

# **ANNUAL REPORT**

## **of the Executive Director-Treasurer to the Annual Meeting of Delegates**

In 2019 the MTA adopted five strategic priorities as a blueprint to grow collective power. These priorities continue to guide and inform the planning and work of the MTA. Over the last year, MTA members and locals – supported by MTA staff – have continued to advance the Blueprint.

### **BLUEPRINT PRIORITIES**

#### **1. Connect members to the life of the union.**

This year, thousands of members have been engaged in their locals and the MTA through:

- Membership drives.
- Contract campaigns.
- Creating 1:10 communication structures in their schools and campuses.
- Professional development workshops provided by MTA.
- Engagement in social media with educators and coalitions across the state.
- Engagement in affinity groups and peer groups, especially for historically marginalized groups such as educators of color and Education Support Professionals.

#### **2. Cultivate and support leadership at all levels of the union.**

Thousands of members have participated in seminars and conferences such as:

- Summer Conference at UMass Amherst.
- Fall Bargaining Summit.
- Winter Union Skills Conference.
- ESP Conference.
- Regional and statewide presidents' meetings.
- Expanded mentorship programs.

### **3. Maximize our bargaining power.**

- Democratized bargaining, including establishing a contract action team and strong communication structure, is fast becoming the norm for locals across the state.
- Transformative goals – such as an ESP living wage and paid family leave – are being established and advanced in negotiations.
- Tools and resources developed by the MTA bargaining campaign strategy team and organizers are being widely utilized – tools such as the Municipal Finance database, Contracts database, Salary database, etc.

### **4. Advance policy solutions and campaigns.**

- Members across the state led the development of the MCAS ballot initiative and gathered more signatures than any other initiative this cycle.
- Locals are engaged in Proposition 2 1/2 overrides and local elections.
- Policy, regulatory and statutory campaigns are constantly in motion on issues including RetirementPlus, expanding Chapter 70 funding, expanding access to affordable health insurance for adjunct faculty and other members without employer-based coverage, and advocacy on state and local budgets.

### **5. Lead on economic, social and racial justice.**

- The ESP and Adjunct Bill of Rights and Living Wage campaigns are being advanced across the state by locals, committees and leaders with staff support.
- Racial justice initiatives such as the Ethnic Minority Affairs Committee (EMAC), the Anti-Racism Task Force and the ALANA educator network have all been supported in their work.
- Racial and social justice workshops, dialog sessions and conferences have been prepared and presented throughout the year by the Training and Professional Learning division, Board leaders, staff and others.
- The LGBTQ+ Committee has developed workshops and support networks for LGBTQ+ educators and allies.

MTA staff is organized into 10 Divisions. Here are brief descriptions and reports covering each.

## **FIELD & ORGANIZING DIVISION**

This division includes all field staff working out of the five regional offices as well as the higher ed team. The field rep-organizers and regional organizers provide direct, day-to-day support for locals as well as for contract campaigns, issue campaigns, advocacy and organizing training, etc. Other specialized staff in this division support locals through research, organizing, membership drives, and more. The creation of an organizing team within this division and the addition of four organizers has provided more opportunity for developing strong contract campaigns with more locals.

Just after the 2023 Annual Meeting of Delegates, the **Educational Association of Worcester** (MTA's largest preK-12 local) won its strongest contract ever after organizing an escalating campaign – with a large CAT team and silent bargaining reps – and culminating in a rally of over 1,000 members at City Hall. The contract gains included completely revising the paraprofessionals' wage scale with the former top step becoming the new starting step, and Unit A increases averaging 4 percent per year.

The 2,000-member **Newton Teachers Association** strike was one of the largest and longest educator strikes (15 days, including 11 school days) in state history. The negotiation team represented all five of its bargaining units at one table and used democratized bargaining with rotating groups of 40 silent reps at negotiations each day for three-hour shifts. NTA won major victories including: a contractual commitment to ensure that students have increased access to mental health supports, such as social workers; a parental leave policy that removes discriminatory language and guarantees up to 60 paid days; a 30 percent-plus increase for ESPs that creates a salary range by the end of the contract of \$36,000-\$70,000; and a 12 percent salary increase over four years with meaningful improvements to steps for all members.

