers the economy, will need to adapt to workers and consumers who have rethought what they want out of the ways they make and spend money.

This is a very important time for working Americans where they need to form a Union in their workplace to continue to fight for a better work-life balance. As history has proven, the labor movement was a major force in making positive changes, as well as, making safe work environments for working Americans. If you know someone who is interested in forming a Union at their workplace, please reach out to your Regional Office or Executive Office.

2023-24 ROSIE THE RIVETER NOMINATION

NOMINEE INFORMATION

NAME: _____ PHONE: _____ UNIT: _____ BRANCH: _____

MEMBER NOMINATING CANDIDATE

NAME: _____ PHONE: _____ UNIT: _____ BRANCH: _____

The Rosie the Riveter Award was created in 2005 to recognize an exceptional woman who exhibits a strong commitment to Unionism and who is actively involved in Local 13000

1. Why are you nominating this candidate for this award? Please be specific of how she is involved in her Union.
(example: Offices held, committees served on, other duties)

2. Please attach a separate sheet listing any compelling reasons as to why this person should receive this award.
(This brief essay is an important part of the selection process)

Please fill out all questions in their entirety. Return form by fax, mail, or email no later than April 1, 2024 to:

CWA Local 13000
ATTN: Women's Committee
2124 Race Street, 3rd FL
Philadelphia, PA 19103
215-564-2520 (Fax)

The recipient of the award will be announced at the CWA Local 13000 Convention in May 2024.



2024 Scholarship Essay Contest

The Pennsylvania AFL-CIO Scholarship Essay Contest is a chance for students to learn more about the importance of Organized Labor in America.

Over the years, we have awarded tens of thousands of dollars to students furthering their education.

Scholarships are available exclusively to Pennsylvania AFL-CIO affiliated union members and their families.

Scholarships are offered to students in two categories: graduating high school seniors (Class of 2024), and all post-secondary students.

Essay Contest Categories

Unions have helped people gain economic security through good wages, strong benefits, and fairness in the workplace. The benefits of union membership are particularly important for those working to provide a better life for their families in a post-Covid world.

Category 1: Graduating High School Seniors

What has COVID revealed about the division of labor in our country and what we constitute as essential workers?

Category 2: Post-Secondary Students

How would a \$15 minimum wage impact different parts of our economy? You may consider the impact on low-wage workers, on families, on small businesses, on large corporations, and on the government.



Scholarship Awards

First Place	\$2,000
Second Place	\$1,500
Third Place	\$1,000

How to Apply

- Essays must be a minimum of 1,500 words on the topic in your respective category. Essays less than 1,500 words will not qualify.
- Titles must include the Category for which you are applying.
- Your application form (located on the back of this flyer) must be included in your essay PDF file, or as a separate PDF attachment.
- Entries must be sent to percapita@paaficio.org by March 29, 2024.

The PDF version of this flyer is on www.paaficio.org

DEADLINE FOR SUBMISSIONS IS MARCH 29, 2024



THANK YOU TO OUR 2023 DONORS!

AFSCME Local 2234	Butler CLC	IAMAW Local 1842
UMWA District 2	Bricklayers & Allied Craftworkers	USW Local 14693
BCTC of Reading	CWA Local 13000	Bucks County CLC
CBTU Southeast PA	IBEW Local 5	IBEW Local 1319
IBEW Local 29	IBEW Local 81	IBEW Local 56
IBEW Local 712	Laborers Local 1058	IBEW Local 827
IUEC Local 84	Pittsburgh BCTC	Lehigh Valley CLC
Neshaminy Federation of Teachers	SEIU Local 668	Pittsburgh Metro APWU
Roofers Local 37	Teamsters Local 205	SMART Local 44
Steamfitters Local 420	Unite Here Local 54	Teamsters Local 773
UA Local 690	USW Local 1165	USW District 10
USW Local 10-234	IBEW Local 126	USW Local 9455
AFGE Local 1916	IUPAT District Council 57	Indiana-Armstrong CLC
IUOE Local 542	IUOE Local 66	LIUNA Local 332

If you have questions:

***Please contact Monica Virgilio
at 717-231-2853, or email
percapita@paaficio.org***

**PLEASE COMPLETE THE APPLICATION BELOW AND
INCLUDE IT WITH YOUR ESSAY SUBMISSION**

NAME

ADDRESS

HOME PHONE NUMBER

EMAIL ADDRESS

UNION AFFILIATION & LOCAL

CENTRAL LABOR COUNCIL (if known)

PLEASE STATE THE NAME & ADDRESS OF THE SCHOOL AND/OR PROGRAM YOU CURRENTLY ATTEND

☐ I agree to provide proof of school acceptance or enrollment, should I become a scholarship recipient.

