

RETIREES STEP UP TO PARTICIPATE IN FOF ADVOCACY

By Scott McLennan



Photo by Sarah Nathan

Malden Education Association President Deb Gesualdo, left, and MTA Retired Members Committee Chair Jacqueline Gorrie took part in the launch of the Fund Our Future campaign.

MTA retirees are playing an important role in the Fund Our Future campaign, devoting time to advocate for bills that will improve the state's investment in public schools, colleges and universities and providing insight into why this fight is so important for Massachusetts students.

Retired educators were prominent at State House events announcing the Promise Act, which is aimed at improving funding for preK-12 public schools, and the Cherish Act, which would boost the state's investment in public higher education.

"We retirees are in an especially good position to advocate for public education issues," said MTA Retired member Dennis Naughton. "Not only do we have the experience in the classroom from which to argue our case to legislators, but many of us are lifelong MTA activists who have the know-how and relationships to help get the job done on Beacon Hill."

MTA Retired Members Committee Chair Jacqueline Gorrie said she witnessed the benefits of reinvesting in public preK-12 education that were brought about by the 1993 Massachusetts Education Reform Act. But she also saw funding dry up in ensuing years as educators were asked to do more with less.

"We were able to restore our curriculum review committees. We were able to have hope that our classroom resources would not be cut in the future, but instead be sustained and increased," she said. "But as time passed, the money from the state plateaued, as did the progress we were making."

» continued on PG 4

RETIREED MEMBERS COMMITTEE 2018-2019

CHAIR

Jacqueline Gorrie, *Randolph***

VICE CHAIR

Julia Monteiro Johnson, *South Dennis*

COMMITTEE MEMBERS

John DeCicco, *Leominster*

Silvia Golijov, *Ashland**

Kenneth Haar, *Naples FL*

Kathleen Harrigan, *Hanover*

Andrei Joseph, *Chestnut Hill*

Paul Mazut, *Lee*

Patrick Patterson, *Ipswich*

Lois Powers, *Quincy*

Gerry Ruane, *Malden***

Beth Stafford, *Whitman**

Robert Travers, Jr., *Cambridge***

Anne Wass, *Carver***

RETIREED MEMBERS ORGANIZER

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* Appointed Active Member

** MTA Board of Directors

MESSAGE FROM THE CHAIR

Jacqueline Gorrie



MTA Retired Members Committee
Chair Jacqueline Gorrie

When we retired from our classrooms and our workplaces, our commitment to public education and its future did not end with the last bell. As retirees our commitment remains as we demonstrated on December 18, at the State House, for the kick-off event to announce the *Promise Act* and *Cherish Act*. Retired members were at the State House supporting our active members who were at

work educating students in schools that are in much need of improved funding.

Like you, I remember the influx of state dollars that came to our schools with the passage of the *1993 Massachusetts Education Reform Act*. We welcomed the state funding, which allowed us to restore programs, restore resources

and restore hope that a committed source of funding from the state would be there for our schools annually. But as time passed the money from the state was inadequate and 25 years later inadequate is putting it mildly.

Just as there has been no significant change to the foundation budget for schools in 25 years, there has been no significant increase in the COLA base for retirees. I cannot help but see that parallel between the ways our public schools and benefits for retirees have been funded. When the economics of school budgets or retirees' livelihoods change, so too must the recognition by our elected leaders that the money provided to public schools and public school retirees must increase—not simply to catch up, but to keep up.

That is why I ask that as retirees we get involved in the *Fund Our Future* campaign. The passage of the *Promise* and *Cherish Acts* are essential to the future of our schools, colleges and universities and the communities that we all deserve. ■

MTA RETIRED Spring Brunches

TUESDAY, APRIL 23

Verve, Natick | 11 a.m. – 2 p.m.

THURSDAY, APRIL 25

Holiday Inn, Mansfield | 11 a.m. – 2 p.m.

WEDNESDAY, MAY 8

Cape Codder, Hyannis | 11 a.m. – 2 p.m.

TUESDAY, MAY 14

Four Points Sheraton, Wakefield
11 a.m. – 2 p.m.

TUESDAY, MAY 21

Delaney House, Holyoke
11 a.m. – 2 p.m.

Visit [massteacher.org/retired](https://www.massteacher.org/retired) to register.

LEGISLATIVE UPDATE

Updates on MTA Priority Legislation

Ensuring a Fair and Dignified Retirement

S.1481, An Act to provide fair and affordable public retiree benefits

Senate Sponsor: Senator Julian Cyr; House Sponsor: Representative Dan Donahue

This legislation would help to provide public-sector retirees with a more secure retirement by:

- Immediately increasing the base on which the annual state pension COLA is calculated, from \$13,000 to \$18,000, and over time raising that base to align with Social Security's maximum allowable benefit for an individual worker.
- Freezing municipal retirees' health insurance premium contribution rates at the rates paid on the day of their retirement.
- Capping out-of-pocket expenses for non-Medicare eligible retirees.

