

February 2011

## MTA LEGISLATIVE PROPOSALS 2011-12

### How Does MTA Decide What Bills It Asks to be Filed?

MTA engages in a multi-step process to determine what legislation it will ask legislators to file and support for MTA members.

First, the Government Relations (GR) division makes recommendations to the Government Relations Committee (GRC) based on salient issues of concern to members, the progress and viability of previously filed legislation, and the current political environment.

Second, the GRC which is made up of a cross section of members appointed by the MTA president solicits suggestions from local presidents and members. It holds several hearings for members to present their proposals to the GRC.

Third, the GRC takes staff input and suggestions from the members and votes on a package of legislation.

Fourth, the GRC in turn recommends the package to the MTA Board of Directors.

Fifth, the BOD makes the final determination on what to include in MTA's legislative package.

### What Happens after the Package is Finalized?

The GR staff with support from other divisions drafts the legislation and finds sponsors who will introduce and support the legislation as it moves through the legislative process. Some of MTA's proposals are also supported by other unions and organizations and we work jointly with them to seek sponsors and co-sponsors.

This year all legislation to be considered for the two year legislative session had to be filed by January 21. There are usually over 8,000 bills filed at that time. The clerks in the House and the Senate will then assign



### Retired Members Committee 2010-2011

#### Chairs

Richard Liston, Everett\*

Kathleen Roberts, Raynham \*

#### Committee Members

Eileen Cleary, Brockton

Gladys Durant, Norton

Mary Gilmore, South Yarmouth \*\*

Stephen Gorrie, Andover

Robert Lague, Woburn

Paul Mazut, Lee

Paul McLaughlin, Pelham

Nancy Mickunas, Hanover

Kathryn Rogers, Taunton

Gerard Ruane, Malden\*\*

Louise Russell, Shrewsbury

#### Jo Ann Fitzgerald

Retired Members Service Specialist

[jfitzgerald@massteacher.org](mailto:jfitzgerald@massteacher.org)

617.878.8314

800.392.6175, ext. 8314

#### Jill Jackson

Retired Members Staff Assistant

[jjackson@massteacher.org](mailto:jjackson@massteacher.org)

617.878.8254

800.392.6175, ext. 8254

#### Massachusetts Teachers Association

20 Ashburton Place

Boston, MA 02169

800.392.6175

[www.massteacher.org](http://www.massteacher.org)

#### MTA Member Benefits

800.336.0990

[www.mtabenefits.com](http://www.mtabenefits.com)

#### MTA Membership Division

617.878.8118

800.392.6175, ext. 8118

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# LEGISLATION FILED FOR THE MASSACHUSETTS TEACHERS ASSOCIATION 2011-2012 SESSION

## QUALITY EDUCATION

### **An Act to Fulfill the Promise of Education Reform By Ensuring Adequate Funding for Student Success**

Establishes a Committee (legislation and administration) to oversee an independent study to determine the resources needed for students to achieve state education standards. This “adequacy study” is intended to guide Chapter 70 funding in future years.

*Filed by: Rep. Jason Lewis and Senator Gale Candaras*

### **An Act To Invest in Our Communities**

Provides mechanisms to raise \$1.3 billion in revenue to help protect and preserve our communities from the impact of significant anticipated budget deficits by: increasing the income tax rate to 5.95% while increasing the personal exemption to minimize the impact on middle income families and, establishing an 8.95% rate on capital gains and dividends and interest income providing a \$7,900 exemption for senior citizens whose incomes do not exceed \$40,000 for individuals and \$80,000 for couples.

*Filed by: Rep. Jim O’Day and Senator Sonia Chang Diaz*

### **An Act Relative to Improving Quality in Early Education and Care Through Center Based Child Care Providers**

Improves the quality of early education and care by providing for collective bargaining between workers at early childhood education and child care centers and the Common-

wealth about such matters as professional development and training, conditions affecting recruitment and retention, career ladders and rates of subsidy and reimbursement in state subsidized centers.