SIGNATURE OF CENTRAL LABOR COUNCIL OR LOCAL UNION

The Local Buzz The Local Buzz The Local Buzz



*Report of Executive
Vice President,
Jeff Reamer*

VERIZON

On January 10, 2024 a meeting was held between the Local 13000 Executive Board and Matt Noren, the new VP of Network and Field Operations, along with his full Director team. The purpose of the meeting was to review the outlook for Verizon's plans in 2024. The main topic of discussion was focused on the future broadband buildout plans across the State of PA by way of Verizon looking to take advantage of the Infrastructure funding included in the legislation that President Gardler referred to in his article. Talks were also held surrounding the renewal of the Philadelphia Franchise Agreement, potential future staffing plans, issues with vacations and tours when dealing with Capacity management and the results of the Company's pulse survey. Overall the meeting was a positive step for both sides to work together and keep the lines of communication open, which is a new welcomed outcome. ■

COMCAST (Alle-Kiski)

Bargaining continued through the last months of 2023 for our Unit 119 members at Comcast Alle-Kiski. While most issues at the table have been resolved, economics continue to be the hurdle that prevents an agreement from being reached. The company's insistence on undervaluing and failing to recognize our members' contributions as it relates to the success of this Company continues to be a sticking point at the table.

After countless months of bargaining beyond the original contract expiration date of May 21, 2023, wages continue to be the contentious issue at the table. Regardless, your bargaining team is steadfast in its goal to settle for nothing less than a fair agreement for our membership. The next bargaining dates with the Company are set for the end of February. ■

COMCAST (South Hills)

Our Unit 115 members at Comcast South Hills have continued bargaining well past the original contract expiration date of November 6, 2023. And despite the timespan between original expiration and today's date not being as long as that seen by their fellow Unit 119 members involved in bargaining at Alle-Kiski, the common denominator to reaching a fair agreement remains the same, the unsatiable GREED of Comcast, in the form of not valuing its employees and not recognizing that everything the company enjoys in terms of customer loyalty is a direct result of the dedication of our membership. The last bargaining dates with the Company were held on January 9th and 10th and bargaining scheduled to resume on February 6th, 7th and 8th. Members are urged to stay in contact with Union officials for updates and actions needed going forward. ■

AMERICAN REDCROSS

Despite the December 31, 2024, contract expiration date, an agreement was made with the Company to enter into early bargaining. As a result, bargaining surveys have already been sent out and received back by the membership to ensure our bargaining committee's agenda is set and identifies those priorities identified by the membership. While no concrete bargaining dates have been set with the Company at the time this article was written, the anticipated timeframe for the opening of



The Local Buzz The Local Buzz The Local Buzz

bargaining is in the early April timeframe. Updates on bargaining will be relayed to the membership as events unfold. ■

EVERYACTION/BONTERRA

In late 2023, the Company announced its intention and wishes to alter both the commission and bonus plans that our membership is compensated through today. While the Company does recognize that this change in working conditions must be bargained with and accepted by the Union, the Company's Compensation department has had scheduling conflicts and was unable to meet with the Union, despite available dates given for discussions by the Union. These discussions are now scheduled to be held on February 7, 2024. Updates surrounding these discussions will be relayed to the membership in real time. ■

FAST MAIL

Our congratulations go out to our newest CWA Local 13000 members from Fast Mail. Fast Mail is a software company, whose Australian workforce is unionized, however the Company declined to recognize their U.S. workforce through voluntary recognition under the NLRB. Nonetheless, our newest members fought for and won their right to have a voice in the workplace in an NLRB Representation election held on Thursday February 1, 2024. The next step in their quest for their workplace justice will be to begin bargaining for a first contract. Bargaining preparations have already begun and we anticipate the onset of the next step in their journey. They will have the full support of every member of this Local behind them in this fight. It would be an injustice not to recognize and thank District 2-13 Organizing Coordinator, Terry Garner and former Local 13000 Organizer, now Local Secretary-Treasurer, Joe Smolczynski, for their hard work and dedication in supporting these members in their fight to become CWA! ■

NEWTOWN TOWNSHIP (Firefighters)

In late December of 2023, notice was received from the Township informing the Union that they wished to invoke the bargaining re-opening language contained in the CBA surrounding changes to the existing scheduling language. These potential changes are a result of the Township's application being approved for a grant from the State of Pennsylvania that provides for a 3-year annual wage reimbursement for the hire of 4 additional full-time firefighters. As a result, the Township announced it is looking to expand the existing 5-day work week to a 7-day workweek. Bargaining talks with the Township, that are isolated to this specific schedule expansion issue, began on January 12, 2024. Talks have continued through the month of January and have continued into February. On February 1, 2024, the Union Bargaining team gave a comprehensive counter proposal to the Township and is awaiting a response. The next bargaining meeting between the parties is now scheduled for February 16, 2024. Updates on bargaining will be relayed to the membership through elected Union Officials in real time as events unfold. ■

