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Hon. Timothy S. Hillman
Election Supervisor

**ELECTION SUPERVISOR’S SUMMARY REPORT NO. 1 TO THE IBT 2025-2026 IBT
INTERNATIONAL UNION OFFICER AND DELEGATE ELECTION**

The December 6, 2024 Election Agreement Between the International Brotherhood of Teamsters (“IBT”) and the Office of the Election Supervisor (“OES”) (The “2026 Election Agreement”) provides that “[t]he 2026 Election Supervisor shall submit reports to the IBT which, in turn, has the obligation to share these reports with the IBT membership.” 2026 Election Agreement, ¶ 4. Each month during the election cycle, the Office of the Election Supervisor (“OES”) provides to the IBT an accountant’s compilation of the OES financial statements, including a chart that shows the OES actual and budgeted expense. This report provides additional narrative context for the monthly financial compilations and summarizes activities conducted from the commencement of operations through September 30, 2025.

I. 2026 Election Agreement

The Final Agreement and Order entered on February 17, 2015, by the United States District Court for the Southern District of New York Court (“Final Order”) in *United States v. International Brotherhood of Teamsters*, Case No., 88-cv-4486 (S.D.N.Y. 1988), sets out the broad framework for conducting the 2026 IBT International Officer Election. To carry out the election, the IBT entered into the 2026 Election Agreement with the OES. The 2026 Election Agreement provides that the 2026 IBT International Officer Election shall be conducted “pursuant to rules and procedures designed to ensure a fair, free, and democratic election,” and be supervised by individuals selected by the IBT but meeting qualifications spelled out in the Final Order. *2026 Election Agreement*, p. 1 (citing *Final Order*).

The 2026 Election Agreement memorializes the IBT’s appointment of the Honorable Timothy S. Hillman (Ret.), as Election Supervisor, noting his distinguished almost 20 years of service on the federal bench in Massachusetts, first as a United States Magistrate Judge, and then as a United States District Judge. Prior to his appointment as a Magistrate Judge, Judge Hillman served as a state court judge for 15 years. He has presided over matters involving all aspects of law enforcement investigations and complex matters involving federal labor law. Judge Hillman began his legal career as an assistant district attorney in the Worcester County District Attorney's Office in 1975 before going into private practice for over 25 years. While in

private practice, he represented clients in a variety of civil and criminal matters with a concentration on representing municipalities. He also served as city solicitor for Fitchburg and the City of Gardner.

The 2026 Election Agreement also memorializes the IBT's appointment of the Barbara S. Jones as Election Appeals Master, noting her service in that position during the last election cycle, her distinguished 17-year service as a United States District Judge for the Southern District of New York, her previous appointment as Independent Review Officer for the IBT under the Final Order, and other relevant government service prior to serving as Election Appeals Master.

The 2026 Election Agreement carries forward precedents and practices from the previous IBT International officer elections and essentially provides for the OES to supervise the 2026 IBT International Officer Election as it has previously. The OES proposed a budget for its supervision of the 2026 IBT International Officer Election. The IBT accepted, and is funding, that budget.

II. Preparation of the Rules for the 2025-2026 IBT International Union Delegate and Officer Election (the "2026 Election Rules")

The Final Agreement provides that "the GEB shall promulgate Election Rules...which are substantially the same as those which governed the previous IBT elections but may make non-material changes as necessary to tailor the rules to a new election cycle." Final Agreement, ¶ 20. The 2026 Election Rules were issued following that framework. On April 9, 2025, OES announced a set of proposed election rules for general comment. Notice of the proposed rules, and an invitation to submit comments was published on the OES website and the IBT's website and was mailed to rank-and-file members in the *Teamster* magazine to be received April 21, 2025, followed shortly thereafter by a direct mailing to members in Canada. The proposed rules included non-material changes permitted by the Final Order in *United States v. United States v. IBT*, No. 88-cv-4486 (LAP) (S.D.N.Y. 1988) to tailor the election rules used in the 2020-2021 election cycle to the current one.¹ In addition, the proposed rules included several material changes adopted by the Election Supervisor. Each material change is fully consistent with federal law, the IBT Constitution, and the Final Order. The proposed rules and a memorandum summarizing the proposed changes for the current election cycle were available for viewing and download at the OES website.

We received comments in response to the proposed rules from Maralin Falik, CEO of Global Election Services, and Robert Bonsall, an attorney representing IBT Local 2010 and other Joint Council 7 Locals.² Ms. Falik opposed permitting the placement of signage or banners on employer property for campaigning out of concern that it may give rise to discord and vandalism on employer property. After consideration of the comment, OES modified the

¹ The Final Order requires the International Union Delegate and Officer Election to be conducted using Rules that are "substantially the same as those which governed the previous IBT elections."