An Act relative to the teachers retirement system (Senate)

An Act relative to the Massachusetts teachers retirement system (House)

Senate Sponsor: Senator Cindy Friedman; House Sponsor: Representative Tackey Chan

This legislation would fix a RetirementPlus enrollment issue impacting certain members of the Massachusetts Teachers' Retirement System who have previous creditable service from another Massachusetts contributory retirement system.

Fund Our Future

Promise Act — An Act providing rightful opportunities and meaningful investment for successful and equitable education

Senate Sponsor: Senator Sonia Chang Díaz; House Sponsors: Representatives Aaron Vega and Mary Keefe

The **Promise Act** would, over time, implement the four core recommendations of the Foundation Budget Review Commission, resulting in more than \$1 billion per year in new state funding. The bulk of those funds would go to districts with the greatest need and fewest resources. The formula would be changed to:

- Realistically account for districts' health care costs by using actual data to set insurance costs and inflation rates in the foundation budget.



- Modernize the formula to provide adequate support for English learners and low-income students.
- More accurately account for special education costs to better reflect actual SPED enrollment and the total costs that districts bear for out-of-district students.
- Increase state aid to certain districts to mitigate losses to charter schools.
- Guarantee minimum annual state aid increases to all districts of \$50 per pupil.

Cherish Act — An Act committing to higher education the resources to insure a strong and healthy public higher education system

Senate Sponsor: Senator Jo Comerford; House Sponsors: Representatives Sean Garballey and Paul Mark

The **Cherish Act** would reaffirm the state's commitment to public higher education by:

- Implementing over time the core finding of the 2014 Higher Education Finance Commission, resulting in more than \$500 million per year in additional funding for public higher education. These new funds must supplement — not supplant — existing funding.
- Establishing in statute a fair and adequate minimum funding level for public higher education at no less than the FY01 per-student funding level, adjusted for inflation.
- Freezing tuition and fees for five years, as long as the Legislature appropriates the funds required to reach FY01 per-student funding levels in five years. ■

► For a full listing of MTA legislative priorities, go to massteacher.org/legislation

SARAH SAYS

NEA Retired President Sarah Borgman

I used to tell my students, “We’ll MARCH into APRIL and then we MAY make it!” (Of course, those were the days when we finished school in May.) With the winter many of us have experienced this year, we’re still wondering if we MAY make it! However, amidst all of this I am aware that you’ve been busy cyber lobbying, doing face to face lobbying, writing those e-mails and letters, making your phone calls, working on membership, and on and on. The reassuring thing about my job is knowing you are always out in your states doing the jobs that are always ongoing and so necessary. For this, I thank you!

I am reminded of the necessity of the work we constantly do, not just for ourselves but for those who follow. Right now protecting pensions, Social Security, Medicare, prescription drug gouging, etc. stare us in the face, but for those who follow, these are their issues, too. Please



NEA Retired President Sarah Borgman

continue to be the guardians at the gate for those who will face these same issues. We need to do our best today to help others for their tomorrows. ■

RETIREES STEP UP TO PARTICIPATE IN FOF ADVOCACY *CONTINUED FROM PAGE 1*

Gorrie said that parallels can be drawn between the ways public schools and benefits for retirees have been funded.

“There has been no significant change to the foundation budget for 25 years, and no significant increase for years in the COLA base for retirees,” said Gorrie, referring to the Cost of Living Adjustment. “When the economics of school budgets or retirees’ livelihoods change, so too must the recognition by our elected leaders that the money provided to public schools and public school retirees must increase — not simply to catch up, but to keep up,” she added.

Retired Fall River educator Diane Desmond said the Fund Our Future campaign is about giving all students an equal chance at opportunities for an excellent education.

“Fall River is a low-income community, and there are many students who are English learners,” she said. “The public school staff is caring, dedicated, hardworking and committed to providing the best opportunities for

students. However, limited funds result in reduced support for the staff. Fall River needs to retain its educators and not lose them to communities with more resources to support them.”

She added, “Additional funding could be used to provide textbooks to all students so they would not have to share them. Schools could hire librarians. Class sizes could be reduced, especially in kindergarten, where some classes have close to 30 students.”

Malden Education Association President Deb Gesualdo welcomed retiree activism in the campaign. “The connection between retired members and active members is so important,” she said. “Working separately, we can’t do all that we need to for our profession, for our students and for our communities. But when we’re together, we are unstoppable.” ■

► For information on the activities of retired members, please visit massteacher.org/retired.