2024 Contract Expiration Dates

Windstream- Brookville, Enon Valley, Knox-
Unit 103 - 9/30/2024

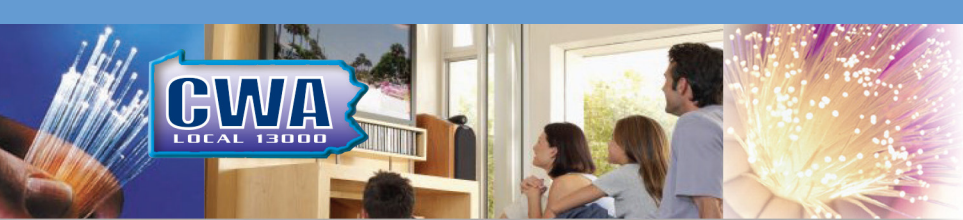
Windstream- Kittanning, Murrysaville-
Unit 103 - 9/30/2024

Windstream- Ridgway- Unit 103 - 9/30/2024

Windstream- Muncy, Lansford-
Unit 103 - 9/30/2024

Newtown Township Firefighters-
Unit 25 - 12/31/2024

American Red Cross - Unit 111- 12/31/2024



WESTERN REGION UNIT PRESIDENTS

Unit 31	Mike Bowman	Unit 57	Bob Gourdie
Unit 32	Mike Reeder	Unit 59	Andy Miller
Unit 35	Anthony D'Angelo	Unit 101	Joseph Kopec
Unit 41	Justin Felt	Unit 103	Patrick Catalano
Unit 42	James Stiffey	Unit 111	Jaytricia Tremel
Unit 43	Troy Scott	Unit 115	Mark Onofrey
Unit 44	Chris Meyers	Unit 116	Justin Voelker
Unit 54	Dana Bialek	Unit 119	Jamie Fetterman
Unit 56	Dan Murphy		

Western Region



Happy New Year to everyone. I hope the first month of the year has been good for everyone. This year, in the Western Region, has been off to a running start for us here.

Verizon grievances were heard in early January and we have another meeting scheduled in February to get everything completed to stay current. We have won several grievances at the labor level due to the great work your representatives have been doing to compile the information that I need to put on a great case. Please make sure that you give ALL information when giving a grievance to your representative and have the grievance form filled out completely with as much detail as you can.

Surveys for American Red Cross have been compiled. We had a membership meeting on Sunday January 21, 2024 to discuss all of the responses to the survey. Along with this, your Unit 111 President Jaytricia Tremel, covered all the dates and how we are going to proceed with bargaining. For updates, please follow on Facebook **CWA members working in GAR** or see your local representative.

Comcast bargaining, well what can I say about it. As usual they are dragging their feet with the Alle-Kiski group (Unit 119). We have been on economics for a few months now with little movement from the company. The company leaders at the table do not seem to care about rising costs of everything out there right now. Food, gas, utilities, everything is costing us more and more. This company makes billions every year and wants to give its members pennies on the dollar for increases. It is time to let them know you are NOT happy about this. We have dates for the end of February to meet with them again to try and get this finished. We will not give up until we get every member here a good increase. Please reach out to a representative to see

what you can do to help us put pressure on this company. Updates will be posted on the Local 13000's Facebook page along with the Unit 119 Facebook page.

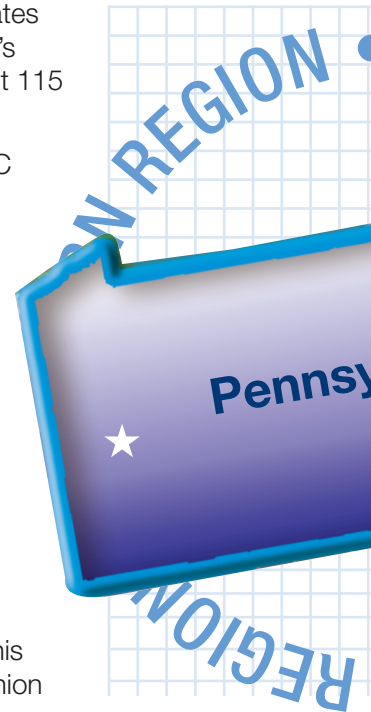
Comcast South Hills (Unit 115), their bargaining started a little later than Alle-Kiski but we are just hitting economics there. This is going to be the same tough road but with membership support and having the members help by putting some pressure on the company locally, hopefully we can get them advanced quickly to where we are at with Alle-Kiski; we have bargaining dates in the beginning of February. Updates will be posted on the Local 13000's Facebook page along with the Unit 115 Facebook page.

Consolidated Communication ILEC contract books are here. We are looking to get them distributed at the next membership meeting, so please make sure to attend.