*Filed by: Rep. Steve Walsh*

## HIGHER EDUCATION

### **An Act Maintaining Faculty and College Excellence**

Requires that 75% of undergraduate courses be taught by full time tenure and tenure track faculty by 2017 and contains other provisions to help adjunct faculty including a possible career path.

*Filed by: Rep. David Sullivan*

### **An Act Increasing Grants and Scholarships for Public Higher Education Students**

Requires that no more than 50% of state scholarship and grant funds may go to students enrolled in private higher education institutions. (Under current programs, most state funds now go to students attending non-public colleges and universities.)

*Filed by: Rep. Sean Garballey*

## RETIREMENT

### **An Act Relative to Cost of Living Adjustments for Retired Public Employees of the Commonwealth**

Increases the base amount upon which cost of living adjustments for public retirees, spouses or other beneficiaries are calculated, from \$12,000 to \$16,000 upon passage of the legislation. Indexes further base

increases according to a schedule to what Social Security recipients are entitled.

*Filed by: Senator Richard Moore*

### **An Act Relative to the Optional Retirement Program**

Permits higher education faculty and certain administrators enrolled in the Optional Retirement Program, during a one-time 180 day period, to transfer with creditable service to membership in the state retirement system conditioned upon their payment of sufficient funds determined by the State Retirement Board ensuring that the state would be held harmless for costs accrued while they were enrolled in the Optional Retirement Program.

*Filed by: Senator Marc Pacheco*

### **An Act Relative to Adjunct Faculty Pensions**

Allows part-time faculty who teach at least four, three or more credit courses per calendar year at one or more state higher education institutions to earn a year of creditable service for this time.

*Filed by: Senator Pat Jehlen*

### **An Act Relative to the Retirement Options of Certain Educational Personnel**

Authorizes school nurses, social workers, early education teachers, occupational and physical therapists, and school business administrators to participate in the teacher retirement system or the alternative superannuation retirement benefit program; extends the deadline for participa-

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# COLA PRIMER

The following information should be helpful as you review the COLA legislation on page 5.

In January of each year, an actuary employed by the Public Employee Retirement Administration Commission files a report with the Legislature on any increase in the U.S. Consumer Price Index. It may include a recommendation that the Legislature enact a cost-of-living increase in retirement allowances.

If the Legislature determines that a cost-of-living increase is required, it establishes the amount of the increase, which cannot exceed three percent. It is important to understand that the cost-of-living adjustment is only applied to a maximum of \$12,000, no matter how much a retiree's pension might be.

For members of the state and teacher's retirement systems, this increase – up to three percent of the first \$12,000 in benefits – is then added to the retirement allowances of those retirees or beneficiaries who were receiving pensions as of June 30 of the preceding year. The COLA increases are paid from the investment income account of the state and teachers' retirement systems.

Retirement systems other than the state and teachers' systems must adopt G.L. c32, Section 103, in order to establish a cost-of-living adjustment for their members and beneficiaries. If the local system adopts the



*Bob Brousseau testifies about the COLA. Kathleen Roberts, Retired Members Committee Co chair and then MTA president, Ann Wass joined Bob in testifying.*

recommended COLA, as is the case with the state and teachers' systems, it applies to only the first \$12,000 of one's retirement allowance. It is funded from the income account of the system. As is true for the state and teachers' systems, only those members receiving a retirement allowance as of June 30 of the prior year will receive COLAs.

It is important to understand that the fiscal year determines the schedule for COLA eligibility; the fiscal year runs from July 1 through June 30. For example, if someone retired on July 5, 2010, and the Legislature approves a COLA in January 2011, that person would not be eligible for this particular COLA because he or she was not receiving a retirement allowance on June 30, 2010.

The MTA continues to advocate for an increase in the COLA that is received by its members. The MTA Division of Governmental Services proposes and monitors legislation that deals with members' pensions as well as the COLA.

the bills a number and assign them to a committee where a hearing and a determination on the bill will be made. This process takes several months.

