

ANNUAL REPORT OF THE EXECUTIVE DIRECTOR-TREASURER TO THE ANNUAL MEETING OF DELEGATES Fiscal Year 2022-2023

The MTA has reached a uniquely powerful moment in its 178-year history. Our schools and colleges continue to confront the relentless anti-democratic, rightwing effort to dismantle public education, and MTA is well-positioned to resist those assaults. At the same time, MTA is primed to draw strength from the renewed popularity and activism of organized labor across the country as we build on the momentum of our groundbreaking statewide and local campaigns. We are stronger and better-equipped than ever as we strive to build a future in which all educators are respected and provided with the resources they need to meet the evolving needs of our students and all students can reach their full potential and thrive.

To fully appreciate the accomplishments of the past year requires us to step back in time, to 2018. That's when every public-sector union in Massachusetts was bracing for the U.S. Supreme Court's *Janus* decision. The predictions were dire. The *Janus* decision ultimately would eliminate agency fees for public-sector unions, establishing so-called "right-to-work".

What's important to remember is that *Janus*, along with dozens of other legal cases in the pipeline aimed at undermining unions, was bankrolled by the same millionaires and billionaires who seek to privatize public education. Their aim then, as now, was to not only weaken our ability to protect the rights of union members, but to undermine one of the most pro-democracy institutions in the political landscape. With a now-solid and increasingly extremist conservative majority on the Supreme Court, the threat of ongoing assaults aimed at unraveling the very foundations of unionism, public education, and voting rights loom large.

The *Janus* decision was a turning point, but not because the feared catastrophe came to pass. Instead, it was a turning point because MTA's bold response to the case fortified our ability to confront the challenges facing unions, our schools and colleges – and the future of U.S. democracy.

That response was the decision to invest in the All In campaign. All In was modeled on the fundamental building block of organizing: one-on-one conversations. By hiring organizers to support local membership campaigns, tens of thousands of conversations took place. Another key initiative of All In was the Summer Member Organizer program, in which MTA members walked door to door to hear the concerns and hopes of their peers and sign them up for the union. This foundation of the All In campaign continues to undergird our member activism today.

MTA made another bold move in 2020 when it adopted the Blueprint Strategic Priorities. The culmination of an extensive process that included a survey of local presidents, over two dozen member focus groups, and joint labor/management committees, the Blueprint set the course for continuing to transform MTA into a new kind of union, one that's not only ready to withstand assaults on public education, but also win major gains at the bargaining table and significant statewide policy initiatives.

By connecting members to the life of the union, developing new leadership, and centering our values in economic, racial, and social justice, all part of the Blueprint framework, we are stronger than ever.

It was All In and the Blueprint that enabled the MTA to not only weather the COVID-19 pandemic, but face it with unwavering health and safety advocacy for our members and remain one of the most respected voices in the public's eye on education issues.

The attainment of the All In and Blueprint initiatives – and our readiness for the future – starts with membership.

Membership

Membership is the heart and soul of our collective power as a union.

Prior to the pandemic, MTA membership had been trending upward, with modest increases each year, and reached a high of over 117,000 in fiscal year 2020. As we all know, our schools and colleges were then hit hard in the first year of the pandemic and membership dropped by approximately 3,000. However, over the last two fiscal years, the membership tally has regained much of the lost ground, and it continues to approach its pre-pandemic level.

We look at membership in two ways – through the total number of members and FTEs, full-time equivalents. As explained in the budget book, FTEs are the basis for MTA's revenue projections. Actual FTEs as of March 2023 are not only higher than pre-pandemic levels, but they are higher than they've ever been! What all of this adds up to is an MTA that has demonstrated its resilience in the face of a multitude of challenges.

Fair Share: A Victory to Celebrate... and the Work Continues

The victory of the Fair Share Amendment has earned its place in history and as the centerpiece of this 2022-23 Annual Report. Fair Share was a landmark accomplishment that involved every division of the MTA and tens of thousands of its members. It is one example of how the MTA dared to think BIG and won. It is an example of how the hard work of building and maintaining coalitions like Raise Up Massachusetts (RUM) are key to a winning strategy and long-term partnerships. And it is an example of how the MTA – as the largest union in New England and a leader in the labor movement in backing a common good agenda rooted in economic and racial justice – has the people power and resources to achieve major policy gains. Nationally, only about one third of revenue measures put before the voters have won. Moreover, Fair Share was the first successful revenue ballot measure requiring a constitutional amendment. Let's continue to celebrate and learn from this stunning victory as we do the hard work of making sure that Fair Share revenue is appropriately allocated to public education and transportation priorities.

