

Dan Boehm
MTS, Inc.

June 30, 2015

Dear Dan,

The Union is requesting that the Company agree to submit all items in dispute to Interest Arbitration.

Sincerely,

A handwritten signature in black ink, consisting of a large, stylized initial 'J' followed by a horizontal line extending to the right.

James Macon
President
ATU Local 998

Cc: L. Hanley
J. Borchardt
C. Watson

Middleton Jeff

From: Dan Boehm
Sent: Tuesday, June 30, 2015 3:26 PM
To: Middleton Jeff; president@atu998.org
Cc: Dan Boehm; david.kern@quarles.com
Subject: Re: request for interest arbitration

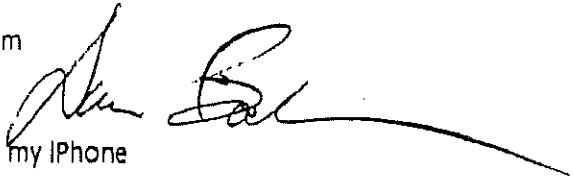
Handwritten: James Martin

Dear James;

As you know the deck is stacked against MCTS in interest arbitration. We would lose all local control over the contract. Instead a third party would make our contract, based on comparisons to out of state contracts that don't take into account our unique local circumstances, and particularly the looming deficit that we face.

Therefore, we must respectfully decline the union's request.

Sincerely,
Dan Boehm



Sent from my iPhone

James Macon

From: Middleton Jeff <jmiddleton@fmcs.gov>
Sent: Thursday, July 2, 2015 10:34 AM
To: dboehm@mcts.org; jborchardt@atu.org; david.kern@quarles.com; James Macon;
tminefee-tribble@mcts.org
Subject: Availability

Good morning to all,

To clarify the issue of my availability to meet, please communicate these facts to any and all concerned. I am available 24-7 to conduct a mediation session mutually agreeable to the parties. It is true that David and I compared calendars and discussed some possibilities due to our limited availability, but that conversation occurred before the end of Monday's session and the notice of the work stoppage was delivered.

I will need to modify my schedule in order to meet, but please know that I am ready, able and willing to do so at any time.

Please contact me immediately if you have any questions or concerns.

Sincerely,

Jeffrey L. Middleton
Commissioner

Federal Mediation & Conciliation Service
Milwaukee Field Office
10000 Innovation Drive, Suite 110
Wauwatosa, WI 53226

920-400-0136 (Cell)
414-771-7125 (Office)
414-771-7143 (Fax)

Key Points:

1. COLA (wages) is ok – keep it capped.
2. Annual Deductibles – defer to MTS
3. Coinsurance of 90% is final objective (80% is better but may not be able to be realized). Need to define where coinsurance impacts Appendix H, ALSO, need to be clear about benefits under Medicare and how coinsurance will impact coordination of benefits for Medicare – KM to Call Matt Hanchek to discuss.
4. Contributions on the Premium can remain at 13% -- establish appropriate caps
5. Out-of-Pocket Maximums – defer to MTS (if ACA maximums are exceeded in negotiations employees will catch a break at time of implementation)
6. Rx- defer to MTS
7. Co-Payments – defer to MTS
8. Overtime – Milwaukee County went to a 40 hour model a few years ago, after 8 hours in a day is no longer acceptable. Also, how would a wage increase (as incentive) balance with estimated overtime savings?
9. Part-time employees—7 to 20% will be fine.
10. Pension Eligibility – NEED to DISCUSS
11. Pension COLA – Milwaukee County also has 2% -- also NEED to DISCUSS
12. Sick Leave Payout – NEED to DISCUSS -- cost out based on F.FO concept
13. Wages – at 0% as long as COLA is in place.

NEED to DISCUSS. New Hires vs. Those not vested vs. Already vested

Champine vs. Milwaukee County, and later Porth / Pasko vs. Milwaukee County are the two cases on point with the sick leave payout issue. "Although an employee does not automatically have the right to be paid for accrued sick allowance, an employer may provide a payout provision. Where that occurs, as in this case, such a benefit represents a form of deferred compensation that is earned as the work is performed. The benefit can be changed, but only as it is related to work not yet performed..." (underlined by me for emphasis).

<http://www.wiscourts.gov/caseload/DisplayDocument.aspx?contentid=1013&id=99257>

I have doubts that MCTS can impact the existing accrued sick time. I think they can change the rules for future accrual, and negotiate (or possibly unilaterally implement) a rule clarifying a F.FO approach to using time accumulated in the sick bank. I'd ask for legal advice on this regardless.

The other concern I raised was in regard to potential pension changes being applied to existing employees. Even if the Union agrees to the changes through collective bargaining, each individual could pursue litigation regarding vested property rights. I would ask your attorney to help assess what provisions/changes potentially impact the vested property of the members, and assess options for applying changes to mitigate risk.