The **Andover Education Association** went on strike in November. Its strike lasted five days (including three school days). The AEA combined its teacher and ESP teams into one unified team and used democratized bargaining. The AEA contract settlement included: a living wage for ESPs with a starting salary of \$40,000 by the end of the contract; ESP raises that range from 37.5 percent to 59.5 percent over the four-year deal; increased elementary prep time; 12 weeks of paid parental leave (eight weeks paid by the employer, four weeks through sick leave); 15 sick days for family illness, 60 sick days for family illness under FMLA; a reduction in staff meeting time; and 15.5 percent across the board, with teachers at the top step seeing an increase of 17 percent to 20 percent over the four-year deal.

Many locals engaged in escalating campaigns to win breakthrough contracts. Some examples include **Ashburnham Westminster** ESPs, who won an increase in annual pay of 10 to 35 percent over the three-year contract. In **Cambridge**, Unit A members won 17.25 percent salary increases over three years, for 7.43 percent of additional time. In **Wakefield**, educators negotiated 14 percent over four years (3%, 3.5%, 4%, 3.5%) and won increases in family illness and parental leave. In **Avon**, members won close to 12 percent salary increases over three years, modern parental leave language, reduced administrative meetings and a host of other improvements. In **Weymouth**, Unit C BCBA members won a contract that includes just-cause protection for the first time, health and safety language, a matched Unit A salary and longevity scale, supplemental pay for home visits and compensation for Registered Behavior Technician (RBT) supervision. In **Randolph**, educators through an escalating campaign using

silent bargaining reps and an effective contract action team secured 11.25 percent over three years, along with four weeks of paid parental leave not out of sick time, meaningful class size and caseload language, and arbitrable health and safety language. In **Stoughton**, members won a vastly increased starting and terminal salary with a shorter salary schedule that drops the bottom two steps and adds a new top step that is 3 percent higher, as well as eight weeks of paid parental leave not out of sick time. The **Manchester-Essex Teaching Assistants Union** won a first-ever contract which includes just cause language and a wage increase bringing its members' compensation closer to a livable wage.

Democratized negotiations are underway with silent reps in **Springfield, Fitchburg, Framingham, Barnstable, Douglas, Fall River, Hingham, Beverly, Danvers and Gloucester.**

In **Higher Education** locals, thousands of higher ed members forced the Legislature back into session to fund the one-year contracts of over 60,000 public employees that went into effect on July 1, 2023. The Higher Ed Coalition won wage parameters of more than 20 percent over four years.

Field staff and local leaders and members also gathered record numbers of signatures for the MCAS **ballot initiative** campaign, worked with the new Legislation, Policy, and Political Action Division and MTA members to organize turnout for State House hearings on the **Cherish and Thrive acts.**

We are also organizing **new units.** Educators at the **Lower Pioneer Valley Educational Collaborative** won a petition for written majority authority and welcomed a new unit of Education Support Professionals. The **Dover-Sherborn Education Association** organized a new unit of 80 Educational Assistants, who were previously in an independent association.

### **THE SAFE SCHOOLS FOR ALL CAMPAIGN**

Member-leaders and staff – especially in southeastern and western Massachusetts – organized Safe Schools for All forums and developed a report with recommendations, “Classrooms Solutions to the Mental Health Crisis in Our Schools.” On Jan. 11, more than 180 MTA members from across the state presented their concerns and recommendations to Secretary of Education Patrick Tutwiler. MTA staff will continue to work with member-leaders to create resources for each local on how to deal with student dysregulation and workplace violence at the local level. The plan is to hold a statewide summit to address this crisis.

### **LEGISLATION, POLICY, AND POLITICAL ACTION DIVISION**

This division was newly formed this year by merging the former Government Relations, Center for Education Policy and Practice and Grassroots divisions into one combined group. There are still three teams in the new division, but they work much closer and more cohesively in the new configuration. In addition to the core functions of policy development and analysis, grassroots political action (overrides, local elections, and in-district meetings) and lobbying, the division focused on four main areas of work this year:

Replacing the MCAS graduation requirement with a more accurate measure. The division drafted the Nov. 5 ballot question, working with legal counsel and state authorities to get the initiative certified. It led the successful effort to collect and turn in over 130,000 signatures from registered voters in coordination with the field and the rest of the MTA. It coordinated legislative hearings and direct lobbying of key decision-makers. LPPA also produced analysis and reports supporting the ballot initiative and conducted in-district meetings and “Thank

you” campaigns for supportive legislators. It ran extensive phone banks for members to contact legislators and is building a volunteer base for the campaign.