As crucial as it is, raising the money is, of course, only the first step. Even before last November's victory, MTA's divisions were preparing to build a member-driven program to advocate for investments in the new legislative session: a "fair share" of Fair Share for priorities such as reinvestment in public higher ed, increased funding for school counselors, nurses, and

librarians, a living wage for Education Support Professionals, and expanded access to paid family medical leave. As of April 2023, both Governor Maura Healey and the Massachusetts House have proposed more than \$1 billion in new spending for public education, in preK-12 through higher education.

There are myriad ways that the Government Relations, Grassroots, Center for Education Policy and Practice (CEPP), Training and Professional Learning (TPL), Communications, Legal, and Field and Organizing divisions have coordinated their work and enhanced MTA's legislative advocacy to connect members to the life of the union and amplify our political power. From new advocacy tools on the MTA website to the many dozens of in-district meetings and phone-banks, taking action is easier than ever. Member education also has an important role in a coordinated policy campaign strategy. Workshops focused on the MTA's legislative campaigns are structured into all educational events and some form of legislative action is often carried out on the spot.

In addition to the Fair Share victory, MTA scored a number of noteworthy legislative and policy wins that protect the rights of and provide benefits to MTA members. A long-sought victory reopening MTRS Retirement Plus enrollment for educators who transferred into teaching in Massachusetts has impacted more than 6,500 MTA members. Passage of the Tomorrow's Educator Program funded a new debt-free option for teacher education at public colleges and universities in the state, and a parallel debt-forgiveness program is open to public school educators, including ESPs. Changes to the Emergency License program and an MTEL Alternative Pilot program allowing continued use of alternative testing options for licensure enable a more diverse and non-traditionally prepared workforce to obtain and stay in teaching roles.

Opportunities for members to engage in elections have also been enhanced. In 2022, MTA held several gubernatorial forums with its members, including a forum explicitly for members of color, structured around questions that came directly from the members. We initiated a more robust evaluation process by explicitly aligning candidate interview questions with MTA's legislative and political priorities and next will be focused on tracking how those candidates support MTA priorities now that they are in office.

Putting the Blueprint to Work

A prime example of how MTA is winning by putting the Blueprint to work – through connecting members to the life of the union, cultivating member leadership and advancing policy solutions that center economic, social, and racial justice – is the *Cherish Act* campaign. This is a coordinated project, spearheaded by MTA's Center for Education Policy and Practice (CEPP), the higher education Field and Organizing team, and the Government Relations, Grassroots, and Communications divisions, which set out to develop a comprehensive higher education funding plan.

The campaign began with work groups of leaders and members from all levels of higher education digging in on issues of student supports, fair wages and working conditions, affordability, and green and healthy buildings. These work groups examined both data and the

lived experience of members and centered the goal of creating a higher education system that is economically and racially just. Having members and leaders from all sectors of higher education at the core of this process allowed everyone to see issues from diverse perspectives and built a sense of solidarity, as well as a comprehensive policy proposal. Their proposal, which was then endorsed by HELC (MTA's Higher Ed Leadership Council) and the Government Relations Committee, is now a part of the updated *Cherish Act*. Furthermore, in addition to shaping the *Cherish Act*, their work contributed to pressuring the governor on fair wage increases in the collective bargaining process and working group members remain engaged in the advocacy work. Meanwhile, our higher education field team is building a broad and diverse coalition of labor, community and business leaders united around a vision of a higher education system that helps sustain a healthy economy and achieves an equitable and inclusive civil society. Significant parts of that plan have been included in the governor's budget, and the governor has already set parameters that allow for substantial raises for higher ed faculty and staff this year.