- Matt

Finally, Appendix H refers to a 'Carrier's Master Insurance Contract' should be changed to 'Summary Plan Description.'

	HARD-LINE	COMPROMISE	LENIENT	NOTES
COLA	Delete COLA Provision	COLA remains as is w/cap	Remove COLA cap	
MEDICAL INSURANCE	[REDACTED]			
Annual Deductible	\$750(s) \$1500(E) \$2250(E-)	\$600(s) \$1200(E) \$1800(E-)	No Change \$500(s) \$1000(E) \$1500(E-)	
Co-insurance	80%	90%	No Co-insurance	
EE Monthly Premium Contribution	15% no caps	14% w caps	13% w current caps	
Medical Out-of-Pocket Maximum	\$2750(s) \$3500(E) \$4250(E-)			OOP maximums established will be consistent with the ACA and be dependent on annual deductible, co-insurance
Prescription Drug Co-Payments	\$10(g) \$35(b) \$60(bn)	\$10(g) \$35(b) \$60(bn)	\$10(g) \$35(b) \$60(bn)	Current proposal holds co-payments at 2015 rate with proposed increases in CY 2017
Medical Services Co-Payments	\$30(pcp) \$50(sp) \$200(er)	\$30(pcp) \$50(sp) \$200(er)	\$30(pcp) \$50(sp) \$200(er)	Current proposal holds co-payments at 2015 rate with proposed increases in CY 2018
OVERTIME	Overtime payment is triggered after 40 working hours in 1 week		No Change; overtime is paid after 8 hours of work in 1 day	Any compromise proposal may be administratively difficult to manage
PART-TIME EMPLOYEES	55% of FT Workforce (E/L) as of 4/1/80	20% of FT Bus Operators as of 4/1/15	7% of FT Bus Operators as of 4/1/15	
PENSION	[REDACTED]			
Eligibility	Eliminate 27 & Out	Minimum Age of 55-59	No Change in Pension Eligibility	
Retiree COLA	0%	1%	2%	
SICK LEAVE PAY OUT	120 days max @ 50% of current hourly pay	120 days max @ 60%-90% of current hourly pay	No Change; 120 days max at current hourly pay	
WAGES	0%			In the 2013 labor negotiations, ATU received a roll-in of COLA (as of 2 nd quarter) and 23% base wage increase

	HARD-LINE	COMPROMISE	LENIENT	NOTES
COLA	Delete COLA Provision	COLA remains as is w/cap	Remove COLA cap	
MEDICAL INSURANCE				
Annual Deductible	\$750(s) \$1500(F) \$2250(F-)	\$600(s) \$1200(F) \$1800(F-)	No Change \$500(s) \$1000(F) \$1500(F-)	
Co-insurance	80%	90%	No Co-insurance	
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OVERTIME	Overtime payment is triggered after 40 working hours in 1 week		No Change; overtime is paid after 8 hours of work in 1 day	Any compromise proposal may be administratively difficult to manage
PART-TIME EMPLOYEES	33% of FT Workforce (E/L) as of 4/1/80	20% of FT Bus Operators as of 4/1/15	7% of FT Bus Operators as of 4/1/15	
PENSION				
Eligibility	Eliminate 27 & Out	Minimum Age of 55-59	No Change in Pension Eligibility	
Retiree COLA	0%	1%	2%	
SICK LEAVE PAY OUT	120 days max @ 50% of current hourly pay	120 days max @ 60%-90% of current hourly pay	No Change; 120 days max at current hourly pay	
WAGES	0%			In the 2013 labor negotiations, ATU received a roll-in of COLA (as of 2 nd quarter) and 1.25% base wage increase

Key Points:

1. COLA (wages) is ok – keep it capped
2. Annual Deductibles – defer to MTS
3. Coinsurance of 90% is final objective (80% is better but may not be able to be realized). Need to define where coinsurance impacts Appendix H; ALSO, need to be clear about benefits under Medicare and how coinsurance will impact coordination of benefits for Medicare – KM to Call Matt Hanchek to discuss.
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<http://www.wiscourts.gov/cas/caseload/DisplayDocument.htm?contentid=11&seqNo=93257>

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- Matt

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**ISSUES AT HAND THAT NEED TO BE ADDRESSED CONCERNING
MILWAUKEE COUNTRY TRANSIT SYSTEM THAT ARE AFFECTING THE INNER-CITY**

- Public Transportation is not funded properly
- Discrimination and Segregation are on the rise.
- Milwaukee County Office of the Comptroller Audit Services Division of 2017 is incomplete.
- Nate Holton, Director of Inclusion, Milwaukee County Transit System has been hired by the county from County Executive Chris Abele's office, to do the audit for MCTS and is on their payroll. He is also involved with negotiations and grievances between the Company (MCTS) and Amalgamated Transit Union, Local 998 (ATU Local 998). What does that have to do with the Audit Report?
- Bus Route Cuts are affecting people to get to their jobs.
- Milwaukee County Transit System (MCTS) has given back money to the county during the past four years. The returned funds could have been used for Transportation Service.
- The Inner-City transportation service will be cut-off from traveling to Brookfield, where better-paying jobs are, compared to Milwaukee County. Currently, it is the Goldline, but will be replaced by the BRT (Bus Rapid Transit).