Be on the lookout for the Retired Members Survey coming your way in April!

BOARD OF DIRECTORS REPORT – MARCH 8-9, 2019

Gerry Ruane

President Najimy opened the meeting with remarks on International Women’s Day, noting that women are leading the “Red for Ed” movement and history will show how they lead the education movement that is all inclusive.

President Najimy introduced the interim Executive Director/Treasurer **Enid Eckstein**. Enid thanked everyone for making her feel welcome.

The Board acted on the recommendation of the **Electoral Review Committee**. Due to the changes in membership, a number of locals had to be moved to new districts. These changes will not take place until July 1. Please refer to the MTA website for the actual changes. Changes will be voted on by the Annual Meeting.

Theresa Montano, vice president of the California Teachers Association, addressed the Board about leading the “Red for Ed” movement. She discussed the Los Angeles teachers strike.

Report on the *Fund Our Future Campaign*:

Dave Danning, MTA’s statistics guru, compared MTA’s **Promise Act** with Governor Baker’s Bill. The **Promise Act** increases education funding by \$1.5 billion per year by 2026, with no new accountability requirements. The Baker Bill would increase state education funding by \$510 million by 2026 with new accountability requirements. The **Cherish Act** will put \$580 million into public higher education campus accounts and will freeze tuition and fees at current levels. President Najimy and Vice President Page explained how the Campaign will reach across the state. It will plan “Funding Fridays” in each local and school. There will be a rally or action planned for May 16. More information to follow.

On Saturday morning, Allison Cox, President of Quincy Education Association, addressed the Board concerning the proposed bylaw to have the entire membership vote on all executive offices and Board positions.

Christine Mulroney, President of Framingham Teachers Association, also addressed the Board about getting the post-*Janus* membership numbers out to local presidents.

Proposals. Kerry Costello, President of Andover Education Association, addressed the Board concerning a Bylaw that she submitted that would provide consequences for locals

and members who violate MTA policies.

Jill Coleman addressed the Board on behalf of FSO. They asked for an increase in the budget for more FSO staff.

Proposed Resolutions – Matt Bach, Chair of the Resolutions Committee, presented the proposed resolutions to be taken up at the Annual Meeting. These changes

would need a majority vote to be adopted. There are a number of editorial changes in the resolutions but there are also some very substantive changes, especially in the area of digital technology. The exact text may be found on the MTA website, massteacher.org/resolutions.

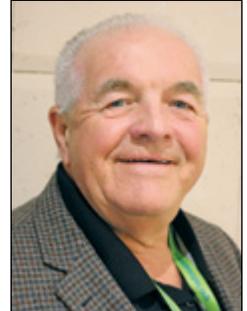
Proposed Bylaws and Standing Rules – Peter Schoonmaker, Chair of the Bylaws and Rules Committee, presented the proposed bylaw changes for the 2019 Annual Meeting. These changes would need a two-thirds vote to be adopted. The two most important proposed amendments are:

- » To create an ethnic minority seat on the Executive Committee. The language that has been presented will be amended at the Annual Meeting to say that any member may run for the seat. This is to comply with federal law. The Board recommended adoption 54-2.
- » To require that all elected and executive positions be voted on by the entire membership. This would move all elections to all member electronic voting. After much discussion of the pros and cons, the Board recommended adoption by 40-23

The text of all proposed bylaws, with Board recommendations, are on the MTA website. There were no Standing Rules submitted, however they may be submitted until the beginning of the Annual Meeting.

Budget:

The Board voted to recommend to the MTA Annual Meeting the adoption of the annual operating budget of \$46,845,152 and an operating budget dues level of \$477, based on 84,988 full-time-equivalent, active members for the 2019-



Gerry Ruane, MTA Retired Members Committee

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BOARD OF DIRECTORS REPORT *CONTINUED FROM PAGE 5*

2020 fiscal year. Dues for secretaries, clerks and custodians are to be \$287; dues for aides, food service personnel and other education support professionals are to be \$144.

An amendment that added \$5000 to the budget to fund calendars for the Retired Members was adopted.

PR and Organizing Budget:

The Board voted to recommend to the MTA Annual Meeting the adoption of the Public Relations/Organizing Campaign budget of \$1,699,760 and a Public Relations/Organizing Campaign dues level of \$20, based on 84,988 full-time-equivalent, active members for the 2019-2020 fiscal year. PR&O dues for secretaries, clerks and custodians are to be \$12; and for aides, food service personnel and other education

support professionals, \$6.

There was one new business item. It was moved that the MTA will publish a press release and/or an op-ed in the *Boston Globe* in support of the Youth Climate Strike on March 15. Adopted.