Another prime example of transformative policy solutions and advocacy anchored by the Blueprint priorities, and a new level of coordination among MTA's divisions, is the *Thrive Act*, a bill to end the high-stakes testing regime. For several years, pockets of activism have bubbled up around MCAS. For example, last year over 50 educators in Cambridge were conscientious objectors who refused to administer the test, and MTA local leaders in the southeast region were especially active in an anti-MCAS coalition. This year, that rank-and-file activism has coalesced into a statewide campaign. MTA leaders and staff have played a key role in forming and leading the Anti-MCAS Coalition and now, the *Thrive Act* Coalition. A statewide retreat of the anti-MCAS Coalition was organized in January by the Training and Professional Learning (TPL) and Government Relations divisions. TPL also organized a national webinar in collaboration with Uniting to Save Our Schools, Citizens for Public Schools, and AFT-Massachusetts, featuring leading scholars on testing, as well as MCAS-related workshops at MTA events, including the EMAC, Winter Union Skills and ESP conferences. Government Relations and CEPP worked with many of those organizations to develop the policy proposals and legislative language that became the *Thrive Act*, and MTA continues to support research on alternative testing models.

A petition drive has been launched in locals throughout the state enlisting rank-and-file members to make their voices heard as the practitioners who know what is best for the students they teach. The petition calls attention to the ways that the MCAS is causing harm to students and calls on school districts to remove the punitive elements of MCAS by supporting the *Thrive Act*. Some educators are also sporting T-shirts and stickers that say: "In Massachusetts we resist the MCAS."

In a related action, the MTA Communications division assisted with the release of an MCAS report produced by Citizens for Public Schools and FairTest in mid-April, and MTA is organizing a legislative briefing on the report for early May. This will be followed by a Thrive Coalition Lobby Day this spring. All of this activity is another example of how rank-and-file activism, coalition partnerships, and an integrated campaign with educational opportunities, local organizing

strategies, research, and legislative advocacy strengthen MTA's ability to advance policy solutions.

Already this year, MTA has collected more co-sponsors in the Legislature for its two top priorities – the *Cherish Act* and the *Thrive Act* – than all of last year.

MTA Locals on the Move

The fruits of All In and the Blueprint are clear and measurable in the victories scored by dozens of locals this past year. The acceleration of rank-and-file activism, of campaigns that center economic and racial justice, and of cross-local solidarity have produced groundbreaking contract gains and built stronger locals for the long haul.

Rank-and-File Activism: Expanded and democratized forms of bargaining are increasingly becoming the norm. More and more locals are launching negotiations by forming a CAT (contract action team) alongside their bargaining team. This past year, Quincy and other locals had CATs with over 100 members. More and more locals are engaging members in bargaining by having silent representatives or even open bargaining. Malden had as many as 100 silent reps at negotiations before transitioning to fully open bargaining with hundreds in attendance. At one point Haverhill held open negotiations in the high school gym to accommodate the number of members attending. Woburn had silent reps rotate into bargaining every two to three hours so that over the course of negotiations the entire membership had the opportunity to participate. More and more locals are planning strategic campaigns starting with regular, open communication with their members about developments at the bargaining table and escalating to actions such as mass rallies and speak outs at school committee meetings, work-to-rule, no-confidence votes, and even strike votes and striking. The trendsetting contract gains made possible by these local campaigns, supported by MTA's organizing and legal teams, have lifted the aspirations of locals across the Commonwealth.

Rank-and-file activism has extended to MTA's policy campaigns as well. Locals organized over 400 canvasses and phone banks in support of the historic Fair Share ballot win.

Economic and Racial Justice: The ESP PreK-12 Bill of Rights and Living Wage campaign has taken off this past year like never before. To date, over 180 MTA locals have adopted the bill of rights. With the emphasis on a living wage for ESPs, raising the standard of living for our lowest paid workers has become a centerpiece of bargaining. Over 25 locals have now established \$30,000 as a starting wage for ESPs, with top rates as high as \$50,000. Contract settlements have featured not only solid economic packages but common-good gains such as job protections and supports for newer educators of color and even housing relief for the families of students. Economic and racial justice goals are increasingly pursued outside of bargaining as well through member education, labor/management collaborations, and direct action aimed at pressuring school committees.