- How is MCTS improving the bus service if people cannot get to their jobs?
- Rapid Transit lacks coverage: People have to walk farther to get to bus stops.
- See the 2017 Audit Report, regarding Discrimination.

ITS OUR PENSION WE HAVE TO PROTECT IT

1

From: Alesha Monk
Sent: Wednesday, December 05, 2018 3:04 PM
To: Tim Hosch <THosch@mcts.org>; ATU998-FST <fst@atu998.org>; ATU998-Vice President <vicepresident@atu998.org>; Dan Boehm <DBoehm@mcts.org>; Sandra Kellner <SKellner@mcts.org>
Cc: mcts@opeiu35.org; pres@opeiu35.org
Subject: RE: Pension Contribution 2019

0

Tim,

2

As Chair of the board and citing article 8.2(a) of the Pension Handbook, I insist that the overall contribution rate be unchanged until at such time all members of the Pension Board can unanimously agree to make changes to the overall contribution rate that is in the best interest of the Pension Fund. This correspondence serve as notice that the Union members of the Pension Board **DID NOT** agree to the changes you have indicated in your email, of which the Company members of the Pension Board have unlawfully enforced. Section 8.2(a) states "The contribution required to maintain the Plan in sound financial condition shall be actuarially determined by the Actuary on an annual basis in accordance with the accepted actuarial practices. Current assumptions, methods, and funding standards (i.e., amortization of debt) shall only be changed based on unanimous agreement of the Pension Board".

3

Thank you,

Alesha

4

0. Tim Hosch, MTS CFO.

Tim is the Financial Secretary of the pension board.

1. Alesha Monk, MTS employee.

Alesha is the **CHAIR** of the pension board.

2. The "Pension Board" consisting of three company and three union for a board of (6) six.

DID NOT agree to change the contribution amount.

3. The company is unlawfully implementing a reduction to the contribution amount to the pension (our pension is in debt).

4. The motion to reduce the pension contribution ended with a **deadlock** vote not unanimous agreement.

OPEIU 35 and ATU 998 pension board members/fiduciaries are only interested in getting the pension out of debt.

The company will realize near \$2.8 million budgetary gain while cutting routes, union jobs, etc.

We as the employees and beneficiaries of the pension will notice \$13.20 per week as we watch our pension debt increase.



AMALGAMATED-TRANSIT UNION

LOCAL 998 • AFFILIATED WITH AFL-CIO

734 North 26th Street Milwaukee, WI 53233 (414) 342-4300 Fax: (414) 342-1998

February 28, 2018

Sylvana Radmer
Chief Human Resources Officer
Milwaukee County Transit System
1942 North 17th Street
Milwaukee, WI 53205

JAMES MACON
President

MICHAEL BAUTCH
Vice President

JOHN GROH
Financial Secretary-
Treasurer

CASSANDRA COBB
Recording Secretary

Dear Sylvana:

The Union has received the new policy regarding Sick Leave. The policy is a change to the working conditions, violates past practice provisions and needs to be negotiated. Effective immediately, the union is requesting the company to cease and desist this policy. The union demands to bargain over any changes to the Sick Leave policy.

Sincerely,

James Macon
President
Amalgamated Transit Union, Local 998

JM:vc:opeiu9aficio
Enclosure: (new policy)

Milwaukee County Quarterly Fiscal Report
Section III – Narrative Explanation
Agency --- 560
Organization --- 5600 --- MCTS
Period ending --- August 31, 2017

Fiscal Position

Revenues less Expenditures:

<i>Year to Date Actual:</i>	11,653,154
<i>Projected Annual:</i>	(13,272,575)
<i>Adjusted Budget:</i>	(14,272,575)
<i>Variance:</i>	1,000,000

Based on actual data through August, it is projected that MCTS will be \$1,000,000 under budgeted tax levy.

Significant Variances

Revenue: Transit System fixed route passenger revenue is projected to be \$1,270,000 (3.8%) under budget due to general ridership declines of 3.3 percent. Total passengers are projected to be 1.1 million under budget.

