

Arpeggio

Arpeggio is the official quarterly journal of the Philadelphia Musicians' Union, Local 77, AFM • Fall 2024, Issue No. 21



Official Notice

Any notice of information that appears in this publication will serve as an official notice to the membership.

In This Issue...

<u>Vice President's Report</u>	<u>4</u>
<u>Secretary-Treasurer Report</u>	<u>6</u>
<u>Financial Statement- FY'24</u>	<u>8</u>
<u>Member Activity</u>	<u>20</u>
<u>New Member Spotlight</u>	<u>23</u>
<u>Unfair List</u>	<u>24</u>
<u>General Membership Minutes</u>	<u>25</u>
<u>Executive Board Minutes</u>	<u>27</u>
<u>Instrument For Sale</u>	<u>31</u>



Arpeggio is the official quarterly journal of the Philadelphia Musicians' Union Local 77, AFM

Officers

Ellen Trainer, President
Marjorie Goldberg, Vice President
Jarred Antonacci, Secretary-Treasurer

Executive Board

Rebecca Ansel
Nicole Jordan
Robert Suttman

AFM Convention Delegate

Marjorie Goldberg

Alternate AFM Convention Delegate

Laura Munich

Contact Information

1420 Locust St., Suite 300, Philadelphia, PA 19102
(215) 985-4777 • local77@afm.org
www.local77afm.org

Office Hours

Monday - Thursday 10am-4pm
Friday 10am-1pm

Arpeggio Editor

Jarred Antonacci



Taskforce for the Employment of Musicians, Promotional Organization



**AMERICAN FEDERATION OF MUSICIANS
OF THE UNITED STATES AND CANADA
LEGISLATIVE ACTION FUND**



*Have you changed your address,
phone number, or email lately?
If so, please let the office of Local 77
know immediately.*

Arpeggio Pricing Information

Member Pricing

Business Card (2 x 3) . . . \$50.00
Qtr. Page (4 x 4 ½) \$87.50
Half Page (7 ½ x 4 ½) . . . \$150.00
Full Page (10 x 7 ½) \$250.00

Non-Member Pricing

Business Card (2 x 3) . . . \$100.00
Qtr. Page (4 x 4 ½) \$175.00
Half Page (7 ½ x 4 ½) . . . \$300.00
Full Page (10 x 7 ½) \$500.00

Advertising Guidelines

All advertisements must be submitted in PDF format.
We will not publish the following types of advertisements:

- Travel
- Insurance
- Credit Cards

Your payment can be made via PayPal. Send to local77@verizon.net
or, by check made payable to Local 77, AFM to the following address:

The Philadelphia Musicians' Union Local 77 AFM
1420 Locust Street, Suite 300
Philadelphia, PA 19102

All advertisement requests are subject to the approval of the
Local 77 Executive Board.



Vice President's Message

By Marjorie Goldberg, Vice President



How to Make Your Work Union Work

Why should I be a union member when none of my work is union work?

We get this question a lot and it made me realize it was time for an article about this topic. Many musicians think that if they don't play with a group covered by a Collective Bargaining Agreement (CBA) that union work isn't there for them—this couldn't be further from the truth. As a union member, you have the power to turn your work into union work by using a union single engagement contract. Any single engagement you are booking or being asked to play can be covered by our single engagement contract which is called an [L1 contract](#). The only requirement to file an L1 is that you adhere to the rules and regulations outlined in the [Wage Scale Book](#). All wages paid to musicians must not fall below the minimum pricing listed in the Local 77 Wage Scale Book, which is available on our website.

Why Should I want to put my job on a union contract and have to pay the local work dues?

The ability to receive a pension contribution, and access to the Local 77 payroll service, Playcheck77, Inc. are among the financial benefits of using a union contract. Our pension fund (AFM-EPF) is a multi-employer pension fund, which means that contributions to your pension account cannot be made without a union contract. The work for which pension contributions can be made is not limited to engagements covered by a CBA, but rather all engagements including single engagements where a union contract is in place. When you get invited to play for a private event use the L1 single engagement contract,

“Many venues now require a certificate of insurance (COI), which could cost you as much as \$200 per day. If you choose to use the payroll service and require a COI for your engagement, one can be provided for you free of charge.”

when you get invited to play with a church organist use the L1, when you're contracting an ensemble of any size, use the L1. Musicians who need to stipulate specific requirements in order to play an engagement can do so on page 2 of this contract, under the *ADDITIONAL PROVISIONS* section.

Here is an example of how this works:

You have been invited to play a church service, for which the minimum wage per the Wage Scale Book for that type of engagement is \$207—you can charge more, but you cannot charge less. The next calculation you will need to make is the pension rate which, if you are using the payroll service (which will include a 25% fee on all

monies transmitted through the service), is set at 12.54% or, an additional \$25.96. At this point you would add the price of the engagement (\$207) and the employer pension contribution (\$25.96) together, as well as calculating the 25% (\$58.24) payroll surcharge. The total amount that you would need to charge the client is now \$291.20. The next step is to have the client sign the L1 and to send that to Secretary-Treasurer Antonacci. If you choose to use your own LLC or similar business entity instead of the payroll service, please note that the pension rate is slightly higher at 12.59%, and you will additionally need to complete another form which is referred to as an [LS-1](#). This form states basic information about the engagement—date, time, location, musicians, wages earned, and the pension percentage calculated on those wages. This form, as well as the L1 will need to be submitted to the office, should you choose to forgo using the payroll service.

Playcheck77, Inc. can be a huge benefit to you or your business entity. The service acts as the employer of record for engagements for which it is being utilized. The additional benefits of using the payroll service include the protection of a workers compensation and liability insurance policy, as well as credits toward unemployment (for info re: W2 vs 1099 classification see the end of this article). Many venues now require a certificate of insurance (COI), which could cost you as much as \$200 per day. If you choose to use the payroll service and require a COI for your engagement, one can be provided for you free of charge.

The final step in this process is to forward the signed contract, as well as the payment made payable to Playcheck77, Inc. to S-T Antonacci who will onboard any musicians who are new to the payroll service, which includes setting up their appropriate tax withholdings and direct deposit information. Once payroll is run, the payroll service will automatically deduct your work dues, and will be responsible for the remittance of your pension contribution.

Last year Local 77 member Eric Schweingruber spoke at our general membership meeting about how he has started putting some longtime contracts on a union contract, and just how easy the process was. At our upcoming meeting on October 23rd at 4:30pm, we have another Local

77 member scheduled to discuss how they have been filing single engagement contracts and local recording contracts, all of which have included pension contributions since learning about the process, and the ease at which it can be done.

If you need help filing a contract please contact me or S-T Antonacci—we would be happy to help you.

Have a great Fall and we will see you on October 23rd at 4:30pm!!!

*** When musicians are engaged as sub-contractors and paid on a 1099 instead of a W2, they are responsible for 100% of the Federal Insurance Contributions Act (FICA) charges, which include Social Security and Medicare, which total an additional 15.3%, as well as any applicable local or state taxes. When musicians are classified appropriately as employees and paid on a W2 which include the appropriate tax withholdings, the employer picks up half of the FICA cost, bringing the tax rate for the musician down from 15.3% to 7.65% ***

FOR MORE INFORMATION REGARDING THE FILING OF SINGLE ENGAGEMENT CONTRACTS OR LOCAL LIMITED PRESSING AGREEMENTS CONTACT THE OFFICE OF LOCAL 77.

Secretary-Treasurer's Report

By Jarred Antonacci, Secretary-Treasurer



I hope this edition of Arpeggio finds you in good health and spirits! As you may already know from previous editions of this newsletter, the fiscal year for Local 77 runs from June 1 through May 31. Each summer, it is the duty of my office to engage an independent accountant to prepare the yearly tax filings, which include the Form 990, Labor Management Reports, and the Financial Statement which lists all assets, revenue, investments, and operating expenses for Local 77.