Once a bill is assigned to a committee, the chair of the committee will determine when a hearing will be held on the proposal. In some cases, a bill will not have a hearing until over a year after the bill has been filed.

## **How Can MTA Members Influence the Process?**

Legislation that has a lot of interest on the part of voters is often moved to the head of the line. Therefore, the more members who talk to their representatives and senators about MTA's proposals the more likely a hearing will be scheduled quickly and the bill will move to the next step in the legislative process.

Meetings by MTA members with their legislators plus keeping in regular contact on these issues with them are essential to getting action on legislation.

Only about 200 bills of the over 8,000 bills filed ever become law in a two year session. (For a more detailed account of "how a bill becomes law" – go to [www.sec.state.ma.us/trs/trslaw/lawidx.htm](http://www.sec.state.ma.us/trs/trslaw/lawidx.htm).)

## **How Can I Keep Track of the Progress of MTA's Legislation?**

On MTA's web site, there is a "tracking chart" of the status of all MTA's legislation as well as key proposals that MTA lobbyists are monitoring and in many cases lobbying either in support of or opposition to. The chart is updated on a regular basis.

More detailed fact sheets about the specific legislation will be available on the web site once bills have been assigned to committees.



# HUMAN & CIVIL RIGHTS AWARDS NOMINATIONS DEADLINE MARCH 4

Since 1983, MTA's Human Relations Committee has reviewed and selected nominees for the annual MTA Human and Civil Rights Awards, which are presented at the association's Human and Civil Rights Awards Banquet.

This event, attended by educators from across the state, serves as a vehicle for bringing human and civil rights concerns to the membership and as a teaching tool about how associations and individuals can advocate and advance rights for all.

This award also honors MTA members and others who have put their lives, employment and professional careers on the line in defense of human and civil rights.

Nomination materials must be received no later than March 4, 2011.

Awards will be presented at the MTA Human and Civil Rights Banquet on May 13, 2011.

You can access a nomination form on the MTA website at [www.massteacher.org/news/archive/2011/01-21.aspx](http://www.massteacher.org/news/archive/2011/01-21.aspx).

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MASSACHUSETTS TEACHERS  
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tion in the alternative superannuation retirement benefit program.

*Filed by: Senator Brian Joyce*

## **An Act Relative to Non-Public School Service**

Permits K-12 teachers and higher education faculty who taught in non-public educational institutions to purchase up to three years of that service toward retirement

*Filed by: Rep. Cheryl Coakley-Rivera*

## **An Act Relative to Creditable Service for School Nurses**

Permits school nurses to buy back up to three years as creditable service for any period of work experience in the nursing field.

*Filed by: Senator Tom Kennedy*

## **ELECTION LAWS**

### **An Act to Protect the Integrity of Initiative and Referendum Petitions**

Amends the procedure of initiative and referendum petition signature collection; requires persons gathering signatures to register with the state; requires all petitions to contain a printed affidavit; prohibits payment of signature gatherers at a rate based on the number of signatures collected; prohibits persons from collecting signatures for more than one question at a time; requires all paid signature gatherers to register with the Commonwealth.

*Filed by: Senator Stanley Rosenberg*

## **Frequently Requested Contact Information**

**Massachusetts Teachers'  
Retirement System (MTRS)**  
[www.mass.gov/mtrs](http://www.mass.gov/mtrs)

MTRS Headquarters  
One Charles Park, 2nd Floor  
Cambridge, MA 02142  
617.679.6877

MTRS Western Office  
One Monarch Place, Suite 510  
Springfield, MA 01144-4028  
413.784.1711

**State Board of Retirement**  
[www.mass.gov/treasury/srb.htm](http://www.mass.gov/treasury/srb.htm)

Boston Office  
One Ashburton Place, Suite 1219  
Boston, MA 02108  
617.367.7770

Springfield Office  
463 Dwight Street, Room 109  
Springfield, MA 01103  
413.730.6135