Federal Capitalized Maintenance will be reduced \$4 million as a corresponding offset to decreases in pension and medical costs.

Vehicle Registration Fees are projected to be \$400,000 over budget.

Paratransit revenues are expected to be at or near budgeted levels.

Expenditures: Transit operating expenses are projected to be \$5,870,000 under budget in 2017 due to projected savings in fuel expenses (\$600,000), pension costs (\$4,930,000) and health care savings (\$340,000).

Paratransit expenditures are expected to be at or near budgeted levels.

Item of Concern – none.

Deficit Action Plan – none.

Surplus Action Plan – none.

Price Adjustment – none.

B U D G E T S U M M A R Y

Category	2015 Actual	2016 Actual	2017 Budget	2018 Budget	2018/2017 Variance
Expenditures					
Personnel Costs	\$0	\$0	\$0	(\$882,586)	(\$882,586)
Operation Costs	\$145,011,202	\$149,812,087	\$153,857,157	\$153,298,389	(\$558,768)
Debt & Depreciation	\$2,211,563	\$3,019,719	\$3,187,051	\$3,328,997	\$141,946
Capital Outlay	\$337,002	\$705,554	\$150,000	\$156,250	\$6,250
Interdept. Charges	\$2,224,498	\$2,563,541	\$3,307,915	\$2,714,165	(\$593,750)
Total Expenditures	\$149,784,265	\$156,100,901	\$160,502,123	\$158,615,215	(\$3,046,611)
Revenues					
Direct Revenue	\$43,045,780	\$39,292,655	\$40,813,624	\$41,951,915	\$20,982
Intergov Revenue	\$87,850,512	\$94,167,792	\$94,220,023	\$92,065,007	(\$2,155,016)
Indirect Revenue	\$0	\$0	\$9,000	\$9,000	\$0
Local VRF Revenues	\$0	\$0	\$11,497,964	\$14,659,727	\$3,161,763
Total Revenues	\$130,896,292	\$133,460,447	\$146,540,611	148,685,649	\$2,145,038
Tax Levy					
Tax Levy	\$18,887,973	\$22,640,453	\$13,961,512	\$9,929,566	(\$4,031,946)
Effective Tax Levy	\$16,663,475	\$20,076,912	\$10,653,597	\$7,215,101	(\$3,438,496)
Personnel **					
Full-Time Pos. (FTE)	0.00	0.00	0.00	0.00	0.00
Seas/Hourly/Pool Pos.	0.00	0.00	0.00	0.00	0.00
Overtime \$	\$0	\$0	\$0	\$0	\$0

*The Effective Tax Levy excludes interdepartmental charges and fringe benefit costs.

**The Personnel table above represents Milwaukee County employees. Transit staff are employees of Milwaukee Transport Services (MTS), Inc., a quasi-governmental instrumentality of Milwaukee County and therefore not reflected.

Department Mission: The Milwaukee County Transit System (MCTS) exists to provide reliable, convenient and safe public transportation services that efficiently and effectively meet the varied travel needs of the community and contribute to its quality of life.

Department Description: The Director's Office of the Milwaukee County Department of Transportation (MCDOT) provides County oversight of MCTS as well as conducts various transit related studies and prepares and administers Federal and State transit grants. Division personnel also facilitate the acquisition of capital equipment and provide the Architecture & Engineering Division (A&E) of the Department of Administration Services (DAS) with capital improvement recommendations for MCTS facilities. Milwaukee Transport Services, Inc. (MTS), as a quasi-governmental instrumentality of Milwaukee County, manages and operates the Milwaukee County Transit System, including paratransit services. MTS uses transit facilities and equipment owned and provided by Milwaukee County.

Major Changes in FY 2018: In 2018 MCTS will continue to operate similar levels of transit services as in 2017. Changes to fares are recorded in the fare table on page 8 and in strategic program areas: Paratransit and Fixed Route. The 2017 adopted budget included revenue allocated from a \$30 County Vehicle Registration Fee (VRF).