Broadband buildout is here. Verizon and other companies that we represent have been putting in bids to get this work. There are strict guidelines with prevailing wages and other items that must be followed in order to get these bids. This will all help to get this work to our represented members. As we win these bids this is guaranteed work for all of our union sisters and brothers. For our Western region this will be great to secure our future. ■

In Unity,

Gregg Bialek
Western Region Vice President



EASTERN REGION UNIT PRESIDENTS

Unit 1	George Balzer	Unit 23	Duke McShane
Unit 11	Jaime Schools	Unit 25	Dave Gain
Unit 13	Charlie Butz	Unit 33	Craig Brasten
Unit 14	Orland Jones	Unit 34	Daisy Ellerbee
Unit 15	Chris Wackerman	Unit 37	Dave Baker
Unit 21	Larry Windstein	Unit 211	Megan Bach
Unit 22	Joseph Peruggia		

CWALOCAL13000NEWS



Eastern Region



Around the Region

It is a new year and as I have stated in previous articles, it is important to start the year off right. Members must make sure that overtime lists are posted and available, and the lists must be accurate with

phone numbers, qualifications, and an updated schedule. Additionally, qualifications that are on the overtime list should be kept current, and most importantly if you are not being called or considered for overtime because you are not trained then you need to inform your supervisor. With all the technology available for management to use, it boggles my mind to hear that people are being called for overtime while on vacation, benefits, or getting skipped for overtime opportunities when they are available. Discussions have been ongoing to solve the problem, but it has stalled since two directors have been replaced in the past two months. My office has every intention of having management fix the problem so that the integrity of the overtime list is preserved.

In the past, the Company has created, merged, blended, and dissolved administrative groups under the guise of Article 39. The Union is fully aware of the implications of Article 39 and it is always our intent "to bargain about the composition of the group, the scheduling of tours, overtime procedures, and vacation selection procedures". This article is the Company's opportunity to devise administrative groups as they see it and in many circumstances, the Union has refuted the company's intent to make changes to administrative groups for many reasons.

It is the objective of the Union that if an agreement is reached it adheres to "economy of operation, good customer service, fairness to all employees in the group and consideration to the employees' wishes. Any agreement on overtime procedures must have a goal of accomplishing a reasonably equal distribution of overtime opportunities among all of the qualified employees in the group". When this is not accomplished there is no agreement but the Company can impose it in 30 days which is usually the case. Over the years, The Union has had meetings with management to broker better circumstances and will continue to do so when it is a burden to our members.

The vacancy for the District 2-13 staff representative has been filled by CWA Local 13000 member Jason Pakech and I was able to review every grievance that was sent to the District Office from my office for arbitration consideration. The purpose was to review and evaluate each grievance based on the merits of the case. Some cases may have been an issue at the time that it was processed but have since resolved themselves or are no longer an issue for various reasons. My office intends to be able to provide updates to any grievant in terms of scheduling, such as the member's retirement or who has become deceased. If you are seeking an update please contact your Union Representative, Unit President, or the Eastern Region Office to speak with me and I will provide an update.

Finally, the Company has filled positions in the Fiber Customer Solution Analyst position in Philadelphia and Services Technicians in Allentown, Coatesville, Colmar (Line Lexington), Honesdale, Malvern, Norristown, Quakertown, and Spring City (Parkerford). More requisitions are being put in the system for more jobs and that is great news. ■

In Unity,

Richard R. Dezzi
Eastern Region Vice President

Grey Matters

I hope this article finds everybody happy and healthy in 2024. The holidays were a stressful time and unfortunately, we had quite a few members pass away during this time. We've received a lot of calls from members and spouses about who to call and what steps to take moving forward.

Losing a loved one is never easy and dealing with grief makes this process that much harder. So, Tom Miller Chapter President of RMC 13033 put together a checklist of whom to contact during this tragic time. Not an article I wanted to write but a necessary one for those grieving trying to negotiate their way through the many agencies that have to be contacted.

Thanks again Tom Miller

In Solidarity Mark Boehmer RMC 2-13 VP.

Verizon Survivor to Do List ✓

No one lives forever, and sooner or later we will leave behind a loved one and they will be faced with the daunting task of settling your estate. These are some guidelines to help them get through this process. Putting your insurance policies, bank account details and passwords, 401K, and direct deposit information in one folder and making sure someone knows where it is will make this transition easier.

- ✓ Survivor must call the benefit office to report a death. (1 855 489 2367) Ask them to start the process to collect pension. Ask them to notify Prudential regarding basic life insurance and supplemental life insurance. Ask them to look into the grandfathered death benefit. Company life insurance is one year's salary at retirement and gradually drops to 50% at age 70. Not taxable. The benefit office will know if there was a survivor option (only with a monthly pension) and if the member was entitled to the grandfathered death benefit. (Can only go to the current spouse or dependent child). Death benefit is taxable.
- ✓ Call Fidelity and request paperwork to transfer 401k into beneficiary's name if applicable.
- ✓ Call each fund or insurance company and request paperwork to transfer funds to beneficiary's name
- ✓ Call insurance company if deceased had life insurance other than through Verizon. and request claim form
- ✓ Call Computershare (877-373-6374) to see if deceased had any stocks there. If jointly owned they can be transferred with just a form, if not probate is required
- ✓ Call credit card companies if deceased had credit cards in only their name there may be a life insurance policy that would pay off the balance.
- ✓ Medical coverage continues for survivor for one year after date of death then cobra will be an option.