Winning high-quality, debt-free public higher education for all. The division implemented a comprehensive campaign including coalition building, direct lobbying, in-district meetings, local resolutions, numerous public events and extensive earned and paid media. It also produced an analysis on how public college graduates are more likely to stay in Massachusetts than are private college grads. The division developed a salary equity analysis that showed higher education faculty and staff are paid much less here than in nearby states when accounting for cost of living. This work, along with research on the effects of inflation and strong coalition work led by our higher education team, contributed to salary parameters that will create salary increases of more than 20.5 percent over four years.

Winning funding for public education in preK through higher ed. Through coordinated policy analysis, grassroots and inside lobbying, there were many state budget wins including: a Fiscal Year 2024 Chapter 70 funding increase of \$600 million over FY 2023; \$150 million more in financial aid for students attending public colleges, with a commitment to win free community college for all, the first step toward a debt-free public higher education system; access for many adjunct faculty and staff, and ESP members, to affordable health insurance through the state’s ConnectorCare program; in-state tuition rates for all state residents, including immigrants; \$100 million to create more environmentally friendly school buildings; \$125 million for higher education capital funding; \$100 million to expand financial aid programs for in-state students attending state universities through MASSGrant Plus, bringing the total proposal for this program to \$275 million; \$30 million for Student Support Services to ensure students in the state have success on the post-secondary level through wraparound supports, bringing the total program investment to \$44 million.

Diversify the Educator Workforce and Create Culturally Sustaining Schools. The division conducted analysis and lobbying to advance legislation that will create alternatives to the communications and literacy MTEL that has served as a discriminatory barrier to the teaching profession. It analyzed DESE’s new culturally responsive education teacher evaluation rubric, addressing the importance of a diverse workforce. The division researched, developed and co-led presentations on Community Schools. It ensures that the wisdom and knowledge of front-line educators are brought to bear on policy and research work from MCAS to literacy to licensure, and more.

## **LEGAL DIVISION**

The Legal Division provides stellar legal services and representation to individual members and local union affiliates on nearly 1,200 cases annually in a wide array of labor and employment matters ranging from DLR/CERB proceedings to contract disputes to disciplinary proceedings to 51A investigations, as well as other contract disputes and much more. The Legal Division provides counsel to locals involved in strike investigations, appeals and court proceedings related to strikes. Additionally, staff counsel continue to assist locals during contract negotiations, public records requests, local incorporation, etc.

Beginning in 2017, the division has advanced the cases of hundreds of members who transferred to the Massachusetts Teachers’ Retirement System (MTRS) from another Massachusetts public contributory retirement system, and who were deprived of a meaningful RetirementPlus (R+) election opportunity. After years of litigation and lobbying efforts by Government Relations staff, the MTA was successful in changing the law. Last spring, eligible

members who transferred to the MTRS after 2001 were provided with a new, one-time R+ election opportunity. Various divisions at the MTA focused on outreach and publicity, facilitating thousands who took advantage of this opportunity, enabling them to retire three to five years earlier than under the standard superannuation formula. Now, pursuant to the MTRS revised regulations, new transferees must be provided with notice of the R+ election opportunity.

There has been an increase in requests for assistance on wage claims for summer work, which is typically not covered under local contracts and therefore not covered under the Legal Services Policy. However, if the filing of wage claims is part of an organizing effort to cover summer work, an exception can be made on coverage. An example of this was when the Brookline public schools failed to pay timely wages to summer workers. A recent settlement has secured nearly \$500,000 in late pay damages for members who worked over the summer. Similar wage claims are being litigated in Lexington and Malden involving late payment of wages from summer employment. Another recurring potential Wage Act issue involves district recoupment of over or underpayment of salaries and benefit withdrawals. Districts are required to bargain with locals before attempting to recoup such payments, and our locals have often been able to negotiate more reasonable terms for repayment for members which do not run afoul of the law.

The Legal Division developed a guide to assist local unions interested in influencing and impacting electoral politics, including school committee and mayoral elections, and to better understand the rules and obligations under campaign finance laws. Local organizing has been expanded to engage the MTA's Independent Expenditure PAC (IEPAC) to support candidates friendly to labor and to get out the vote among members and the local community. Released in October 2023, the guide will be updated annually to reflect any changes in the law.

The division is shifting billing and case management systems to a new platform. The change will be implemented over time but will lead to a more efficient and user-friendly system. The division also continues to support locals through providing workshops and resources on topics ranging from the perils and opportunities of social media, curriculum and book bans, protecting academic freedom, protecting anti-racist curricula, and more.