Budget Summary

Category	2015 Budget	2015 Actual	2016 Budget	2017 Budget	2017/2016 Variance
Expenditures					
Personnel Costs	\$0	\$0	\$0	\$0	\$0
Operation Costs	\$160,182,288	\$145,011,202	\$157,676,195	\$153,857,157	(\$3,819,038)
Debt & Depreciation	\$2,437,503	\$2,211,563	\$2,391,532	\$3,187,051	\$795,519
Capital Outlay	\$320,000	\$337,002	\$185,000	\$150,000	(\$35,000)
Interdept. Charges	\$2,434,954	\$2,224,498	\$2,847,642	\$3,307,915	\$460,273
Total Expenditures	\$165,374,745	\$149,784,266	\$163,100,369	\$160,502,123	(\$2,598,246)
Revenues					
Direct Revenue	\$49,534,651	\$43,045,780	\$45,803,159	\$52,311,588	\$6,508,429
Intergov Revenue	\$95,821,935	\$87,850,512	\$94,830,580	\$94,220,023	(\$610,557)
Indirect Revenue	\$0	\$0	\$0	\$9,000	\$9,000
Total Revenues	\$145,356,586	\$130,896,292	\$140,633,739	\$146,540,611	\$5,906,872
Tax Levy	\$20,018,159	\$18,887,973	\$22,466,630	\$13,961,512	(\$8,505,118)
Personnel *					
Full-Time Pos. (FTE)	0	0	0	0	0
Seas/Hourly/Pool Pos.	0	0	0	0	0
Overtime \$	\$0	\$0	\$0	\$0	\$0

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Milwaukee Transport Services, Inc. (MTS), as a quasi-governmental instrumentality of Milwaukee County, manages and operates the Milwaukee County Transit System, including paratransit services. MTS uses transit facilities and equipment owned and provided by Milwaukee County.

Budget Summary

Category	2014 Budget	2014 Actual	2015 Budget	2016 Budget	2016/2015 Variance
Expenditures					
Personnel Costs	\$0	\$0	\$0	\$0	\$0
Operation Costs	\$154,205,814	\$149,843,746	\$160,182,288	\$157,676,195	(\$2,506,093)
Debt & Depreciation	\$2,424,376	\$2,198,814	\$2,437,503	\$2,391,532	(\$45,971)
Capital Outlay	\$460,000	\$889,633	\$320,000	\$185,000	(\$135,000)
Interdept. Charges	\$2,416,284	\$2,119,536	\$2,434,954	\$2,847,642	\$412,688
Total Expenditures	\$159,506,474	\$155,051,729	\$165,374,745	\$163,100,369	(\$2,274,376)
Revenues					
Direct Revenue	\$49,865,902	\$47,806,411	\$49,534,651	\$45,803,159	(\$3,731,492)
Intergov Revenue	\$91,121,855	\$91,587,654	\$95,821,935	\$94,830,580	(\$991,355)
Indirect Revenue	\$0	\$0	\$0	\$0	\$0
Total Revenues	\$140,987,757	\$139,394,065	\$145,356,586	\$140,633,739	(\$4,722,847)
Tax Levy	\$18,518,717	\$15,657,664	\$20,018,159	\$22,466,630	\$2,448,471
Personnel *					
Full-Time Pos. (FTE)	0	0	0	0	0
Seas/Hourly/Pool Pos.	0	0	0	0	0
Overtime \$	\$0	\$0	\$0	\$0	\$0

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Milwaukee Transport Services, Inc. (MTS), as a quasi-governmental instrumentality of Milwaukee County, manages and operates the Milwaukee County Transit System, including paratransit services. MTS uses transit facilities and equipment owned and provided by Milwaukee County.

Paratransit services include demand responsive transportation and orientation to transportation services. These services complement the fixed-route services of MCTS and are available to those who are Americans with Disabilities Act (ADA) Paratransit eligible. ADA-eligible riders, as well as those 65 and older, are also eligible for the Growing Opportunities program pass (GO Pass) that allows for unlimited free rides on all MCTS buses.

Budget Summary

Category	2016/2016 Actual	2017/2017 Actual	2018 Budget	2019 Budget	2019/2018 Variance
Expenditures					
Personnel Costs	\$0	\$0	(\$882,586)	\$0	\$882,586
Operation Costs	\$149,812,088	\$145,049,532	\$153,298,389	\$150,242,107	(\$3,056,282)
Debt & Depreciation	\$3,019,720	\$3,275,776	\$3,328,997	\$3,328,997	\$0
Capital Outlay	\$705,553	\$587,085	\$156,250	\$145,000	(\$11,250)
Interdept. Charges	\$2,563,541	\$2,753,248	\$2,714,165	\$2,653,653	(\$60,512)
Total Expenditures	\$156,100,902	\$151,665,641	\$158,615,215	\$156,369,757	(\$2,245,458)
Revenues					
Direct Revenue	\$39,292,655	\$39,589,161	\$41,951,915	\$41,371,905	(\$580,010)
Intergov Revenue	\$94,167,792	\$89,484,441	\$92,065,007	\$89,853,693	(\$2,211,314)
Indirect Revenue	\$0	\$0	\$9,000	\$0	(\$9,000)
Local VRF Revenues	\$0	\$12,228,524	\$14,659,727	\$15,731,243	\$1,071,516
Total Revenues	\$133,460,447	\$141,302,126	\$148,685,649	\$146,956,841	(\$1,728,808)
Tax Levy					
Tax Levy	\$22,640,455	\$10,363,515	\$9,929,566	\$9,412,916	(\$516,650)
Effective Tax Levy	\$27,209,142	\$7,610,267	\$7,224,401	\$6,759,263	(\$456,138)
Personnel **					
Full-Time Pos. (FTE)	0.0	0.0	0.0	0.0	0.0
Seas/Hourly/Pool Pos.	0.0	0.0	0.0	0.0	0.0
Overtime \$	\$0	\$0	\$0	\$0	\$0