Our plan's cobra cost is very competitive for excellent coverage. Pre Medicare participants will pay more. Dental benefit ends at end of month of death.

The best advice is to have a good financial advisor as part of your plan to assist with this process. If you already have a financial advisor, ask if they can help with estate settlement. For any retiree related questions contact:

CWA Retiree Health Care Benefits Coordinator (RHBC)

Tom Ballek 866-248-4449

In unity,

Mark Boehmer

District 2-13 RMC Vice President





Joe Smolczynski
Secretary-Treasurer



Communication Workers of America-Local 13000

Statement of Financial Position

as of December 31, 2023

Total

ASSETS

Current Assets

Bank Accounts

1008-000 FIRSTTRUST OPERATING	281,580.15
1015-000 FIRSTTRUST-PAYROLL ACCOUNT	(67,679.22)
1570-000 FIRSTTRUST-MEMBER DEFENSE FUND	454.30
1580-000 FIRSTTRUST-MEMBER RELIEF FUND	518.46
Cash on hand	375.00

Total Bank Accounts \$ 215,248.69

Other Current Assets

1008-001 HAVERFORD- MM ACCT	14,352.01
1400-000 HAVERFORD-US GOV'T	698,368.88
1405-000 HAVERFORD CORP OBLIGATIONS	1,811,028.43
1410-000 HAVERFORD-COMMON STOCK	3,039,181.15
1411-000 MUTUAL FUNDS-	745,356.64
1412-000 HAVERFORD FED PRIME	204,581.07
1520-000 INVESTMENT-HAVERFORD CD'S	120,000.00
1705-000 EXCHANGE	35,000.00
1900-000 Inventory-East	16,567.60
1901-000 Inventory West	15,129.92
Undeposited Funds	110.45

Total Other Current Assets \$ 6,699,676.15

Total Current Assets \$ 6,914,924.84

Fixed Assets

1800-000 FURNITURE & FIXTURES	162,293.47
1801-000 COMPUTER EQUIPMENT	41,922.06
1809-000 WEST BLDG IMPROVEMENTS	292,658.84
1810-000 PHILA BLDG IMPROVEMENTS	2,814,662.27
1811-000 ACCUMULATED DEPRECIATION	(2,165,845.46)

Total Fixed Assets \$ 1,145,691.18

Other Assets

2100-000 SECURITY DEPOSIT	(12,395.84)
---------------------------	-------------

Total Other Assets \$ (12,395.84)

TOTAL ASSETS \$ 8,048,220.18

LIABILITIES AND EQUITY

Liabilities

Total Liabilities

Equity

Opening Balance Equity	(28,957.78)
Retained Earnings	8,069,114.11
Net Revenue	8,063.85
Total Equity	\$ 8,048,220.18

TOTAL LIABILITIES AND EQUITY \$ 8,048,220.18

Statement of Revenue, Expenses & Changes in Net Assets

as of December 31, 2023

Revenues:

TO/FROM COMMUNITY SERVICE FUND	\$ 131
REVENUE-INVENTORY SALES-PHILA	\$ 1,077
REVENUE-INVENTORY SALES-PITT	\$ 882
REIMBURSE MAILING EXPENSES	\$ 6,076
REIMBURSE WAGES-ORGANIZING	\$ 26,818
REIMBURSE WAGES-MOBILIZING	\$ 4,687
REIMBURSED WAGES/BARGAINING	\$ 3,780
REIMBURSE EXPENSES-BARGAINING	\$ 812
REIMBURSE EXPENSES-MOBILIZATIO	\$ 384
REIMBURSED AMERICAN EXPRESS CHARGE	\$ 91
DUES FROM NATIONAL	\$ 640,353
DUES-OTHER EMPLOYEES	\$ 2,423
UNION DUES STAFF-UFCW	\$ —
UTILITIES REFUND	\$ 47
1ST FL RENTAL INCOME	\$ 6,500
MAILING REFUND	\$ 155
Discounts given	\$ (6,704)
Unapplied Cash Payment Revenue	\$ —
Total Revenue	\$ 687,510

Expenses Paid

Salaries:

Executive President, Vice President & Treasurer	\$ 105,697
Eastern Region Vice President Salary	\$ 31,372
Western Region Vice President Salary	\$ 29,849
Eastern Region Salary	\$ 9,764
Western Region Salary	\$ 2,149
Executive Board Committees Salary	\$ 12,849
Unit Business Salary Eastern Region	\$ 42,062
Unit Business Salary Western Region	\$ 38,356
Eastern Region Staff Salary	\$ 32,641
Western Region Staff Salary	\$ 31,320
Executive Board Staff Salary	\$ 48,785
Organizing Salary	\$ 13,414
Mobilization Salary	\$ 3,428
Convention Salary Western Region	\$ 737
Convention Salary Eastern Region	\$ 1,197
Bargaining Salary	\$ 6,213
Education Salary	\$ —

Regional Allowances & Reimbursements

Eastern Region Allowance	\$ 640
--------------------------	--------

(continued on page 12)

Communication Workers of America-Local 13000

Statement of Revenue, Expenses & Changes in Net Assets

(continued)

as of December 31, 2023

Western Region Allowance	\$	1,102
Local Business Allowance	\$	1,965
Unit Business Allowance-Eastern	\$	1,328
Unit Business Allowance-Western	\$	2,913
Eastern Region Reimburse Expense	\$	1,820
Western Region Reimburse Expense	\$	1,811
Local Business Reimburse Expense	\$	2,555
Unit Business Reimburse-Eastern	\$	3,963
Unit Business Reimburse-Western	\$	3,969

Convention Allowances & Reimbursements

Convention Reimburse Expense-Eastern	\$	294
Convention Reimburse Expense-Western	\$	412
Convention Reimburse Expense-Board	\$	138
Convention Allowance- Eastern	\$	399
Convention Allowance-Western	\$	375
Convention Allowance-Board	\$	24
Convention Supplies & Expense	\$	100

Mobilization Allowances & Reimbursements

Mobilization Allowances	\$	296
Mobilization Reimburse Expense	\$	270

Organizing Reimburse Expense

Organizing Reimburse Expense	\$	476
------------------------------	----	-----

Bargaining Allowances & Reimbursements

Bargaining Allowance	\$	672
Bargaining Reimburse Expense	\$	882

Subscription & Membership

Subscription Eastern Region	\$	63
Subscription Executive Board	\$	4,437
Membership Eastern Region	\$	1,081
Membership Western Region	\$	2,049
Membership Executive Board	\$	—

Meeting Hall Rental

Eastern Region	\$	150
Western Region	\$	900
Executive Board	\$	—

Statement of Revenue, Expenses & Changes in Net Assets

(continued)

as of December 31, 2023

Travel, Hotels & Restaurant

Eastern Region	\$	1,274
Western Region	\$	2,231
Executive Board	\$	3,330
Bargaining		
Local Convention- Travel Hotel	\$	1,610
Organizing	\$	539
Education	\$	—

Telephone:

Eastern Region	\$	5,638
Western Region	\$	6,250
Executive Board	\$	4,622

Utilities:

Philadelphia-Utilities	\$	5,088
Western Region-Utilities	\$	1,390
Water & Sewer-Philadelphia	\$	790
Water & Sewer- West	\$	438

Building Maintenance:

Philadelphia Building Maintenance	\$	5,133
Western Region Building Maintenance	\$	3,401
Protection-3rd floor	\$	3,336
Protection-Eastern Region	\$	3,336
Protection-Western Region		
Sanitation-Western Region	\$	349
Maintenance Agreements	\$	5,400

Printing & Typing

Board	\$	1,436
Print & Typing -Eastern Region	\$	59
Print & Typing -Western Region	\$	393
CWA 13000News	\$	2,415

Office Supplies

Board	\$	1,075
Eastern Region	\$	3,824
Western Region	\$	725

Office Expense

Board	\$	(607)
-------	----	-------

(continued on page 13)



Communication Workers of America-Local 13000

Statement of Revenue, Expenses & Changes in Net Assets

(continued)

as of December 31, 2023

Postage & Delivery

Board	\$	12,621
Eastern Region	\$	12,520
Western Region	\$	4,271

Equip Leasing & Services

Equipment Leasing- Board	\$	3,880
Equipment Leasing-Eastern Region	\$	3,880
Equipment Leasing-Western Region	\$	3,871

Real Estate Tax

Philadelphia		
Western Region		

Professional Fees

Legal	\$	9,040
Accounting	\$	16,000
Actuary	\$	8,500

Statement of Revenue, Expenses & Changes in Net Assets

(continued)

as of December 31, 2023

Contribution

Board	\$	4,300
-------	----	-------

Other

Sympathy-Board	\$	489
Service Charge	\$	709
Bonds & Insurance	\$	2,139
Unemployment & SS Taxes		
Employee Benefits	\$	38,363
Payroll Tax Expense	\$	33,282
Payroll processing fees	\$	2,164
Misc. Expense	\$	40
Pension Funding	\$	—
Computer Work - Philadelphia	\$	600
Computer Work-Western Region	\$	1,513