Since I have reported last, there have been a few reallocations to the finances that were in our checking account at Sun Federal. It is important to do everything possible to grow the assets of the local, while still maintaining a fiscally conservative approach with regard to the risk involved. We opened an interest bearing money market account with PNC Bank, which is yielding an average of 4%. Additionally, we took another \$100,000 from the Sun Federal checking account and opened a 12-month Certificate of Deposit, with a variable interest rate averaging 4.5%-5%. These new accounts provide us with an additional opportunity for which we can earn interest on the excess money that is not needed for day-to-day expenses. This helps to keep the balances in our operational checking account to an amount below the FDIC insurance cap of \$250,000.

On the following pages you will find the Financial Statement and the notes to the Financial Statement,

which have been prepared by our independent accounting firm for this past fiscal year ending May 31, 2024. The finances of Local 77 had several positive gains throughout this last year, both in operating revenue, and investments. The assets reported include total cash and investments. The total cash reported as of May 31, 2024 was over 15% higher than 2023, totaling \$528,456. Similarly, our investments increased by more than 18% from \$423,850 to \$501,138. Total assets for Local 77 rose by 9% from 2023 to \$1,505,705.

Operating revenue and investment income also increased from 2023. As of May 31, our member dues income, which includes work dues as well as annual dues, increased by more than 7% to \$863,982. As you may know, Local 77 has a payroll service, Playcheck77, Inc. This service is responsible for reimbursing Local 77 back for the time that my office spends on the administration of the payroll service. The payroll service administration fee due back to Local 77 is 7% of the gross revenue that is run through the service. The payroll service grew exponentially from 2023 to 2024, and so did the fee associated with this growth. In 2023, Local 77 received only \$2,000 back in administration fees, while in 2024 this number ballooned to \$20,389. It is my anticipation that this number will likely triple by the end of FY'25. Along with our increased operating revenue, Local 77 gained more than \$75,000 through our investment allocations which are managed by Barilotti Wealth Strategies, under the guidance of the Local 77 Finance Committee.

As you may know, we recently completed the Philadelphia Orchestra negotiation, which was the largest contributor to our increased operational expenses for 2024. Total legal representation increased by more than 215%, from \$51,867 in 2023 to \$164,342 in 2024. Other large expenses included our AFM International work dues and per capita assessments, which for 2024 increased by 8% to \$161,403.

I encourage you all to attend our upcoming general membership meeting on Wednesday, October 23, 2024 at 4:30pm inside the office of Local 77—there will be food!

Local 77 Balance Sheet

September 30, 2024

Cash in Bank

PNC Money Market.	\$159,160.00
PNC Checking Account.	\$5,000.00
TD Bank Money Market.	\$11,545.80
Sun Federal Checking Account.	\$1,055.53
Sun Federal Savings Account.	\$10.00
Sun Federal Cert of Deposit.	\$101,762.20
TD Bank Checking.	\$245,418.89
Total Cash in Bank.	\$523,952.42

Investments at Fair Value

NY Life Securities LLC.	\$541,589.58
Total Current Assets.	\$1,065,542.00

Fixed Assets- Property & Equipment

Office (Academy House).	\$508,150.32
Furniture and Fixtures	\$12,973.31
Equipment	\$34,862.35
Accumulated Depreciation	(\$77,319.78)

Total Fixed Assets

Property & Equipment.	\$478,666.20
-------------------------------	--------------

Equity

Fund Balance.	\$1,503,531.33
Net Income Fiscal Year To Date.	\$40,676.87

Total Equity. \$1,544,208.20



Joseph L. Whitaker, CPA

ACCOUNTING • TAXES • AUDITS • FINANCIAL SOLUTIONS

INDEPENDENT ACCOUNTANT'S REVIEW REPORT

To the Executive Board
Philadelphia Musicians' Union Local 77, A.F.M.
Philadelphia, PA

We have reviewed the accompanying financial statements of Philadelphia Musicians Union Local 77, A.F.M. (a non-profit organization) which comprise the statements of assets, liabilities, and net assets - modified cash basis as of May 31, 2024 and 2023, and the related statements of revenues, expenses and changes in net assets - modified cash basis for the years then ended, and the related notes to the financial statement. A review includes primarily applying analytical procedures to management's financial data and making inquiries of management. A review is substantially less in scope than an audit, the objective of which is the expression of an opinion regarding the financial statements as a whole. Accordingly, we do not express such an opinion.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with the modified cash basis of accounting; this includes determining that the modified cash basis of accounting is an acceptable basis for the preparation of the financial statements in the circumstances. Management is also responsible for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement whether due to fraud or error.

Accountant's Responsibility

Our responsibility is to conduct the review engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the Institute of Certified Public Accountants. Those standards require us to perform procedures to obtain limited assurance as a basis for reporting whether we are aware of any material modifications that should be made to the financial statements for them to be in accordance with the modified cash basis of accounting. We believe that the results of our procedures provide a reasonable basis for our conclusion. We are required to be independent of Philadelphia Musicians Union Local 77, A.F.M. and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements related to our review.

Accountant's Conclusion

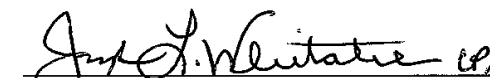
Based on our reviews we are not aware of any material modifications that should be made to the accompanying financial statements in order for them to be in conformity with the modified cash basis of accounting.

Basis of Accounting

We draw attention to Note 2 of the financial statements, which describes the basis of accounting. The financial statements are prepared in accordance with the modified cash basis of accounting, which is a basis of accounting other than accounting principles generally accepted in the United States of America. Our conclusion is not modified with respect to this matter.

Supplementary Information

The supplementary information included in the Schedules of Operating Expenses is presented for purposes of additional analysis and is not a required part of the basic financial statements. The information is the responsibility of management and was derived from, and relates directly to, the underlying accounting and other records used to prepare the financial statements. The supplementary information has been subjected to the review procedures applied in our review of the basic financial statements. We are not aware of any material modifications that should be made to the supplementary information. We have not audited the supplementary information and do not express our opinion on such information.


Joseph L. Whitaker, CPA
Springfield, PA
July 31, 2024

PHILADELPHIA MUSICIANS' UNION LOCAL 77, A.F.M.

Statements of Assets, Liabilities and Net Assets

Modified Cash Basis

May 31, 2024 and 2022

(See Independent Accountants' Review Report & Notes to Financial Statements)

ASSETS

	<u>2024</u>	<u>2023</u>
Current Assets		
Cash	\$ 528,456	\$ 457,062
Investments	501,138	423,850
Interest/Dividends receivable	1,184	1,138
	<u>1,030,778</u>	<u>882,050</u>
Property and Equipment		
Building	503,150	503,150
Furniture and fixtures	12,973	12,671
Office equipment	29,922	29,922
	<u>546,045</u>	<u>545,743</u>
Less: accumulated depreciation	71,118	48,378
	<u>474,927</u>	<u>497,365</u>
Total Assets	<u>\$ 1,505,705</u>	<u>\$ 1,379,415</u>
<u>LIABILITIES AND NET ASSETS</u>		
Current Liabilities		
Credit card payable	\$ 2,174	\$ 1,582
Total Current Liabilities	<u>2,174</u>	<u>1,582</u>
Net Assets - unrestricted	<u>1,503,531</u>	<u>1,377,833</u>
Total Liabilities and Net Assets	<u>\$ 1,505,705</u>	<u>\$ 1,378,415</u>

PHILADELPHIA MUSICIANS' UNION LOCAL 77, A.F.M.