² Mr. Bonsall's correspondence requests clarification of Article II, Section 7(d) of the Proposed Election Rules set forth in prior elections and does not comment on any of the proposed material or non-material changes set forth in the Proposed Rules. However, because of the importance of ensuring that the Election Rules are clear and interpreted correctly, we provided a response.

2026 Election Rules to clarify that the permissible use of signs or banners on employer fences while campaigning is limited to those employer fences located next to or in the immediate area where the campaigning activity occurs.

Mr. Bonsall asked for clarification regarding the interpretation of Article II, Section 7(d), which states in relevant part, “The Notice of Election shall be included in the mail ballot package which shall be mailed no later than twenty-four (24) days prior to the deadline for return of ballots.” We confirmed that this means that the Notice of Election including the ballot must be mailed at least 24 days before the deadline for return of the ballots. The election rules governing IBT International Union Delegate and Officer Elections since at least 1991, have used this language, which has repeatedly and consistently interpreted as set forth above. On September 10, 2025, the OES published its response to the comments on www.ibtvote.org.

On September 10, 2025, the 2026 Election Rules were adopted by the General Executive Board of the International Brotherhood of Teamsters (“GEB”). Copies of the 2026 Election Rules in English, Spanish and French are available at www.ibtvote.org.

III. Office Organization and Staff

The 2026 Election Agreement incorporates the Final Order’s requirements that the IBT “pay all costs and expense of, and provide suitable space outside the premises of the IBT” for the OES. *2026 Election Agreement*, ¶ 8. The OES opened its headquarters office at 1750 K Street, N.W., Suite 200, Washington, D.C., 20006.

Senior Project Supervisors William Broberg and Paul Dever regularly operate from the headquarters office. Mr. Broberg and Mr. Dever have held senior positions in the OES for several International Officer election cycles and have also conducted elections for other unions and government authorities. A third Senior Project Supervisor Dennis Sarsany, who has participated in the IBT Officer Election process since 1991, has performed his role primarily remotely. Teresa Flick serves as OES Project Accountant and regularly works from the headquarters office. She handles the same general areas for which she had responsibility in prior election cycles, which include managing the OES budget and accounts payable, and overseeing the filing of Campaign Contribution and Expenditure Reports. Before serving as the OES Project Accountant, Ms. Flick served for several election cycles as the independent reviewer and compiler of OES financial reports provided to the IBT and the government. Kelly Hogan, an attorney based in Boston, serves as Chief of Election Protests and Investigations responsible for overseeing all aspects of the protest process including investigations, decisions, appeals and compliance with any remedial order issued to ensure compliance with the 2026 Election Rules to promote a fair, honest, open and informed election cycle. Ms. Hogan’s legal practice includes defending and advising clients in complex internal and governmental investigations and enforcement actions. Her investigative experience includes representing a large international labor union and alleged violations of federal, state and labor law. She also regularly represents clients in cases involving discrimination, retaliation, and other workplace-related claims before administrative agencies and in state and federal courts. Ms. Hogan was an Assistant District Attorney in Suffolk County where she investigated, evaluated evidence, and prosecuted a wide range of criminal offenses.

Nine Regional Directors carry out OES work throughout the United States of America and Canada. Eight of the Regional Directors have previously worked for OES in the same capacity and have extensive experience with the election rules and procedures used, and with supervising the delegate nominations and election tasks in IBT local unions in their respective geographic regions. The last Regional Director has served as an Adjunct Regional Director for the OES in prior elections and fully understands the election procedures. Contact information for the OES and each of the Regional Directors is posted on www.ibtvote.org. The volume of work for the OES in coordinating local union delegate elections and dealing with campaigns has been comparable to prior elections.

IV. OES Information Technology

a. CCERS

OES has required on-line electronic filing for candidate financial reporting (the Campaign Contribution and Expense Reporting System or “CCERS”) since the 2006 International Officer Election. During the 2021 IBT International Officer Election cycle, the OES worked with its software contractor to implement significant upgrades and improvements to CCERS. The changes to the software most visible to the campaign-users simplified the data entry process generally and created a new tool to allow bulk entry of data, saving campaigns significant time and effort in their compliance reporting work. Other aspects of the software, not visible to users, were also improved. OES undertook this project with its software developer after searching for an “off the shelf” product that could perform the functions and learning that customization of available products would cost many times more than upgrading the existing system and discussing options with the IBT. For the 2026 IBT International Officer Election Cycle, OES is using the same system it used in the 2021 election cycle but has continued to add enhancements to aid campaigns and users.

b. LUEP

Local union delegate elections are the first step in the 2026 IBT International Officer Election cycle, and the 2026 Election Rules require each local to create a Local Union Election Plan (“LUEP”) for conducting nominations and any contested election. The LUEP for each local union identifies: i) the steps to conduct the election and the schedule for each step to occur; ii) the persons responsible for conducting the election; iii) the ballot security procedures to be used; and iv) the procedures to obtain maximum member enfranchisement.