## **COMMUNICATIONS DIVISION**

The Communications Division provides support for locals and MTA leadership, and develops and implements public relations strategies and campaigns, and more. Over the last year, communications staff have helped locals frame and drive public narratives around their **contract campaigns**. In Andover and Newton, training and support were provided for members to carry the public message of those campaigns. A great example was when CBS ran a moving story at the end of the Andover campaign featuring a member who gave birth to twins the day after the contract settlement – perfect timing since the AEA had just won paid parental leave. Communications staff also develop relationships with reporters and editors across the state in order to ensure that MTA and local messages and stories are covered.

In fall 2023, Comms launched a rebranded **MTA Today** magazine with a more contemporary look for both the print and digital magazines. We will continue to improve the updated digital platform with standalone web stories and interactive videos. Staff and members have praised the new magazine, and in fall 2024 we will poll members about it. At the same time as we launched a rebranded magazine, we also updated our email list so that the digital magazine

reached significantly more members' inboxes than ever before. The fall 2023 digital issue reached 102,885 members versus the 31,142 who received the Fall 2022 issue.

Communications staff have increased member engagement by cultivating and improving an emailed **newsletter** from Max Page and Deb McCarthy that goes out every Tuesday. Open rates climbed from 12 to 15 percent to an average of around 19 percent by the end of 2023. The division plans to further improve this newsletter by creating a new "actions map," which will display upcoming local actions in a user-friendly way.

Through the **MCAS ballot campaign**, communications is expanding its repertoire of media spokespeople, not only among members but also among key parent allies. For example, with the help of Grassroots, communications staff connected with a small group of South Shore parents who collected signatures for the ballot out of a juice shop in Norwell that one of them owned. Since that time, communications has helped develop one of these parents into a powerful spokesperson. Communications has also been instrumental in helping other parent activists sharpen their spokesperson skills. Lastly, staff are currently meeting with counterparts in other unions and NEA affiliates to compare and share practices, tools and resources with the goal of continuing to improve the division.

## **DIVISION OF GOVERNANCE AND ADMINISTRATION**

The division manages all Governance-related meetings and events, including the Annual Meeting of Delegates, Executive Committee and Board of Directors' meetings, All Presidents' and Regional Presidents' meetings, among others. The division also coordinates and manages the Massachusetts delegation's attendance at the NEA Representative Assembly. It provides day-to-day assistance to MTA officers, the Executive Committee, the Board, member committees and local association leaders. Key activities this year have included:

- Hosting the MTA Annual Meeting of Delegates as a hybrid meeting for the second year and for the first time in Springfield.
- Forming a new Governance Division team and integrating systems-approach to work.
- Bringing transparency to operations of the division.
- Providing administrative support in the appointment of MTA committees and serving as staff liaison to several committees and task forces.
- Preparing budget proposals for the division's operations and for MTA committees.
- Dedicating support staff to MTA leadership for work on all MTA campaigns.

## **TRAINING & PROFESSIONAL LEARNING DIVISION**

The TPL Division plans and administers major events and conferences as well as professional development, topical forums, trainings and workshops, and provides leadership for the in-development Community Schools campaign.

TPL delivered 39 professional development courses between January 2023 and April 2024. Some of the courses were delivered synchronously, some asynchronously, and some in person. A total of 1,934 members participated in professional development programming. TPL, in partnership with CEPP, also delivered 10 Licensure Workshops for 3,384 MTA members. The Next Generation Leadership Program also was offered at several conferences.

TPL worked with Finance & Accounting and Field & Organizing to provide online training for local leaders, treasurers and membership chairs, which was so popular that the division offered the classes again in the winter. Additionally, a class tailored to Higher Ed treasurers

was offered for the first time. At the Winter Union Skills Conference, TPL staff offered traditional treasurer and membership chair training, a three-hour workshop on encouraging members to join the union and a standalone NEA 360 session. A training on parliamentary procedure was held in the Southeast Regional Office on Feb. 5, serving nearly 20 locals.

The division planned and executed major events and conferences including: Bargaining Summit, Higher Ed Conference, Winter Union Skills Conference, Early Career Educators Conference, Men of Education Gathering, Aspiring Educators Conference, Student Education Association of Massachusetts Conference, Ethnic Minority Affairs Conference, the Retired Members Committee Speakers Series, Anti-Racism Task Force Forum Series, Summer Conference, Juneteenth, and more.

## **FINANCE AND ACCOUNTING DIVISION**

The F&A division carries out all the routine and extraordinary financial, accounting, purchasing, payroll and membership functions for the MTA. Though much of this work is behind the scenes it is crucial for the success and sustainability of all of MTA's programs.