Statements of Revenue, Expenses and Changes in Net Assets

Modified Cash Basis

May 31, 2024 and 2023

(See Independent Accountants' Review Report & Notes to Financial Statements)

	<u>2024</u>	<u>2023</u>
Operating Revenue		
Member dues	\$ 863,982	\$ 804,989
Grant revenue	--	4,860
Administrative fees	20,389	2,000
Advertising income	1,088	1,450
	<u>885,459</u>	<u>813,299</u>
Operating Expenses	<u>839,561</u>	<u>670,913</u>
	45,898	142,386
Investment Income (Loss)		
Interest and dividends	13,410	10,117
Realized gain(loss) on sale of investments	5,183	(60,061)
Unrealized investment gain	66,929	52,058
	<u>85,522</u>	<u>2,114</u>
Less: Investment fees	5,722	5,031
	<u>79,800</u>	<u>(2,917)</u>
Change in Net Assets	125,698	139,469
Net Assets - beginning of year	<u>1,377,833</u>	<u>1,238,364</u>
Net Assets - end of year	<u>\$ 1,503,531</u>	<u>\$ 1,377,833</u>

PHILADELPHIA MUSICIANS' UNION LOCAL 77, A.F.M.

Notes to Financial Statements

May 31, 2024 and 2023

(See Independent Accountants' Review Report)

PHILADELPHIA MUSICIANS' UNION LOCAL 77, A.F.M.

Notes to Financial Statements

May 31, 2024 and 2023

(See Independent Accountants' Review Report)

Note 2 - Summary of Accounting Policies (continued)

Note 1 - Nature of Activities

The Philadelphia Musicians' Union Local 77 A.F.M was established for the purpose of negotiating working conditions, wages, and benefits for its members. The organization represents musicians in Philadelphia County, along with specified communities in Bucks, Delaware, and Montgomery Counties in Pennsylvania and Burlington and Camden Counties in New Jersey. Members pay annual dues and contribute working dues to the Union based upon a percentage of local scale wages as established under a collective bargaining agreement.

Note 2 - Summary of Accounting Policies

Basis of Accounting

The financial statements of the Union are prepared under the modified cash basis of accounting, which is a comprehensive basis of accounting other than generally accepted accounting principles. Consequently, revenue is recognized when received, rather than when earned or due, and expenses are recognized when paid rather than when the obligation is incurred.

In addition, purchases of fixed assets are capitalized, related depreciation is recorded, investments in marketable securities are reported at fair market value and the related change in fair value is included in investment income.

Estimates

The preparation of financial statements in conformity with the modified cash basis of accounting requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results may differ from those estimates.

Cash and Cash Equivalents

The Union considers cash in depository accounts and short term investments issued with an original maturity of three months or less to be cash equivalents.

Certificate of Deposit

A certificate of deposit in the amount of \$100,000 was included in cash equivalents at May 31, 2024. The certificate is for one year with a maturity date of May 23, 2025. The annual percentage yield on the account is 4.99%.

Fixed Assets and Depreciation

Fixed assets are stated at cost. Expenditures for repairs and maintenance are charged to expense as incurred.

Depreciation is determined using the straight line method over the estimated useful lives of the related assets as follows:

	<u>Years</u>
Building	39
Furniture and fixtures	5-7
Office equipment	5-7

Depreciation expense for the years ended May 31, 2024 and 2023 was \$22,739 and \$24,117, respectively.

Advertising Cost

The Union charges to expense the cost of advertising as incurred. Advertising expense for the years ended May 31, 2024 and 2023 was \$25,341 and \$24,483, respectively.

Income Taxes

The Union is qualified under Internal Revenue Service code section 501(c) (5) as a tax exempt labor organization; as such a provision for income taxes is not provided.

The organization files income tax returns in the U.S. federal jurisdiction, and is no longer subject to examinations by tax authorities for years ending before May 31, 2020.

The Union is subject to routine audits by the Internal Revenue Service, however, there are no audits for any tax periods currently in progress. For the years ended May 31, 2024 and 2023, no interest or penalties were required to be recognized.

PHILADELPHIA MUSICIANS' UNION LOCAL 77, A.F.M.

Notes to Financial Statements

May 31, 2024 and 2023

(See Independent Accountants' Review Report)

Note 2 - Summary of Accounting Policies (continued)

Investment Valuation and Income Recognition

Investments in a registered investment company are recorded and reported at fair value based on quoted market prices of the the shares held as of May 31, 2024 and 2023. Investments in certificates of deposit and government bonds are reported at fair values based on reported market value.

Purchases and sales of securities are recorded on a trade-date basis. Interest is recorded when earned. Dividends are recorded on the ex-dividend date. Realized and unrealized gains and losses are included in the statements of revenue and expenses.

Subsequent Events

Management has evaluated subsequent events through July 31, 2024, the date on which the financial statements were available to be issued. Management has determined that no additional disclosures were necessary.

Note 3 - Concentrations of Credit Risks

The Union maintains cash balances at a financial institution. The accounts at the institution are insured by the Federal Deposit Insurance Corporation up to \$250,000.

The Union is subject to collective bargaining agreements covering its labor force. Working dues remitted by the Philadelphia Orchestra for the years ended May 31, 2024 and 2023 represented 81% and 82%, respectively, of total dues received.

PHILADELPHIA MUSICIANS' UNION LOCAL 77, A.F.M.

Notes to Financial Statements

May 31, 2024 and 2023

(See Independent Accountants' Review Report)

Note 4 - Grant Revenue

In January 2023, the Union obtained a grant from the American Federation of Musicians in the amount of \$4,860. These funds were utilized to engage a third party organizer to assist with the modernization and implementation of a member orientation program for current members and recruitment of new members.

Note 5 - Real Estate Owned

On May 22, 2020, the Union purchased real estate located at the Academy House located at 1420 Locust Street, Philadelphia, PA. The facility was renovated and on April 1, 2022 the union relocated its office and opened the facility to its members.

Note 6 - Investments and Fair Value Measurements

As discussed in Note 2 the financial statements are presented under the modified cash basis of accounting. Because investments are stated at fair value, accounting principles generally accepted in the United States establish a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value.

This hierarchy consists of three broad levels: Level 1 inputs consist of unadjusted quoted prices in active markets for identical assets, Level 2 inputs consist of observable inputs other than quoted prices for identical assets, and Level 3 inputs are unobservable for the investment and include situations where there is little or no market activity in the investment.

The Union uses appropriate valuation techniques based on the available inputs to measure the fair value of its investments. When available, the Union measures fair value using Level 1 inputs because they generally provide the most reliable evidence of fair value.

PHILADELPHIA MUSICIANS' UNION LOCAL 77, A.F.M.

Notes to Financial Statements

May 31, 2024 and 2023

(See Independent Accountants' Review Report)

Note 6 - Investments and Fair Value Measurements (continued)

The following table sets forth by level, within the fair value hierarchy, the Union's investments at fair value as of May 31, 2024 and 2023.

<u>As of May 31, 2024</u>	<u>Assets Measured At Fair Value</u>	<u>Fair Value Level 1</u>
Money market funds	\$ 10,822	\$ 10,822
Equity funds	291,052	291,052
Fixed income funds	102,014	102,014
Mutual funds	97,250	97,250
	<u>\$ 501,138</u>	<u>\$ 501,138</u>

<u>As of May 31, 2023</u>	<u>Assets Measured At Fair Value</u>	<u>Fair Value Level 1</u>
Money market funds	\$ 6,531	\$ 6,531
Equity funds	238,999	238,999
Fixed income funds	91,246	91,246
Mutual funds	87,074	87,074
	<u>\$ 423,850</u>	<u>\$ 423,850</u>

Note 7 - Multiemployer Defined Benefit Pension Plan

The Union contributes to the American Federation of Musicians & Employers' Pension Plan (AFM&EPP) under the terms of collective-bargaining agreements that cover its administrative staff, executive board and officers.

The risks of participating in these multiemployer plans are different from single-employer plans in the following aspects:

- Assets contributed to the multiemployer plan by one employer may be used to provide benefits to employees of other participating employers.

PHILADELPHIA MUSICIANS' UNION LOCAL 77, A.F.M.

Notes to Financial Statements

May 31, 2024 and 2023

(See Independent Accountants' Review Report)

Note 7 - Multiemployer Defined Benefit Pension Plan (continued)

- If a participating employer stops contributing to the plan, the unfunded obligations of the plan may be borne by the remaining participating employers.
- If the Union chooses to stop participating in its multiemployer plan, the Union may be required to pay the plan an amount based on the underfunded status of the plan, referred to as a withdrawal liability.