A software program was created in 2011 for local unions to create and submit the election plan using an on-line template, which was significantly updated and re-styled by OES’s software developer to improve the organization and readability of the local election plans in the 2021 election cycle. Once the plan is proposed, an OES Regional Director reviews the plan and consults with the local to make any modifications as appropriate or necessary to comply with the 2026 Election Rules. The Election Supervisor reviews, and gives final approval to, each LUEP.

OES has received LUEPs from all 379 local unions³ responsible for electing delegates to the International Convention. As of October 24, 2020, OES has approved 268 of the submitted plans, which is about 80%. We expect to complete the approval process within the following month.

c. www.ibtvote.org

The OES website, initiated in 2001, remains the hub for information about the election. The website was refreshed in 2016, and no significant changes have been made to the style or operation of the site from the previous election cycle. Protest decisions from pre-internet election cycles, going back to the 1991 election cycle, that were available were scanned and are available on the website.

V. Delegate Elections

The great majority of nominations meetings and delegate elections will take place between January 5, 2026 and April 26, 2026. Some nominations, however, have occurred under special rules that allow for the summer or fall 2020 elections. Specifically, 3 local unions representing workers in seasonal agricultural industries and 28 local unions that opted to pair the delegate election with a regularly scheduled officer election, have scheduled summer or fall nominations meetings. As of November 11, 2025, 29 meetings have been conducted resulting in 26 uncontested delegate nominations and 3 contested elections.

VI. Campaign Finance Reporting and Auditing

The 2026 Election Rules require candidates for IBT International Office, their slates, and independent committees to file reports disclosing funds received and paid out. These reports, known as Campaign Contribution and Expenditure Reports (“CCERs”), have been part of supervised IBT elections since 1991. OES analyzes the CCERs to see that candidates, slates and independent committees are complying with limitations on funding sources, fund segregation, and expenditures. OES has engaged GRF, CPAs and Advisors (a Bethesda, Maryland accounting firm), to survey the reporting parties’ compliance with the campaign finance rules and report to OES. Teresa Flick, at OES headquarters, will also be involved in monitoring campaign finance reporting compliance. OES aims to have the reporting parties file timely, including having them perform regular and prompt bank reconciliations as the election progresses.

The deadline for the first reporting period (through June 30, 2025) was July 15, 2025, and the second reporting period (July 1, 2025 through September 30, 2025) was October 15, 2025. The deadline for the next reporting period (October 1, 2025 through January 31, 2026) is February 15, 2026.

The 37 known candidates for International Office as of the end of the first and second filing period filed the required reports.

³ “Local union” refers to local unions, system federations, and general committees of adjustment – the three types of subordinate bodies that elect delegates to the IBT International Convention.

VII. Protests

Any member, local union or other subordinate body of the IBT, or the IBT itself may file protests alleging noncompliance with the 2026 Election Rules. The protest process is supervised by Kelly Hogan, with investigations assigned to Regional Directors and adjuncts in the field or staff at OES headquarters. Protests are resolved with written decisions and any party aggrieved by the result of a protest may file an appeal with the Election Appeals Master, the Honorable Barbara S. Jones (Ret.). Issued decisions and appeals are posted and available at www.ibtvote.org.

As of December 11, 2025, OES has received 40 protests and disposed of 32 of these protests in 20 written decisions. Five decisions have been appealed to the Election Appeals Master. Violations of the 2026 Election Rules have been found and remedies ordered in eight decisions; one protest was withdrawn; and the remaining protests were denied.

VIII. Budget and Expenses

OES proposed to the IBT a budget of \$ \$14,171,980.00, based on certain assumptions about the level of election activity. Actual activity is compared to the budget and reported to the IBT each month. OES has expended \$ \$1,539,947.95 from October 1, 2024 through September 30, 2025. Obviously, events that relate to major categories of expense (supervision of delegate elections, nomination of International officers at the International Convention, union-wide balloting with attendant staffing, printing and mailing costs, CCERs auditing, expected protest investigations, among other things) have yet to unfold.

The original budget estimate may be sufficient to cover the complete project but changing circumstances and actual experience during the election cycle may result in modifications to the budget. OES will continue to provide its monthly expense information to the IBT, and keep the Union informed about the activities necessary to complete this election in a manner that is fair, open, and honest for all members of the IBT.

Dated: December 11, 2025

Respectfully submitted,

A handwritten signature in blue ink, appearing to read "T. Hillman", is written over a horizontal line.

Hon. Timothy S. Hillman (Ret.)
Election Supervisor