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**The Personnel table above represents Milwaukee County employees. Transit staff are employees of Milwaukee Transport Services (MTS), Inc., a quasi-governmental instrumentality of Milwaukee County and therefore not reflected.

Department Mission: The Milwaukee County Transit System (MCTS) exists to provide reliable, convenient and safe public transportation services that efficiently and effectively meet the varied travel needs of the community and contribute to its quality of life.

Department Description: The Director's Office of the Milwaukee County Department of Transportation (MCDOT) provides County oversight of MCTS as well as conducts various transit related studies and prepares and administers Federal and State transit grants. Division personnel also facilitate the acquisition of capital equipment and provide the Architecture & Engineering Division (A&E) of the Department of Administration Services (DAS) with capital improvement recommendations for MCTS facilities. Milwaukee Transport Services, Inc. (MTS), as a quasi-governmental instrumentality of Milwaukee County, manages and operates the Milwaukee County Transit System, including paratransit services. MTS uses transit facilities and equipment owned and provided by Milwaukee County.

Major Changes in FY 2019: In 2019, MCTS will continue to operate similar levels of transit services as in 2018. Service adjustments and eliminations, as well as increases to special fares, are included in 2019. The decreases in Direct and Intergovernmental Revenue shown above reflect a declining trend in Passenger Revenue (\$613,571) and the end of the Zoo Litigation funding (\$2.2 million). Specific changes are identified under the strategic program areas.

information below. 2018 Transit Fund surplus/(deficit) is not available since we are in the process of closing the books.

The Surplus/ (Deficit) from tax levy represents the net tax levy savings (surplus) or net tax levy cost (deficit) from the budgeted tax levy that was originally allocated in the Transit Fund budget for each year. For example, the 2016 Budget year had an overall deficit of (\$144,498), which consisted of a net tax levy budget of \$22.8 million and actual net costs of \$22.95 million.

MCTS operations is just a piece of the Transit Fund budget. It is the largest piece, but the County also budgets for maintenance and capital costs paid by the County and Federal Grants, cross-charges for County services, and debt costs for County funded capital. Offsetting all of these costs are Federal and State revenues for operations. The County is the payor of last resort for all costs net of revenues received from outside funding sources. The reported surplus/ deficit consists of all of these items rolled into one total.

Please call me with any questions.

Surplus/(Deficit) of the Transit Fund for the last five years.

Year	Surplus / (Deficit)
2017	\$1,602,341
2016	(\$144,498)
2015	\$730,369
2014	\$3,182,745
2013	\$2,630,200



ITS OUR PENSION WE HAVE TO PROTECT IT

1

From: Alesha Monk
Sent: Wednesday, December 05, 2018 3:04 PM
To: Tim Hosch <THosch@mcts.org>; ATU998-FST <fst@atu998.org>; ATU998-Vice President <vicepresident@atu998.org>; Dan Boehm <DBoehm@mcts.org>; Sandra Kellner <SKellner@mcts.org>
Cc: mcts@opeiu35.org; pres@opeiu35.org
Subject: RE: Pension Contribution 2019

0

Tim,

2

As Chair of the board and citing article 8.2(a) of the Pension Handbook, I insist that the overall contribution rate be unchanged until at such time all members of the Pension Board can unanimously agree to make changes to the overall contribution rate that is in the best interest of the Pension Fund. This correspondence serve as notice that the Union members of the Pension Board **DID NOT** agree to the changes you have indicated in your email, of which the Company members of the Pension Board have unlawfully enforced. Section 8.2(a) states "The contribution required to maintain the Plan in sound financial condition shall be actuarially determined by the Actuary on an annual basis in accordance with the accepted actuarial practices. Current assumptions, methods, and funding standards (i.e., amortization of debt) shall only be changed based on unanimous agreement of the Pension Board".

3

4

Thank you,
Alesha

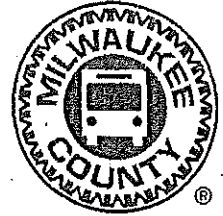
0. Tim Hosch, MTS CFO.
Tim is the Financial Secretary of the pension board.
1. Alesha Monk, MTS employee.
Alesha is the **CHAIR** of the pension board.
2. The "Pension Board" consisting of three company and three union for a board of (6) six.
DID NOT agree to change the contribution amount.
3. The company is unlawfully implementing a reduction to the contribution amount to the pension (our pension is in debt).
4. The motion to reduce the pension contribution ended with a **deadlock** vote not unanimous agreement.