The Union has determined that the multiemployer defined benefit pension plan covering its employees is not individually significant. The total contributions made to the multiemployer defined benefit pension plan for the years ended May 31, 2024 and 2023 were \$30,087 and \$25,260, respectively.

Note 8 - Related Party Transactions

Playcheck 77, Inc., a Pennsylvania corporation, was established in April 2021 and operations began in May 2022. The entity operates as a payroll service for the professional musicians and entertainers exclusively for the assistance and convenience of the Local 77 members. Playcheck 77, Inc. acts as the employer of record for the purpose of remitting contributions to the A.F.M. Pension Fund on behalf of the musicians and entertainers in their dealings with individuals, corporations and other groups that wish to utilize their services.

The Union performs administrative services for Playcheck 77, Inc. The services include the collection of payroll and related withholdings, union dues and pension contributions; record keeping related to the participants in the program and maintenance of the books and records. Administrative services collected for the years ended May 31, 2024 and 2023 was \$20,389 and \$2,000, respectively.

PHILADELPHIA MUSICIANS' UNION LOCAL 77, A.F.M.

Notes to Financial Statements

May 31, 2024 and 2023

(See Independent Accountants' Review Report)

Note 9 - Risks and Uncertainties

The Union invests in various investment securities. Investment securities are exposed to various risks such as interest rate, market, and credit risks. 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 change could materially affect investment account balances and the amounts reported in the statement of assets, liabilities and net assets.

PHILADELPHIA MUSICIANS' UNION LOCAL 77, A.F.M.

Schedules of Operating Expenses

Modified Cash Basis

May 31, 2024 and 2023

(See Independent Accountants' Review Report)

	<u>2024</u>	<u>2023</u>
Administrative salaries	\$ 52,541	\$ 49,429
Executive board salaries	32,725	30,787
Officers salaries	156,786	142,795
Payroll taxes	20,978	20,929
Employee benefits	42,346	41,860
Pension expense	30,087	25,260
Organizer fees	19,867	21,300
Advertising	25,341	24,483
Bank charges	2,039	2,488
Computer expense	4,748	4,418
Condo fees	20,985	15,908
Conferences and conventions	32,469	11,527
Contributions	500	565
Depreciation	22,739	24,117
Dues and subscriptions	729	3,185
Equipment maintenance	4,510	3,293
Insurance	6,692	5,301
International and per capita assessments	161,403	149,452
Arbitration expenses	325	325
Negotiation expenses	350	--
Office supplies and expense	8,320	8,895
Postage and courier fees	407	915
Professional fees:		
Accounting and compliance	12,790	8,140
Legal - local representation	23,732	15,063
Legal - orchestra negotiations	140,610	36,804
Public relations	1,567	2,415
Rent	--	1,562
Repairs and maintenance	1,326	2,972
Strike fund	7,425	7,425
Telephone	5,224	8,839
Utilities	--	461
Total	<u>\$ 839,561</u>	<u>\$ 670,913</u>

Membership Activity

New Members

1. Bian, John • 1834 Gerrit Street, Philadelphia, PA 19146 • (651) 226-4273
jbian.violin@gmail.com • Violin
2. Dickson, Abigail • 1518 Spruce Street, Apt. 2A, Philadelphia, PA 19102 • (210) 784-9855
abigail.g.dickson@gmail.com • Violin, Viola, Guitar, Vocals
3. Heaton, Eliot • 1701 Federal Street Apt. 403, Philadelphia, PA 19146 • (315) 719-5191
erhviolin@gmail.com • Violin, Viola
4. Hsieh, Mu-Chen • 1425 Locust Street, #19B, Philadelphia, PA 19102 • (978) 809-8923
violinjessica@gmail.com • Violin
5. Huber, Sabrina • 108 McLaughlin Drive, Aston, PA 19014 • (267) 253-4816
frnchorn@hotmail.com • French Horn
6. Kim, Ki Won • 4040 Presidential Blvd. Apt 2809, Philadelphia, PA 19131 • (808) 397-4612
kiwon0801@gmail.com • Violin
7. Klugman, Daniel • 3225 W. Bruce Drive, Dresher, PA 19025 • (215) 285-8579
dk.horn24@gmail.com • French Horn
8. Miller, Emerson • 14221 Burning Bush Lane, Silver Spring, MD 20906 • (561) 229-6406
emerson.miller1@gmail.com • French Horn
9. Williams, Anwar • 8343 Walker St., Philadelphia, PA 19136 • (267) 887-8783
canwarwilliams@gmail.com • Cello

Resigned

- | | | |
|----------------------|-------------------------------|---------------------|
| 1. Clark-Nedd, Dacia | 5. Law, Jonathan | 9. Schairer, Joshua |
| 2. Frazier, Ruth | 6. Lombo, Alejandro | 10. Vaughen, James |
| 3. Grillo, John | 7. Martinez, Olivia | |
| 4. Jedynecki, Iwo | 8. Pajaro-van De Stadt, Flava | |

Reinstated

- | | | |
|---------------------------|----------------------------|--------------------------|
| 1. Ando, Elizabeth | 11. Hobbs-Gardner, Cecelia | 21. Polanco-Aviles, John |
| 2. Cooper, Warren | 12. Huebner, Robert | 22. Raves, Jeremy |
| 3. Day, Alexandra | 13. Hussey, Sarah | 23. Reichert, Edward |
| 4. Deeley, Raymonda | 14. Joselin, Vilme | 24. Segal, Rachel |
| 5. Disarlo, Martha | 15. Karppala, Danielle | 25. Shaw, Jonathan |
| 6. Douglas, Alberta | 16. Kiang, Ruth | 26. Sheets, David |
| 7. Gamble, Kenneth | 17. King, Denise | 27. Soberick, Timothy |
| 8. Gamble, Lance | 18. Lee, Meena | 28. Tate, Frances |
| 9. Grossman-Pollak, Marcy | 19. McCommon, Barry | 29. Taylor, Louis |
| 10. Herz, Allison | 20. Miller, Erica | 30. Zengolewicz, Richard |

2024 Member Dues Price List

Annual Regular Member Dues: \$200

Student Members: \$100

Must be registered in an accredited school, college or university. When no longer a student, they convert to Regular Member without additional fees. Student Members have the same rights and obligations as Regular members, subject to all AFM and Local rules, regulations and Bylaws (Local/AFM fee waived).

Youth Members: \$100

Applicants must be age 20 or younger. Youth Members have the same rights and obligations as Regular Members, subject to all AFM and Local rules, regulations and Bylaws (Local/AFM fee waived).

Life Members: \$100

Minimum age requirement is 65 years old. Must have 35 cumulative years of AFM membership.



Helping Musicians Buy and Sell Homes for Over a Decade.

We work collaboratively with Sellers and Buyers in and around the Philadelphia Region.

Jonathan Fink

REALTOR®

M 215.805.5276 | O 267.435.8015

jonathan.fink@compass.com

jonathanfinkgroup.com



JONATHAN FINK GROUP

New Member Spotlight



Dennis Strawley, Clarinet

Dennis Strawley is originally from the Philadelphia region, where he attended Settlement Music School. In addition to making his solo debut with the Philadelphia Orchestra at the age of 17, Dennis earned his Bachelor of Music degree from the Curtis Institute of Music. As the former Concertmaster and Principal Clarinetist of The U.S. Army Band and Orchestra “Pershing’s Own” in Washington, D.C., he appeared as soloist with the Orchestra and Concert Band on 61 performances in venues that include Avery Fisher Hall at Lincoln Center, Strathmore Music Center, The Clarice Smith Performing Arts Center at the University of Maryland and The Kennedy Center in Washington, D.C. Dennis has performed with The Philadelphia Orchestra, National Symphony, Baltimore Symphony, Baltimore Chamber Orchestra, Pennsylvania Ballet, Delaware Symphony, Delaware Opera, Harrisburg Symphony, Annapolis Symphony, Annapolis Opera, Williamsburg Symphony, Virginia Ballet, Wolf Trap Orchestra Washington, D.C., American Festival Pops Orchestra, Chamber Orchestra of Philadelphia, Mid-Atlantic Symphony, Washington Opera Society, Reading Symphony, Lancaster Symphony and The South Florida Symphony Orchestra. Dennis has performed in concert or as a soloist in every Continental U.S. State, Puerto Rico, Canada, Australia and China.