Total Expenses Paid **\$ 666,575**

Operating Fund

as of 12/31/2023

	Shares	Unit Cost	Total Cost	Market Value
Certificates of Deposit				
Haverford Trust CD 4.75% 07/17/2023 - Principal	60,000	1.00	60,000.00	60,000.00
Haverford Trust CD 5.00% 08/08/2023 - Principal	60,000	1.00	60,000.00	60,000.00
Certificates of Deposit Total	120,000		120,000.00	120,000.00
Money Market - Taxable - Standard				
Federated Govt Obligations PS Fund 117 (GOFXX) - Principal	41,393,480	1.00	41,393.48	41,393.48
Cash Equivalents Total	161,393,480		161,393.48	161,393.48
Asset Total	161,393,480		161,393.48	1,324.39
Accrual Total				
Grand Total	161,393,480		161,393.48	162,717.87

(continued on page 14)

Communication Workers of America-Local 13000

Emergency Fund

as of 12/31/2023

	Shares	Unit Cost	Total Cost	Current Market Value
Cash Equivalents				
Money Market - Taxable - Standard				
Federated Govt Obligations PS Fund 117 (GOFXX) - Principal	235,735.55	\$ 1.00	235,735.55	\$ 235,735.55
Equity				
Domestic				
Air Prods & Chems Inc Com (APD)	277	\$ 156.63	43,386.29	\$ 75,842.60
Apple Inc Com (AAPL)	1,214.00	\$ 16.42	19,939.94	\$ 233,731.42
Blackrock Inc (BLK)	163	\$ 152.66	24,883.92	\$ 132,323.40
CVS Health Corporation (CVS)	902.00	\$ 44.44	40,083.16	\$ 71,221.92
Chevron Corporation (CVX)	560	\$ 163.36	91,480.35	\$ 83,529.60
Coca Cola Co Com (KO)	1,270.00	\$ 28.89	36,692.06	\$ 74,841.10
Costco Whsl Corp New Com (COST)	280	\$ 374.06	104,736.74	\$ 184,822.40
Honeywell Intl Inc Com (HON)	680	\$ 178.36	121,287.37	\$ 142,602.80
JPMorgan Chase & Co Com (JPM)	910	\$ 43.24	39,349.59	\$ 154,791.00
Johnson & Johnson Com (JNJ)	752.00	\$ 68.33	51,382.62	\$ 117,868.48
Lowes Cos Inc Com (LOW)	580	\$ 69.51	40,313.36	\$ 129,079.00
Mastercard Inc Class A (MA)	418	\$ 70.40	29,427.79	\$ 178,281.18
McKesson Corp (MCK)	140	\$ 439.87	61,581.77	\$ 64,817.20
Microsoft Corp Com (MSFT)	405	\$ 74.16	30,035.61	\$ 152,296.20
Nike Inc (NKE)	935	\$ 135.45	126,647.00	\$ 101,512.95
Oracle Corp Com (ORCL)	1072	\$ 50.14	53,745.46	\$ 113,020.96
Pepsico Inc Com (PEP)	794	\$ 68.90	54,704.00	\$ 134,852.96
RTX Corp (RTX)	1,604.00	\$ 78.08	125,245.26	\$ 134,960.56
S&P Global Inc (SPGI)	194	\$ 187.63	36,400.51	\$ 85,460.88
Starbucks Corp (SBUX)	830	\$ 58.12	48,238.18	\$ 79,688.30
TJX Cos Inc New Com (TJX)	1,098.00	\$ 27.74	30,462.59	\$ 103,003.38
Texas Instrs Inc Com (TXN)	585	\$ 185.06	108,257.98	\$ 99,719.10
Thermo Fisher Scientific Inc (TMO)	142	\$ 560.43	79,580.47	\$ 75,372.18
United Parcel Service Inc Cl B (UPS)	500	\$ 174.20	87,098.59	\$ 78,615.00
Unitedhealth Group Inc Com (UNH)	302	\$ 57.19	17,271.34	\$ 158,993.94
iShares S&P Midcap 400 Index (IJH)	621	\$ 174.88	108,598.07	\$ 172,110.15
iShares S&P Smallcap 600 Fnd (IJR)	1636	\$ 68.58	112,204.39	\$ 177,097.00
Domestic Total:	18,864.00		1,723,034.41	\$ 3,310,455.66
Equity ETF				
SPDR S&P 500 ETF Trust (SPY)	213	\$ 204.44	43,546.78	\$ 101,241.03
Foreign				
Aon Plc CLASS A (AON)	240	\$ 260.79	62,589.10	\$ 69,844.80
Eaton Corporation PLC ADR (ETN)	320	\$ 175.54	56,172.74	\$ 77,062.40
Medtronic PLC ADR (MDT)	995	\$ 79.75	79,348.36	\$ 81,968.10
Foreign Total	1,555.00		198,110.20	\$ 228,875.30
Equity Total	21,407.00		1,964,691.39	\$ 3,640,571.99
Fixed Income Corporate Bonds & Notes				
Amazon.Com Inc 3.8% 12/5/24	85,000.00	\$ 100.33	85,276.46	\$ 83,877.32
American Express Co. 2.25% 3/4/2025	10,000.00	\$ 98.15	9,815.12	\$ 9,678.45