OPEIU 35 and ATU 998 pension board members/fiduciaries are only interested in getting the pension out of debt. The company will realize near \$2.8 million budgetary gain while cutting routes, union jobs, etc. We as the employees and beneficiaries of the pension will notice \$13.20 per week as we watch our pension debt increase.

Milwaukee County Transit System

1942 NORTH 17TH STREET • MILWAUKEE, WISCONSIN • 53205-1697 • (414) 344-4550

vital then. vital now.



The company, in fact did exactly that. When we considered all scenarios, we believed that 7 days would be a reasonable period of time. We also believed the additional time would be a demonstration of good faith toward the Union. The company sent a letter to the union, again asking for input and we waited two weeks, but received no response. After what we believe was sufficient conversation, examples of the need, consideration of the Union's counter proposal, and adjustment to our policy as a result of that counter-proposal, and a sufficient period of time of notice to the Union, only then did we notify our employees of this change.

There was no change to the contract, and we believe the company has operated fully within its rights to manage its workforce in a responsible manner.

I hope this clears up the misunderstanding.

Sincerely,

A handwritten signature in cursive script that reads "Sylvana Radmer".

Sylvana Radmer, MBA, SPHR
Chief Human Resources Officer
Milwaukee County Transit System
1942 N. 17th Street
Milwaukee, WI 53205
414-937-3230

Good afternoon,

Just wanted to follow up with you in regards to what we had discussed in our attendance meeting on January 31, 2018. Initially we have proposed that on the fourth day of being absent, an Operator would have to produce a Doctor's excuse or have had to apply for FMLA not to be in violation of Rule #51, absent without permission. In our discussion, you had requested the time period be increased for the fourth day to the seventh day. In cooperation of your request, for the following attendance policy with take effect Sunday March 4, 2108.

- On or after March 4, 2018 you will be required to provide the Company with a Doctor's note stating that you have been under his/her care and unable to work with a projected return date after being absent seven days. This note must be physically provided to the Company before you sign up for your work on the eighth day, if you are returning to work. In the event that you will remain off sick, the note must be emailed, faxed or delivered to the Company by 430 PM on the eighth day.
- On or after March 4, 2018 if you have been absent for seven days and have not provided the Company with a Doctor's note, you must apply for FMLA prior to the eighth day.

If you fail to provide the Company with a Doctor's note or apply for FMLA on or before the eighth consecutive calendar day you will be subject to discipline for a Rule #51, absent without permission, the first offense being a three day suspension.

Also, I will be meeting with the Station staff on Friday, February 9, 2018 to begin the transition of how absent calls are recorded at the Station. As we agreed, the Operator will still call into the Station Clerk to report that they will be absent, and also at that time the call will be transferred to a Station Supervisor where the Operator will need to report the reason or nature of the illness. Please be patient while we make these changes.

Thank you,
Denise Wandke



AMALGAMATED-TRANSIT UNION

LOCAL 998 • AFFILIATED WITH AEL CIO

734 North 26th Street Milwaukee, WI 53233 (414) 342-4300 Fax: (414) 342-1998

JAMES MACON
President

MICHAEL BAUTCH
Vice President

JOHN GROH
Financial Secretary-
Treasurer

CASSANDRA COBB
Recording Secretary

April 22, 2019

Nate Holton
Director of Diversity and Inclusion
Milwaukee County Transit System
1942 North 17th Street
Milwaukee, WI 53205

Dear Nate:

I would like a breakdown of the number of employees in the New Members' Class from January 2018 to present.

Please list the number of employees in each class. How many are currently employed by MCTS. How many are no longer employed by MCTS and the reason why.

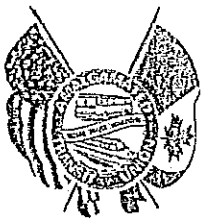
This information is needed as soon as possible.

Sincerely,

James Macon

James Macon
President
ATU Local 998

Cc: M. Jarvis



AMALGAMATED TRANSIT UNION

LOCAL 998 • AFFILIATED WITH AEL-CIO

734 North 26th Street Milwaukee, WI 53233 (414) 342-4300 Fax: (414) 342-1998

JAMES MACON
President

MICHAEL BAUTCH
Vice President

JOHN GROH
Financial Secretary
Treasurer

CASSANDRA COBB
Recording Secretary

April 25, 2019

Nate Holton
Director of Diversity and Inclusion
Milwaukee County Transit System
1942 North 17th Street
Milwaukee, WI 53205

Reference: Open Records Request (Workers' Compensation)

Dear Nate:

This is an "Open Records Request" for information needed as follows:

- ✓ How many Workers' Compensation cases have been filed since the outsource?
- ✓ How many Workers' Compensation cases have been denied?
- ✓ What was the cost-savings on the outsourcing of Workers' Compensation cases?