Danielle Karppala, Cello

Danielle Karppala is a freelance cellist with a rich background in orchestral music. She has been engaged regularly by a wide variety of orchestras including the National Symphony Orchestra, Baltimore Symphony Orchestra, and other regional ensembles in Pennsylvania and Maryland. Danielle earned a Master of Music degree from the Hartt School of Music and a Performance Diploma from Penn State. As a native of Pennsylvania, she looks forward to connecting with fellow artists and contributing to the vibrant music scene in Philadelphia.



Anwar Zo Williams, Cello

Originally from Philadelphia, cellist **Anwar Zo Williams** is a proud Philadelphia Music Alliance for Youth (PMAY) Alumni. Currently enrolled at Temple University, Anwar is pursuing his Bachelor of Music degree and is a student of Philadelphia Orchestra cellist John Koen. He is passionate about constantly learning and growing as a musician. Anwar enjoys his performance opportunities at Temple and has a particular affinity for modern music by composers that study at Temple University. On the weekends, Anwar volunteers at the Community Music Scholars Program at Temple University. His passion is to give back to his community. Anwar believes that it is important to give back to others who are less fortunate, and hopes to use his musical talents as a driving force behind his passion to make a difference.

UNFAIR

*Karen Corbin, CEO; Encore Series, Inc.
The Philly POPS*

Gina Coso, Jersey Gina Entertainment LLC

*It is a violation of Article 8, Section 3 of the
AFM Bylaws to work for an organization on the International Unfair List.*

Article 8, Section 3: Members shall not render musical services for organizations, establishments, or people who are listed on the International UnfairList or for any other organization, establishment, or person who the member knew or reasonably should have known is owned or effectively controlled by an organization, establishment, or person listed on the International Unfair List. Any member who violates this Section shall be subject to penalties in accordance with Article 11, Section 13 [See Article 13, Section 4]

*Please contact the Local 77 office if you are asked
to play any engagement by an employer on the International Unfair List.
Our strength is in our solidarity.*

General Membership Meeting Minutes

May 9, 2024


President Trainer confirmed that a quorum was reached. 12 members in attendance in person, and 13 members in attendance online. President Trainer called the meeting to order at 5:36pm. President Trainer read through the meeting rules. A motion was made and seconded to approve the meeting rules. President Trainer addressed the recent news articles related to sexual assault at the New York Philharmonic. President Trainer urged the importance of bargaining protections for substitutes and extras into the various collective bargaining agreements. She additionally stated that the AFM International office should be offering continuing education on building inclusive and respectful workplaces. A motion was made and seconded to approve the minutes from the February 29, 2024 general membership meeting. President Trainer welcomed new Executive Board member Nicole Jordan, who has replaced David Fay. S-T Antonacci presented the financial report. The financial reported included a revenue comparison of Qtr.1 from 2023 to Qtr. 1 from 2024. Membership dues and investment income increased from 2023, bringing the total net assets as of March 31, 2024 to \$1,460,795, which reflects an increase of 8%. S-T Antonacci presented the operating expense comparison for the same time frame. The total expenses from Qtr. 1 ('23) to Qtr. 1 ('24) increased by 27%. This increase is largely due to the Philadelphia Orchestra negotiation, which incurred a legal expense of \$41,596 for Qtr. 1 ('24), which reflects an increase of over 500% from Qtr. 1 from the previous year. The net income comparison decreased by 14% from '23 to '24. S-T reported on the membership activity since the February meeting. To date, Local 77 has 800 members—758 are in good standing while 42 are

suspended. S-T Antonacci reported that the AFM International Representative for the Eastern Territory, Alice Bish, will be coming to Philadelphia in October to perform an Operational Compliance Review. This three-day review is standard practice from the AFM International office, and usually takes place every five years. S-T Antonacci reported on the recent activity with the Local 77 payroll service, Playcheck77, Inc. During the first quarter of 2024, the total amount of revenue exceeded \$506,000. This included in part, payroll to musicians in the amount of \$342,084, and pension payments totaling \$44,320. S-T Antonacci urged all of the members to run their jobs through the payroll service. S-T Antonacci introduced American Income Life Public Relations Specialist Julie Freeman. Ms. Freeman presented a no-cost benefits summary that is now available to all Local 77 members, which include a discount card, child safe kits, 'medifact' kits, accidental death & dismemberment coverage, and many other services. Local 77 will be finalizing the paperwork to establish our partnership and in the coming weeks, members will be receiving communication from Local 77 regarding this benefit. Nate West presented the Philadelphia Orchestra (POA) update. Mr. West reported that the POA musicians have enjoyed a really successful season. The POA saw an increase of diversity of composers this past season, and the organization hired four new members. POA management anticipate hiring another four or so musicians in the Fall. Mr. West reported that the musicians of the orchestra are initiating conversations surrounding safety in the workplace. He additionally stated that the members committee is taking a leadership role in making sure that management does more than legally 'checking the box' surrounding the cultivation of a safe workplace. The organization as a whole continues to work

on the cultivation of a workplace that is safe and free of harassment. Fred Weiss reported on the Walnut Street Theatre. Mr. Weiss reported that Local 77 and the musicians of the Walnut are in the process of meeting to discuss the first draft of a contract proposal as they work to enter negotiations in the coming weeks. Mr. Weiss explained that there were a lot of positive gains in the last negotiation, and he is hoping that this negotiation can move forward in a productive and healthy way. Geoff Deemer presented the report on the Chamber Orchestra of Philadelphia (COP). COP management and Local 77 recently completed negotiations on a new three-year contract that includes a minimum service guarantee and raises throughout the life of the contract. Mr. Deemer reported that COP Music Director Dirk Brossé will be stepping down at the end of this current season, and will be succeeded by maestro David Hayes as their incoming Music Director. Mr. Deemer reported on Opera Philadelphia (OP). Recently OP musicians celebrated the long-time tenure of harpist Sophie Bruno Labiner, who retired after 40 seasons in the Opera Orchestra. Mr. Deemer reported that OP Executive Director David Devan will be stepping down at the end of this season and will be succeeded by Anthony Roth Costanzo. Executive Board member Rebecca Ansel reported on the Philadelphia Ballet. The Ballet is about to wrap up their current season with The Prodigal Son and The Dream at the Academy of Music. Since the previous meeting, the Ballet orchestra hired a new principal clarinetist. S-T Antonacci reported on the Academy of Vocal Arts (AVA) in place of their orchestra committee chair, Sunny Herz. Ms. Herz stated that Local 77 and AVA management are entering negotiations. AVA views the orchestra as central to their mission of creating high-quality performance opportunities for their vocal

students. Her report additionally stated that their long time Executive Director Kevin McDowell has stepped down, and been replaced with Mr. Scott Guzielek. Since Mr. Guzielek's arrival, he has been very amendable to the musician's requests. Since his arrival, they have received new and improved chairs, a protective barrier at the edge of the stage, as well as new lighting outside the exit door. Executive Board member and Philadelphia Chapter President of the Theatre Musicians Association (TMA), Mr. Robert Suttman reported that there is an organizing campaign actively occurring at Media Theater, under the guidance of Local 21 (Wilmington, DE). Local 77 members and Local 21 members alike, are both part of the new potential bargaining unit. Locally, EB Suttman reported that TMA Vice President Matt Gallagher has stepped down, and his position has been filled by TMA Board member Fred Weiss. Mr. Suttman thanked Mr. Gallagher for his service as a founding officer of the Philadelphia chapter. Mr. Suttman reported that the ongoing negotiations between Local 77 and the Shubert Organization (Forrest Theatre) have been put on hold because the AFM International office is currently in negotiations for the national touring contract called Pamphlet B. Mr. Suttman stated that it makes more sense for negotiations to resume with the Shubert Organization after the Pamphlet B negotiations are concluded, to avoid any potential contractual conflicts between Pamphlet B and the Shubert Organization contract for the Forrest Theatre. Mr. Suttman reported that Philadelphia is in the running as a potential host city for the 2024 national TMA conference. Vice President Marjorie Goldberg reported on the No Name Pops (NNP). VP Goldberg reported on a recent performance at the Kimmel Center where the NNP honored the life and legacy of their founder, Peter Nero. VP Goldberg additionally reported that the Nero family and their legal counsel are currently in discussions with the NNP legal counsel regarding a potential licensing agreement for the use of the name 'The Philly POPS'. VP