The division provided **training and membership** support for locals including: implementing eBilling and guiding treasurers and member-chairs to eBilling for easier access to online rosters; running nine online training sessions for local officers on membership management topics; developing tools for faster report creation; working with locals on roster reconciliation; and processing over 7,000 files sent in from locals in the fall and winter. The division successfully completed **audits and reports** with increasing regulatory complexity. Some of the complexities include new accounting and reporting requirements related to portions of MTA's investment portfolio, new lease accounting and disclosure requirements, and more. Additionally, the F&A division ensures timely and accurate filing of OCPF and grant reports.

The division also successfully **onboarded** two key positions over the last year - the CFO and Membership Manager. Other positions continue to evolve and two more vacancies should be filled soon.

## **INFORMATION TECHNOLOGY SERVICES AND PRINTING & MAILING DIVISION**

The two departments within this division provide printing and mailing services for locals and the MTA and provide IT support for staff and MTA technical infrastructure.

The **IT department** continuously monitors and supports tech needs for staff and members using MTA offices. IT implements, supports and maintains all major computer applications, as well as nearly 200 laptop and desktop computers, printers, servers and cellular telephone systems. IT further develops solutions for technical challenges that the various divisions each face in carrying out their work. A significant accomplishment this year - with substantial savings for MTA - was migrating all the phone systems to a Microsoft-based system that works wherever one is working, including on mobile devices. Additionally, when a longtime staff member retired, the position was reviewed along with the needs of the MTA and the position was recreated into an IT Trainer position, which will take on IT functions as well as provide ongoing training for staff on programs and applications.

The **Printing and Mailing department** fulfilled 992 job requests during calendar year 2023 to meet print requests from all MTA Divisions, locals, coalition partners and other outside clients. Of these requests, 304 were for various local associations, involving the printing of materials



such as contracts, fliers, newsletters and postcards. The department continues to see an uptick in the use of the wide-format printer for banners, large posters and signs.

Large projects include the production and distribution of membership materials and cards, NEA-RA elections, candidate recommendation materials and mailings and materials for various conferences including Annual Meeting. The staff has continued to scan archived MTA documents. This work includes creating structured, searchable PDFs.

## **HUMAN RESOURCES DIVISION**

This division has undergone significant turnover and instability over the course of several years. As a result, many HR systems and processes have been in need of repair or development. Hiring a new HR director was put on hold while the HR recovery project was developed and implemented. Due to the hard work of the division's staff and consultants, most of the HR systems are now in good shape and a new HR director came on board just weeks ago. This division collaborates with all divisions to ensure that staff are provided the necessary support in order to do their jobs well.

## **MTA BENEFITS**

MTA Benefits' mission of helping members achieve greater personal financial security and economic savings through member benefits programs was front and center in all it did this past year. On April 1, 2024, MTAB recognized its 55th anniversary. MTAB is proud of the personalized support and advocacy it provides, while offering members and their families the tools, resources and benefits they need to succeed in both their professional and personal lives. MTAB's commitment to the well-being of members can be illustrated by a few initiatives.

With student loan debt top of mind for so many members, it continued to offer invaluable programming on **Teacher and Public Service Loan Forgiveness**, allowing members to experience significant economic relief. In January 2024, it surpassed 100 student loan debt management webinars and registered nearly 450 members in sessions this year. The webinars and services provided by partner Cambridge Credit Counseling are at no cost to members. Finally, MTAB began providing webinar attendees with Certificates of Attendance for these and other educational webinars, providing members an opportunity to receive PDP credits.

MTAB advanced its efforts to **welcome new members** and introduce them to the many services that come along with their MTA membership by creating an **MTAB introduction video** as well as an interactive experience called the Member Lounge. The virtual lounge provides personalized benefit suggestions based on the members' specific needs. Further initiatives to better reach all members included publishing benefits material in Spanish and Portuguese and enabling MTAB's website to be translated into more than 10 languages.

One of the most important benefits MTAB offers is the **MTA Disability Insurance program**. To date the plan has paid out \$39 million in benefits to members when they needed it most. Nearly one-half of MTA locals offer the program to their members. The annual open enrollment period each spring offers eligible members guaranteed issue coverage. In addition, all new members are now eligible to enroll in the plan during their first membership year.

MTAB also enhanced its insurance offerings this year by introducing a **hybrid long-term care plus life insurance program**. A member who obtains coverage under this plan can draw on the life benefit to cover long-term care needs. Best of all, during the open enrollment period members are guaranteed coverage up to a specified limit.