**Questions regarding your  
MTA Member ID Card or Calendar  
can be directed to:**

**Renee Gatewood**  
[rgatewood@massteacher.org](mailto:rgatewood@massteacher.org)  
617.878.6175, ext. 8208

## COLA BILL

### **A**n Act Relative to Cost of Living Adjustments for Retired Public Employees of the Commonwealth



*Chief Sponsor: Senator Richard Moore (D), Uxbridge*

Summary: The major feature of this bill increases the base on which

a retired public employee's annual inflation indexed cost-of-living adjustment (COLA) is computed from \$12,000 to \$16,000 immediately. Subsequently, this bill gradually increases that base over a period of fifteen years to an amount that approximates what Social Security uses for its maximum allowance when calculating an annual COLA. (For 2011, Social Security's maximum benefit for a worker retiring at 66 is \$2,366 per month or \$28,392 annually.)

Reasons for Passage:

#### **The COLA amounts to less than 99¢ a day**

The maximum annual COLA that a retiree or survivor can receive has been \$360 since 1999. With a maximum monthly COLA of just \$30, or less than 99¢ a day, it is not hard to see why an increase in the base is warranted. The COLA base was set

at \$6,000 in 1971 and that has only doubled to \$12,000 during the past 40 years.

#### **Retirees feel the impact of inflation**

Retirees are finding it increasingly difficult to keep pace with inflation. The cost of prescription drugs, out-of-pocket medical expenses and monthly health insurance premiums continue to increase year after year.

#### **Social Security base is reasonable**

All retirees should receive a COLA based on their full pensions but not less than what Social Security recipients are entitled. This bill simply pegs the state COLA base to approximate what Social Security is doing now for its enrollees.

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## LOOKING TO HONOR ONE OF OUR OWN AWARD

The MTA Retired Members Committee is now accepting nominations for the 2011 Looking to Honor One of Our Own Award. Nominees must be active or retired MTA members.

Each year, the MTA Retired Members Committee sponsors the Looking to Honor One of Our Own essay contest. This contest provides the opportunity for an active or retired MTA member to be honored for his or her influence on the behalf of students, beginning educators and association members.

Deadline for nominations is May 1, 2011. The award will be presented at the MTA Retired Gathering on September 27, 2011.

Nomination forms are available at the link below or by contacting Jill Jackson at [jjackson@massteacher.org](mailto:jjackson@massteacher.org) or at 617.878.8254.

[www.massteacher.org/news/archive/2011/~//media/Files/PDFs/ourown11.pdf](http://www.massteacher.org/news/archive/2011/~//media/Files/PDFs/ourown11.pdf)



*MTA Vice President, Tim Sullivan, with 2010 Honor One of Our Own recipients, Gladys Durant and Patricia Haraas.*

# REPORT OF THE CHAIRS

By Kathleen Roberts & Richard Liston

This edition of the MTA Reporter contains information about legislation filed for MTA by Senator Richard Moore (D), Uxbridge. This legislation seeks to address the cost of living adjustment (COLA) that is received by public retirees and their spouses or other beneficiaries.

MTA retired members and others are very aware of the inadequacy of the current COLA. The base upon which the COLA is calculated is a mere three percent on the first \$12,000 of pension earnings. This amounts to less than 99¢ a day!

Members of the Retired Members Committee and staff in the MTA Division of Governmental Services receive many comments, concerns and complaints about the COLA. We must work to change this situation. We must ask ourselves, "What can I do to help improve the COLA?"

We would like to offer you some simple suggestions about helping to raise the COLA.

- Sign up for the MTA Retired E Lert System – ***NOW***.

This system allows you to receive e-mails directly from our Retired Members Service Specialist. The system is secure and your e-mail address will not be shared with anyone outside of MTA.

- Visit the MTA website at [www.massteacher.org](http://www.massteacher.org).

The MTA website provides information about legislation, conferences and educational issues for active and retired MTA members.

- Get to know the senator and representative who represent you in the state legislature.