Goldberg reported that the Nero family has additionally agreed to donate Mr. Nero's entire music library to the NNP, which includes upwards of twelve filing cabinets. VP Goldberg reported on the Music Performance Trust Fund (MPTF). MPTF sponsored performances for Jazz Appreciation Month (April) at 100%. During the month of April, MPTF sponsored 58 performances, which included 282 units of work for musicians which resulted in over \$84,000 in revenue through the payroll service. VP Goldberg reported that MPTF additionally will be funding performances at 100% for Juneteenth. VP Goldberg reported on Local 77's support of the 2024 Jewish Labor Seder, which took place on April 25, 2024. She additionally reported that Local 77 musicians will be playing for the fourth annual George Floyd Memorial on May 25, 2024 on the north side of City Hall. Local 77 Inclusion, Diversity, Equity, Access, and Solidarity (IDEAS) chairperson, Laura Munch presented the IDEAS Council report. Ms. Munich reported on the state of the IDEAS council since its creation over four years ago. She encouraged all members interested in participating on the IDEAS Council to reach out to her or the office of Local 77 directly. President Trainer opened the floor for the members to speak. A motion was made and seconded to adjourn the meeting. Meeting adjourned at 7:04pm.




**JOIN THE
TEMPO
CLUB**

THE TASKFORCE FOR EMPLOYMENT OF
MUSICIANS, PROMOTIONAL ORGANIZATION

**THE TEMPO CLUB
CAMPAIGN**

Invest in Your Union's
Future While Expanding
Freedom of Speech for
American Musicians



Taskforce for Employment of Musicians, Promotional Organization

AFM TEMPO may accept contributions only from members of the American Federation of Musicians of the United States and Canada, executive and professional staff of AFM and its affiliates, and their immediate families living in the same household. Only United States citizens and lawful permanent United States residents may contribute. AFM TEMPO makes contributions and expenditures in federal, state and local elections. All contributions are voluntary and an individual may refuse to contribute without any reprisal. Any guideline contribution amount is merely a suggestion, and an individual is free to contribute more or less and AFM will not favor or disadvantage the individual by reason of the amount of a contribution or a decision not to contribute. Federal law requires us to use our best efforts to collect and report the name, mailing address, occupation and name of employer of individuals whose contributions exceed \$200 in a calendar year. Contributions and gifts to AFM TEMPO are not tax deductible.

For more information, please contact the
AFM Government Relations Office on 202-274-4756.
Or email AFM Legislative Political Director
Alfonso Pollard at apollard@afm.org

Executive Board Minutes

July 12, 2024

PRESENT: President Trainer, S-T Antonacci, VP Goldberg, and Executive Board members Rebecca Ansel, Nicole Jordan, and Robert Suttman are present. **PROCEEDINGS:** Meeting called to order at 10:03am. The Executive Board reviewed the minutes from the previous meeting. A motion was made and seconded to approve the minutes as amended. S-T Antonacci reported on the profit and loss as well as the balance sheet from June. A motion was made and seconded to approve the financial report. S-T Antonacci reported on the member activity since the previous meeting. To date, Local 77 has 806 members. 772 are in good standing and 34 are suspended. A motion was made and seconded to approve one new member applicant. A discussion was held on the list of members that are set to be suspended and expelled. S-T Antonacci urged the board to contact anyone they may know on the list, and remind them about their membership dues. S-T Antonacci reported on his attendance at the first Philadelphia Council AFL-CIO FIFA 2026 World Cup labor committee meeting. In 2026, Philadelphia will be one of the host cities for the FIFA World Cup. Phila. AFL-CIO President Danny Bauder reported that he is a likely candidate for the Philadelphia FIFA '26 host committee, which will help ensure that unionized labor be utilized for any and all events surrounding the FIFA World Cup. S-T Antonacci reported that another meeting will take place in the beginning of August, and he will update as more information becomes available. A discussion was held on Local 77 sponsoring and attending a political fundraising event for Pennsylvania State Representative Joe Ciresi. S-T Antonacci reported that the Summer edition of the newsletter will be going to print within the next week, and it is set to hit mailboxes by the end of July. S-T Antonacci reported on the negotiations between Local 77 and the Academy of

Vocal Arts. VP Goldberg reported on a recent meeting between Local 77 and the new Executive Director for Opera Philadelphia, Anthony Costanzo. Local 77 is hopeful that the recent change in leadership will rejuvenate Opera Philadelphia. VP Goldberg reported that the No Name Pops (NNP) musicians recently performed at Citizens' Bank Park for a Phillies game, and additionally the NNP announced another performance in the suburbs at Immaculata University in Malvern PA which is set to take place in September. President Trainer reported on a meeting held with NNP Executive Director Matt Koveal regarding a potential sponsor for future performances. EB Suttman reported on the Theatre Musicians' Association (TMA) Philadelphia Chapter. There will be a Philadelphia Chapter membership meeting in the coming weeks. EB Suttman reported that nationally, the TMA is preparing for their upcoming conference in Portland, OR and will be revamping their website ahead of time. EB Jordan reported on the Philadelphia Orchestra (POA). Currently the POA are about to conclude their residency in Vail, CO. Upon their return to Philadelphia, they will be performing a series of concerts at the Mann Center. EB Jordan reported that POA management are generally getting more cooperative in accepting a collaborative way of dealing with issues as they arise within the organization. Executive session entered from 11:28am-11:58am. President Trainer reported that she received an invitation to an upcoming political endorsement event with the Pennsylvania AFL-CIO, in Harrisburg, PA. A discussion was held on whether or not representatives from Local 77 should travel for the event. A motion was made and seconded to adjourn the meeting. Meeting adjourned at 12:08pm.

July 26, 2024

PRESENT: President Trainer, S-T Antonacci, VP Goldberg, and Executive Board members Rebecca Ansel, and Nicole