Representation for marginalized groups in the education profession, as part of our economic and racial justice agenda, extends into the ranks of local and MTA leadership bodies as well.

MTA has steadily developed ESP leaders through formal mentorship programs and ESP member organizers that have begun to produce changes in representation in elected positions both at the local level and on the MTA Board of Directors. Training opportunities are being made available to ESPs and activists of color through targeted recruitment for SDCs, Regional Representatives, and NEA's Organizing Fellowship and Pre-UniServe Academies.

Solidarity: Solidarity is a key source of local power, and this year has seen cross-local solidarity like never before. Activists are supporting the bargaining campaigns of other locals by showing up as silent representatives at their bargaining tables. The Merrimack Valley Bargaining Council has adopted bylaws as they take steps to develop common proposals and commitments, and locals in several other areas of the state are exploring the creation of bargaining councils based on that model.

Staffing

Staffing changes have been key to aligning MTA's resources with the Blueprint priorities. Significant positions added since the Blueprint was adopted include the Member Data Strategist, the Bargaining Campaign and Strategy team and Regional Organizers. This past year another new position was created: a Program and Leadership Development Strategist position in TPL focused on anti-oppression education. Although anti-oppression programming is a broad focus of the division and is integrated into the programming of every division, the new position allows for a deeper focus on the work. It enables MTA to specifically support committees, task forces and other entities involved in racial, economic and gender justice work with a consistent analysis, long-term strategic planning, resources and learning opportunities. It allows for a more meaningful integration of anti-oppression work throughout our events, the building of stronger sociocultural, political, and economic education offerings, and an infrastructure to support the work in the form of toolkits, website development and a resource library. In addition, TPL continues to be more intentional regarding the diversity of speakers, presenters and facilitators, in particular around race and job classifications.

Infrastructure

The work of MTA's programmatic and member-facing divisions is the work that's most visible to our members. Equally as important, however, to the successful and sustainable operations of the MTA are the operations divisions – Finance and Accounting, Information Technology, Printing and Mailing, Human Resources, and parts of Legal and Governance. Their work behind the scenes – from developing and monitoring the budget, to the annual financial audit, to providing and servicing computers for nearly 175 staff members, to administering a complex array of employee benefits, to printing tens of thousands of pages for the Annual Meeting of Delegates, not to mention locals throughout the year – is essential to a well-functioning MTA. This includes an assortment of special projects each year, which in 2022-23 included campaign finance compliance for the Fair Share campaign, completing the transition to a new investment advisor, renegotiating multiple office leases, overseeing one office move with potentially more to come as leases expire, and producing a complex, hybrid Annual Meeting in 2022. In addition, MTA Member Benefits (MTAB) broadened access and portability for members interested in

enrolling in short- or long-term disability insurance, enhanced counseling available on student loan debt, and expanded mental health services for members.

In Conclusion

Despite the Supreme Court *Janus* decision and similar lawsuits intended to undermine unions, despite widespread assaults on public education – from charter schools to vouchers, from banning books to prohibiting teaching the truth about the history of race in America – despite the pandemic and the toll it took on our members and our communities, All In and The Blueprint have given rise to a stronger MTA.

MTA members are more engaged than ever as a result of one-on-one organizing and open and democratized bargaining. That activism has led to trendsetting contract gains as well as more member involvement in shaping and advocating for statewide policy initiatives. Member advocacy combined with more collaboration with community partners and integrated campaigns across MTA’s staff divisions has translated into significant legislative and ballot wins and an MTA that is more influential in public arenas as a voice for economic and racial justice and a common good agenda. Importantly, all of our activism is undergirded by membership numbers that have rebounded following the pandemic and a fiscally healthy MTA.

MTA is primed to respond boldly to yet another unique moment in our history. But this time, unlike what we faced in 2018, the moment poses an opportunity rather than a threat. A wave of union organizing, worker activism and strikes has emerged over the past several years around the country, and even the world. That momentum presents an opportunity to energize and uplift our members and raise the aspirations of our own organizing, contract, and policy campaigns. With the foundation laid by All In and the Blueprint, and building on our recent achievements at the bargaining table and in the policy arena, MTA is ready to catch that wave.