It is important that legislators can connect a face to the COLA problem.

- Know how to contact your legislators at the State House and in their district offices.

A simple phone call, message or e-mail will go a long way.

- Volunteer to lobby your issue.

MTA will sponsor Lobby Day activities this spring. Join others at the State House, making phone calls or e-mailing legislators.

## MTA Retired E lert Sign Up

Are you a MTA Retired member who is missing out on important information?

MTA Retired members are eligible to receive important information as a member of the MTA Retired E lert group.

Retirees receive information at their home e-mail addresses. E-mail addresses never appear in the messages for anyone else to view.

E lerts that have been sent have included messages about the Social Security Offsets, COLA, MTA Annual Meeting, legislation filed for MTA and federal taxes on pensions.

*To receive regular updates of interest to retirees, please send your name, complete home address, MTA ID number, former local association affiliation and home e-mail address to Jo Ann Fitzgerald, MTA retired members service specialist, at [jfitzgerald@massteacher.org](mailto:jfitzgerald@massteacher.org).*

# BOB BROUSSEAU RECOMMENDED FOR RE-ELECTION TO PRIM BOARD

By Bob Duffy

**M**TA member Robert Brousseau is seeking a ninth term on the Pension Reserves Investment Management Board, and his candidacy carries the recommendation of the MTA Board of Directors.

“I am very appreciative of the tremendous support I have received from the MTA and all of our members over the past 24 years,” Brousseau, a retired Wareham teacher, said after receiving the endorsement at the Board’s December meeting.

The PRIM Board acts as the trustee for each retirement system that invests in the Pension Reserves Investment Trust Fund. The nine-member board is responsible for the control and management of the PRIT Fund, which includes retirement money for teachers.

Those eligible to vote in the election for the PRIM Board, including teachers who participate in the state retirement system, should receive their ballots in the mail by April 1. The ballots must be mailed back to the PRIM office by May 2. The term begins in July and runs for three years.

MTA President Paul Toner is strongly urging members to support Brousseau’s re-election. “Bob has a long and admirable track record of advocating both for the interests of teachers and for the overall strength of our state pension system,” Toner said.

“MTA members should be certain to watch the mail for their ballots and to support his re-election. He is a

genuine expert, and we need his continued guidance on the PRIM Board.”

The PRIM Board is chaired by the state treasurer. The governor or a designee is also an ex-officio member. In addition, the governor appoints two members, and the treasurer appoints one member.

One of the elected members of the State Employees’ Retirement Board and one of the elected members of the State Teachers’ Retirement Board also serve on the PRIM Board. In addition, the employees and retirees of the state employees’ and state teachers’ retirement system each elect one PRIM Board member.

Brousseau is seeking re-election to the teachers’ retirement system seat. He will be running for the position against Joseph V. Elia of Woburn, who gathered the 75 signatures of PRIM participants required to have his nomination certified. Elia is the assistant superintendent for finance and operations for the Woburn Public Schools.

“Now that we have certified candidates, the next step is the election,” said Paul Todisco, senior client officer for the PRIM Board. “Ballots will be shipped to all active and retired members of the retirement system.”

Brousseau has been the elected representative for the teachers’ retirement system since 1987 and is currently the chair of the PRIM Board’s Administration Committee.

“Over the years, I have been committed to ensuring the highest investment returns, to fully funding our pension system and to increasing retirement and COLA benefits,” said Brousseau, who has extensive experience with pension-related issues.

Brousseau is a longtime MTA activist who has served on both the MTA Board and the MTA Executive Committee, as well as the Wareham School Committee. In addition, Brousseau has been a presenter on pension-related issues at the MTA Summer Conference.

## NUMBER OF BILLS FILED FOR THE 2011-2012 LEGISLATIVE SESSION

# 5,367\*

*\*When members of the House and Senate file legislation, each piece of legislation is given a docket number - HD for House bills and SD for Senate bills. These docket numbers will then be changed to bill numbers. You will be notified when bill numbers have been assigned.*

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