This information is needed as soon as possible.

Sincerely,

James Macon
President
Amalgamated Transit Union, Local 998

Cc: County Executive Chris Abele
All Milwaukee County Board of Supervisors

File



AMALGAMATED-TRANSIT UNION

LOCAL 998 • AFFILIATED WITH AFL-CIO

734 North 26th Street Milwaukee, WI 53233 (414) 342-4300 Fax: (414) 342-1998

April 25, 2019

Nate Holton
Director of Diversity and Inclusion
Milwaukee County Transit System
1942 North 17th Street
Milwaukee, WI 53205

JAMES MACON
President

MICHAEL BAUTCH
Vice President

JOHN GROH
Financial Secretary
Treasurer

CASSANDRA COBB
Recording Secretary

Reference: Open Records Request (Non-Represented Workers of M.T.S.)

Dear Nate:

This is an "Open Records Request" for information needed, concerning the non-represented workers of M.T.S.

What is the yearly salary of each non-represented worker of M.T.S.?
What is the job title of each non-represented worker of M.T.S.?

This information is needed as soon as possible.

Sincerely,

James Macon
President
Amalgamated Transit Union, Local 998

Cc: County Executive Chris Abele
All Milwaukee County Board of Supervisors

File



AMALGAMATED-TRANSIT UNION

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MICHAEL BAUTCH
Vice President

JOHN GROH
Financial Secretary
Treasurer

CASSANDRA COBB
Recording Secretary

May 1, 2019

Nate Holton
Director of Diversity and Inclusion
Milwaukee County Transit System
1942 North 17th Street
Milwaukee, WI 53205

Reference: Open Records Request

Dear Nate:

The above-referenced Open Records Request is needed as follows:

- How many buses are in service now?
- How many buses will operate on the road this summer?
- How many buses will operate during the next winter pick?
- How many buses will operate during the "MCTS Next"?

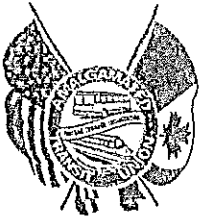
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Sincerely,

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President
Amalgamated Transit Union, Local 998

Cc: County Executive Chris Abele
All Milwaukee County Board of Supervisors

File



AMALGAMATED-TRANSIT UNION

LOCAL 998 • AFFILIATED WITH AELCIO

734 North 26th Street Milwaukee, WI 53233 (414) 342-4300 Fax: (414) 342-1998

May 2, 2019

Nate Holton
Director of Diversity and Inclusion
Milwaukee County Transit System
1942 North 17th Street
Milwaukee, WI 53205

Reference: Open Records Request

Dear Nate:

"Open Records Request" is needed, concerning the outsourcing by Milwaukee County Transit System. What is the cost-savings for M.C.T.S., since the following have been outsourced?

- Family Medical Leave Act (FMLA)
- Workers' Compensation
- Milwaukee County Transit System's Janitorial Service
- Milwaukee County Transit System's Print Department, which has been outsourced to the Milwaukee County House of Correction

This information is needed as soon as possible.

Sincerely,

James Macon
President
Amalgamated Transit Union, Local 998

Cc: County Executive Chris Abele
All Milwaukee County Board of Supervisors

File

JAMES MACON
President

MICHAEL BAUTCH
Vice President

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Treasurer

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Recording Secretary



AMALGAMATED TRANSIT UNION

LOCAL 998 • AFFILIATED WITH AEL-CIO

734 North 26th Street Milwaukee, WI 53233 (414) 342-4300 Fax: (414) 342-1998

May 2, 2019

Nate Holton
Director of Diversity and Inclusion
Milwaukee County Transit System
1942 North 17th Street
Milwaukee, WI 53205

Reference: Open Records Request

Dear Nate:

Open Records Request is needed from **1995 to present**, regarding the following:

How many workers have been hired?
How many non-represented workers have been hired?
How many executive workers have been hired?

This information is needed as soon as possible.

Sincerely,

James Macon
President
Amalgamated Transit Union, Local 998

Cc: County Executive Chris Abele
All Milwaukee County Board of Supervisors

File

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ITS OUR PENSION WE HAVE TO PROTECT IT

1

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Sent: Wednesday, December 05, 2018 3:04 PM
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3

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Alesha

4

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1. Alesha Monk, MTS employee.

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