(continued on page 15)



Communication Workers of America-Local 13000

Emergency Fund *(concluded)*

as of 12/31/2023

	Shares	Unit Cost	Total Cost	Current Market Value
Atlantic City Electric 3.375% 9/1/24	150,000.00	\$ 99.98	149,974.53	\$ 147,656.40
BB&T Corp 2.50% 8/1/24	100,000.00	\$ 101.85	101,850.81	\$ 98,323.20
Bank Of America Corp 5.819% 9/15/29	85,000.00	\$ 100.24	85,203.15	\$ 87,734.03
Berkshire Hathaway 3.50% 2/1/25	50,000.00	\$ 100.87	50,434.36	\$ 49,169.15
Berkshire Hathaway Finance Corp 1.45% 10/15/2030	70,000.00	\$ 99.85	69,897.87	\$ 58,821.28
Blackrock Inc 4.75% 5/25/2033	110,000.00	\$ 97.95	107,742.74	\$ 110,934.67
Comcast Corp 3.375% 8/15/25	85,000.00	\$ 100.32	85,269.42	\$ 82,967.57
Federal Farm Credit Banks Funding 1.33% 11/3/2026	200,000.00	\$ 100.08	200,152.11	\$ 184,355.00
Freddie Mac 5.375% 3/28/2025	100,000.00	\$ 100.00	100,000.00	\$ 99,890.50
Genuine Parts Co 6.50% 11/1/2028	100,000.00	\$ 99.89	99,891.00	\$ 106,251.00
Gilead Sciences Inc 3.5% 2/1/25	60,000.00	\$ 101.03	60,620.85	\$ 59,052.18
Goldman Sachs Group Inc 3.50% 4/1/2025	100,000.00	\$ 96.78	96,775.07	\$ 97,519.20
HP Inc. 3.00% 6/17/2027	100,000.00	\$ 94.89	94,890.08	\$ 94,418.10
JPMorgan Chase & Co 3.782% 2/1/28	125,000.00	\$ 93.87	117,331.25	\$ 120,852.00
PNC Financial Services 3.45% 4/23/29	100,000.00	\$ 102.85	102,846.01	\$ 94,523.70
Texas Instruments Inc 2.25% 9/4/2029	100,000.00	\$ 88.57	88,568.50	\$ 90,059.60
Wells Fargo & Co 3.30% 9/9/24	65,000.00	\$ 100.25	65,164.24	\$ 64,148.11
Totals			1,771,703.57	\$ 1,740,231.46
Fixed Income ETF				
iShares 0-5 Year Tips Bond ETF (STIP)	2,138.00	\$ 101.50	217,012.77	\$ 210,785.42
iShares Barclays MBS Bd (MBB)	822.00	\$ 108.78	89,413.05	\$ 77,333.76
iShares Floating Rate (FLOT)	3,065.00	\$ 50.74	155,518.10	\$ 155,150.30
Fixed Income ETF Total	7,348.00		461,943.92	\$ 443,269.48
Municipal Bonds & Notes - Taxable				
California St 3.05% 4/1/29	100,000.00	\$ 102.97	102,969.03	\$ 92,828.00
Radnor PA 1.729% 11/1/28	50,000.00	\$ 100.00	50,000.00	\$ 44,543.00
Municipal Bonds & Notes - Taxable Total	150,000.00		153,219.64	\$ 137,371.00
U.S. Government Agency Obligations - Mortgage-Backed Bonds				
FR SD8368 6.00% 10/1/2053	112287.863	\$ 98.98	111138.68	\$ 114,079.67
FFCB 0.74% 6/30/2025	140,000.00	\$ 100.00	140,000.00	\$ 132,256.74
U.S. Treasury Bonds & Notes				
US Treasury Notes 2.00% 11/15/2026	175,000.00	\$ 103.76	181,573.54	\$ 165,484.38
United States Treasury 4.00% 10/31/29	305,000.00	\$ 98.97	301,872.97	\$ 306,715.63
U.S. Treasury Bonds & Notes Total	480,000.00		483,446.51	\$ 472,200.01
Fixed Income Total	2,442,348.00		3,121,201.71	\$ 3,039,408.36
Asset Total	2,939,680.41		522,144.20	\$ 6,916,231.45
Accrual Total				\$ 27,840.09
Grand Total	2,939,680.41		5,322,144.20	\$ 6,944,071.54