Jordan are present. **PROCEEDINGS:** Meeting called to order at 10:05am. The Executive Board reviewed the minutes from the previous meeting. A motion was made and seconded to approve the minutes as amended. S-T Antonacci reported on the member activity since the previous meeting. To date, Local 77 has 806 members. 779 are in good standing and 27 are suspended. A motion was made and seconded to approve one new member applicant. A discussion was held on the upcoming list of members slated to be suspended and/or expelled. S-T Antonacci reported that both he and President Trainer attended a fundraising event for State Representative Joe Ciresi. Representative Ciresi hired live union entertainment for this engagement. Local 77 began negotiations with the Walnut Street Theatre. Both representatives from the bargaining unit as well as local officers are on the negotiating team, and everyone is looking forward to future meetings. S-T Antonacci updated the board on the status of the Academy of Vocal Arts (AVA) negotiation. AVA management is reviewing the final contract draft and Local 77 is awaiting their response before scheduling a meeting to review the document with the bargaining unit. President Trainer reported on Opera Philadelphia. She reported that management has not met their service guarantees to their musicians, as per their contract, and that they are trying to create performance opportunities to meet that threshold with only thirty days' notice. Management is suggesting that any musician who is unable to perform, will not be paid for those performances for which they were asked and subsequently turned down. It is the position of Local 77 and the committee that this is a grievable offense, and Local 77 will be following up in the very near future with a decision on how to proceed. VP Goldberg reported that the No Name Pops will be performing one Christmas show in the Fall of 2024, featuring conductor Na'zir McFadden. President Trainer reported on

a local organizing campaign that is in the final stages before going public. EB Jordan reported on the Philadelphia Orchestra (POA). The POA is currently in their residency at The Mann Center. Executive session entered from 10:44am–11:23am. VP Goldberg reported that President Trainer is going to the Regional Orchestra Players' Association (ROPA) Conference in San Francisco. She additionally reported that Local 77 has been asked to host the conference next year. The conference usually happens at the end of July, and there would be a small cost to the Local. A discussion ensued on the possibility of hosting the 2025 conference. S-T Antonacci reported that the Summer edition of the Local 77 newsletter is going to print and is expected to hit mailboxes by the beginning of August. A discussion was held on scheduling the next board meeting, which is slated to be held on Wednesday, August 7, 2024 at 2pm. A motion was made and seconded to adjourn the meeting. The meeting was adjourned at 11:38am.

August 7, 2024

PRESENT: President Trainer, S-T Antonacci, VP Goldberg, and Executive Board members Rebecca Ansel, and Nicole Jordan are present. **PROCEEDINGS:** Meeting called to order at 2:05pm. A discussion ensued on the Philadelphia Orchestra management regarding overtime payment issues for two musicians. Executive session entered from 2:06pm–2:30pm. President Trainer excused at 2:30pm. The Executive Board reviewed the minutes from the previous meeting. A motion was made and seconded to approve the minutes as amended. S-T Antonacci reported on the member activity since the previous meeting. To date, Local 77 has 792 members. 776 are in good standing and 16 are suspended. A motion was made and seconded to approve one new member applicant. S-T Antonacci reported that the Harris campaign held a major event in Philadelphia which engaged musicians without a union contract. The office of Local 77 contacted the AFM International

office for assistance in acquiring a signed agreement. The event took place on August 6, 2024 and there has yet to be an agreement filed, and the Harris campaign has not made contact with Local 77. A discussion was held on the upcoming AFL-CIO Labor Day parade. This year the parade route and festival location will be different than in years past, due to the ongoing construction at Penn's Landing. The festival will be held at the Sheet Metal Workers' Union headquarters, and the parade will travel down Washington Avenue, and onto 2nd street. Local 77 musicians will be performing in a marching band, and there will be an event band engaged to perform at the festival from 10am-2pm. S-T Antonacci reported that the musicians of the Arden Theatre have signed authorization cards, and following a card check by an independent mediator the Arden Theatre management is poised to give voluntary recognition to the bargaining unit. A discussion was held on the upcoming International Conference of Symphony and Opera Musicians conference which will be held in Portland, Oregon. EB Ansel reported on the upcoming Philadelphia Ballet gala, which is slated to take place in the Fall. EB Ansel reported that the Walnut Street Theatre has recently sent their counter proposal to Local 77. The negotiating committee and Local 77 officers will be reviewing their proposal and hope to schedule a follow-up meeting in the coming weeks. S-T Antonacci reported that the new Academy of Vocal Arts Collective Bargaining Agreement is undergoing ratification and is expected to pass with a super majority. S-T Antonacci reported that Jeremy Cohen is the new Director of Artistic Operations for the Chamber Orchestra of Philadelphia, and has replaced their former Director, Grace Wible. VP Goldberg reported on an ongoing issue with Opera Philadelphia related to the payment of canceled services. This issue, if gone unresolved, will go to arbitration as management is in violation of their Collective Bargaining Agreement by their refusal to pay. The orchestra committee is meeting with management currently, and plans to meet with the full orchestra body later this evening to discuss this issue and update their colleagues on the next steps moving forward. VP Goldberg reported on the recent Regional Orchestra Players' Association

(ROPA) conference which was held in San Francisco, CA. President Trainer attended the conference representing Local 77, as well as Opera Philadelphia ROPA delegate/board member and orchestra committee chair Brooke Beazley. VP Goldberg was reelected to her position on the ROPA Executive Board for another term. The conference was a success, and VP Goldberg reported that the vast representation of Local 77 officers and board members within nearly all player conferences in the AFM has not gone unnoticed. Executive session entered from 3:00pm–3:10pm. VP Goldberg reported that the Center City District is partnering with Local 77 and the Music Performance Trust Fund to host a music festival on every Sunday in September, beginning on September 8, 2024. A discussion was held on the importance of having cartage in the wage scale book that appropriately reflects compensation when a musician is required to bring a chair to the engagement. A motion was made and seconded to amend the cartage section of the wage scale to include a \$15 reimbursement whenever a musician is required to bring their own chair to the engagement. A motion was made and seconded to adjourn the meeting. Meeting adjourned at 3:15pm.

August 29, 2024

PRESENT: S-T Antonacci, VP Goldberg, and Executive Board members Robert Suttman and Nicole Jordan are present. **PROCEEDINGS:** Meeting called to order at 10:13am. The Executive Board reviewed the minutes from the previous meeting. A motion was made and seconded to approve the minutes as amended. No Name Pops (NNP) Executive Director Matthew Koveal is present at 10:23am. ED Koveal discussed a new partnership between the NNP organization and Artcinia. Artcinia was founded in 2020, and is dedicated to providing low cost, community informed programming in under-resourced neighborhoods throughout Philadelphia. NNP Director Koveal requested that the musicians of NNP be paid the public service rate in the Local 77 Wage Scale Book (WSB) for performances that are

presented by Artcinia. A discussion ensued regarding a clause in the section of the public service rates that state performances need to be free and open to the public. The performances for which this request is being submitted are ticketed events. Following a discussion, the Executive Board is willing to approve the request on the condition that NNP and Artcinia make it known that the performances are free and open to anyone wishing to attend. ED Koveal will speak with Artcinia representatives and report back to the Executive Board regarding this request. ED Koveal excused at 11:16am. S-T Antonacci reported on the profit and loss for July, as well as the balance sheet. An additional presentation was made on the FY '24 990's, Labor Management Reports (LM2), and the accompanying notes to those financial statements. A motion was made and seconded to approve the financial report. S-T Antonacci reported on the membership activity since the previous meeting. To date, Local 77 has 793 members. 778 are active and 15 are suspended. There has been one new member applicant since the previous meeting. A motion was made and seconded to approve the new member applicant. S-T Antonacci reported on the International Conference of Symphony and Opera Musicians (ICSOM), which was recently held in Portland, Oregon. Conference delegates voted and elected Local 77 EB member Nicole Jordan as the new President of ICSOM. EB Suttman reported on the Theatre Musicians Association (TMA) national conference, which was also held in Portland, Oregon. EB Suttman was re-elected as the TMA national Vice President for a second term. EB Suttman reported that there are two new TMA chapters who have recently been chartered in Cleveland and Toronto. VP Goldberg reported on the Philadelphia Ballet. The Ballet orchestra committee recently met with management regarding their upcoming gala. S-T Antonacci reported on the Walnut Street Theatre negotiations. A second negotiation is scheduled for Thursday, September 12, 2024. VP Goldberg reported on Opera Philadelphia. Opera Philadelphia recently

announced that they are selling their entire season for \$11 per ticket for any seat. During the first day of this announcement, they sold nearly 30% of their entire season by 4pm. VP Goldberg reported on the recent EDI work that has been done by the Opera company. EB Jordan reported on the Philadelphia Orchestra (POA). The POA musicians are currently on vacation following their recent performances in Saratoga. While in Saratoga, the POA musicians had three orchestra meetings and elected a new members' committee. Executive session entered from 12:14pm–1:30pm. S-T Antonacci reported that he attended an Executive Board meeting with the Boston Musicians' Association regarding the possibility of sharing the cost of building a new members-only section on the websites for both locals. This platform is called Usician, and is currently in use by two other AFM locals. S-T Antonacci will report back with additional information following additional research of the platform. A motion was made and seconded to adjourn the meeting. Meeting adjourned at 1:44pm.

September 13, 2024

PRESENT: President Trainer, S-T Antonacci, VP Goldberg, and Executive Board members Rebecca Ansel and Nicole Jordan are present. **PROCEEDINGS:** Meeting called to order at 9:37am. The Executive Board reviewed the minutes from the previous meeting. A motion was made and seconded to approve the minutes as amended. S-T Antonacci reported on the balance sheet as well as the profit and loss from August for Local 77. An additional financial report was presented for the second quarter reflecting expenses and revenue for the payroll service Playcheck77, Inc. A motion was made and seconded to approve the financial report. A discussion was held regarding the increased number of members benefiting from their ability to utilize the payroll service. S-T Antonacci reported that many members are putting both their single engagements as well as their local recordings under contract. He additionally stated that the ability for

members to use the liability insurance has made using the service even more appealing to members looking to put their single engagements under contract. EB Suttman present at 9:59am. S-T Antonacci reported on the membership activity since the previous meeting. To date, there are 792 members. 778 are in good standing and 14 are suspended. A discussion was held regarding the importance of Local 77 attending the annual PhilaPOSH awards ceremony, which is slated to be held on November 15, 2024 at AFSCME District Council 33 headquarters. S-T Antonacci reported that the 2025 annual Philadelphia Council AFL-CIO Leadership conference is scheduled to be held February 9-11, 2024 in Atlantic City. A discussion was held on the list of labor endorsed candidates from the Pennsylvania AFL-CIO, as well as Local 77 endorsing the Harris-Walz Presidential ticket. President Trainer reported that the PA AFL-CIO has offered to pay for the postage to mail letters of support to affiliate union members encouraging them to vote for the Harris-Walz ticket. The AFL-CIO has prepared two contrasting letters that are to be considered for distribution. The Executive Board reviewed the proposed letter templates and a motion was made and seconded to approve the mailing of the Harris-Walz support letter to Local 77 members. A discussion was held on the upcoming general membership meeting. The Fall meeting is scheduled to be held on Wednesday, October 23, 2024 at 4:30pm at the Local 77 office. Among the attendees will be AFM Assistant to the President and Chief of Staff Jonathan Ferrone and AFM International Representative for the Eastern Territory Alice Bish who will be in town for the Local 77 Operational Compliance Review. S-T Antonacci reported that he is in need of a new work laptop, and the Executive Board approved the purchase. EB Suttman reported that the musicians of the Arden Theatre will be receiving a survey in the coming weeks as they work to draft their first proposal. EB Suttman excused at 10:44am. Discussion ensued on the latest Walnut Street Theatre negotiation. President Trainer reported on

Opera Philadelphia. Opera Philadelphia is about to begin their run of The Listeners at the Academy of Music. VP Goldberg reported that the new Executive Director for Opera Philadelphia, Anthony Roth Constanzo will be performing all of the parts in a one-man show of the Marriage of Figaro in New York. VP Goldberg reported that the No Name Pops will be performing at Immaculata University in September, and she additionally reported that there are a multitude of engagements planned for January 2025. EB Jordan reported on the Philadelphia Orchestra (POA). The POA are wrapping up their fourth week of vacation and are preparing for their opening night concert on Thursday, September 26, 2024 at 7pm. EB Jordan additionally reported that the POA EDI committee is working on the implementation of a new training for POA musicians in partnership with the Rape Abuse & Incest National Network (RAINN). Executive session entered from 11:34am-11:40am. S-T Antonacci reported that the Center City District has partnered with Local 77 and the Music Performance Trust Fund (MPTF) to present three performances weekly on Sundays for a new event called 'Open Streets' which is taking place outside on Walnut Street between 15th and 18th street during the month of September. President Trainer reported that there is a new music venue opening on 15th street, directly behind the office of Local 77. A motion was made and seconded to adjourn the meeting. Meeting adjourned at 11:53am.

September 26, 2024

PRESENT: President Trainer, S-T Antonacci, VP Goldberg, and Executive Board members Rebecca Ansel and Robert Suttman are present. PROCEEDINGS: Meeting called to order at 12:32pm. The Executive Board reviewed the minutes from the previous meeting. A motion was made and seconded to approve the minutes as amended. S-T Antonacci reported on the upcoming PhilaPOSH awards night. VP Goldberg and EB Ansel will be in attendance. A discussion

was held on Local 77 purchasing an advertisement in the awards night booklet. VP Goldberg suggested that in lieu of purchasing an advertisement, Local 77 should consider sponsoring a musician to perform live at the event. A discussion was held on the topic. S-T Antonacci will reach out to PhilaPOSH representatives regarding the live entertainment and will report back at the next meeting. S-T Antonacci reported that the Local 77 Harris-Walz endorsement letters have hit mailboxes, and in the coming days an electronic announcement will be sent out as well. S-T Antonacci reported that he has migrated Local 77 accounting software from Quickbooks Pro (desktop edition) to Quickbooks Online. The previous desktop version of Quickbooks is no longer supported. S-T Antonacci reported that he is in discussions with a potential new website developer. Following a conversation with the new developer, S-T Antonacci will schedule a meeting with the Executive Board and the developer to go over specifics, including pricing. S-T Antonacci reported on the membership activity. To date, there are 794 members. 780 are in good standing and 14 are suspended. A motion was made and seconded to approve for new member applicants. S-T Antonacci reported that the Fall newsletter is set to go to print in October. EB Suttman reported on the Theatre Musicians' Association (TMA). The musicians who have recently organized at the Arden theatre are going to be receiving their first bargaining survey, as they work to build their first proposal. EB Ansel reported on the Philadelphia Ballet. The Ballet is preparing to hold two auditions, and have received only 24 applications for oboe, and 18 for cello. EB Ansel reported that the Ballet management is hoping that more applications come in before the deadline passes. S-T Antonacci reported on the latest negotiations with management at the Walnut Street Theatre. EB Ansel reported on Opera Philadelphia. Opera Philadelphia had their opening gala and world premiere of The Listeners, which premiered to a sold out audience. S-T Antonacci reported

that he and President Trainer attended the Philadelphia Orchestra (POA) full orchestra meeting, where they reviewed the itinerary for their upcoming China tour in the Fall. The POA will be hosting their opening performance and gala as well, where they will be presenting a world premiere performance of the orchestral suite to the Terence Blanchard opera Fire Shut Up in My Bones. A discussion was held on scheduling the October Executive Board meeting. VP Goldberg reported on a recent meeting that was held with her, President Trainer and representatives from IATSE Local 8 regarding a new performance venue opening in center city. S-T Antonacci reported on a phone call that came into the office regarding Local 77 musicians who have been engaged for performances at the Suzanne Roberts Theatre for substandard wages. A discussion was held on the most appropriate method to address the issue. VP Goldberg additionally reported on the Music Performance Trust Fund (MPTF). VP Goldberg reported that Local 77 has nearly exhausted its allotment of Music Performance Trust Fund (MPTF) funding for this fiscal year. VP Goldberg has submitted a request for additional funding. A discussion was held on how to extend our allotment as much as possible. President Trainer reported on a political breakfast that Local 77 has been invited to in support of State Representative Elizabeth Fiedler. A discussion ensued on the importance of the attendance of Local 77 representatives at these engagements. A motion was made and seconded to adjourn the meeting. Meeting adjourned at 1:54pm.

Instrument For Sale

For Sale - Holton H179 Double Horn S.N.629722. Purchased Oct 2022 from a notable dealer and listed as "Mint" condition. Asking \$4,000 firm. More pics can be provided upon request. Contact Steve (610) 393-6118.



*The Philadelphia Musicians' Union, Local 77 AFM
is a proud member of the Philadelphia Council AFL-CIO*



VOTE



NOVEMBER 5, 2024