Policy changes adopted by the Board:

- » The New Member Committee charge has been changed from teachers to educators.
- » All new policy submissions will be submitted to the General Counsel for comment.

It was a long, but productive meeting. Adjourned at 5:00 PM Saturday, March 9, 2019. ■

ARE YOUR FAMILY MEMBERS SAVING WITH MTA BENEFITS?

Now that grandchildren are included in the definition of a family member who is eligible for family membership, make sure they're taking advantage of our great programs! Once their application has been approved, they'll receive a member card and be able to participate in MTA Benefits' programs. That means they'll save on auto and home insurance, student loan counseling, debt consolidation, wireless service, access nationwide discounts and more. Remember, a family membership costs nothing! What are you waiting for? Download the application at www.mtabenefits.com/family-members.

As an MTA member, you are entitled to the discounts and programs offered by MTA Benefits.

www.mtabenefits.com



MAY 16

OUR RED FOR ED MOMENT IS HERE

We have a once-in-a-generation chance to pass bills increasing funding for our public schools and colleges by more than \$1.5 billion a year. On May 16, the *Fund Our Future* coalition is planning State House actions during the day and a big rally on Beacon Hill in the late afternoon. Details will be posted at fundourfuturema.org.



“HONOR OUR OWN”



AWARD

NOMINATION FORM

AWARD TO BE PRESENTED
AT THE 2019 MTA RETIRED GATHERING

IS THERE AN MTA MEMBER WHO:

- Encouraged you professionally or personally?
- Fostered your involvement in the MTA?
- Mentored you as a beginning educator?
- Helped you as a student?

“HONOR OUR OWN”



AWARD

NOW IS THE TIME TO RECOGNIZE HIS OR HER CONTRIBUTION.

Each year, the MTA Retired Members Committee sponsors the “Honor Our Own” award. The award honors members of MTA Retired for their outstanding influence on students, beginning educators and association members. To nominate a retired educator, complete the nomination form and provide a written explanation of why you believe the candidate meets the guidelines for the award. The guidelines include demonstrated professional responsibility and achievement in one’s field; displays of leadership, creativity or innovation; evidence of the nominee’s impact on the school community, students and association; and examples of how the nominee has improved the image of public education.

WHO IS ELIGIBLE AND WHAT ARE THE GUIDELINES FOR THE AWARD?

Nominees must be MTA Retired members of the Massachusetts Teachers Association at present.

Please explain why the nominee should be honored. Consider the following about the nominee when you are writing your submission:

1. Professional responsibilities and personal achievements in his/her field.
2. Leadership, creativity or innovation.
3. Impact of the nominee’s professionalism on the school community, the students, the association and/or the community.
4. Advocacy for association members, the profession and public education.
5. Improving the image of public education.

HOW DO I SUBMIT A NOMINATION FOR THE “HONOR OUR OWN” AWARD?

1. Complete the nomination form.
2. Attach a written explanation about why the nominee meets the guidelines for the award. Follow the award guidelines listed above.
3. Mail or e-mail the completed application. Materials must be received no later than May 31.

“Honor Our Own” Award
Attn: Robert Whalen, MTA
2 Heritage Drive, 8th Floor | Quincy, MA 02171-2119
rwhalen@massteacher.org

For a copy of this nomination form, please visit: www.massteacher.org/honorourown

1

Complete the nomination form.

Nominee Information:

- Nominee is a member of MTA Retired.

Name _____

Address _____

City _____ State _____ ZIP _____

Home Phone _____ Work Phone _____

E-mail _____

Submitted By:

(Please check one)

- Member of _____ Association

- MTA Retired

Name _____

Address _____

City _____ State _____ ZIP _____

Home Phone _____ Work Phone _____

E-mail _____

This form may be printed and mailed or completed electronically and e-mailed. For best results, view the PDF in Adobe Reader.[®] Complete any fillable areas by typing in the fields or clicking on check boxes. Save a copy to your computer for your records.

2

Attach a written explanation of 250-500 words on why the nominee meets the guidelines for the award.

3

Mail or e-mail the completed application.

“Honor Our Own” Award
Robert Whalen, MTA
2 Heritage Drive, 8th Floor | Quincy, MA 02171-2119
rwhalen@massteacher.org

Materials must be received by the MTA no later than May 31. The decision of the Retired Members Committee is final.

Recent Recipients of the “Honor Our Own” Award

2018

Dr. Charles Levenstein, *professor emeritus, UMass Lowell*

Nominated by UMass Lowell professor Craig Slatin

“Dr. Levenstein integrates his academic work with advocacy and activism, supporting healthy and safe work and living conditions. In 1987, Dr. Levenstein wrote a successful grant proposal to the National Institute of Environmental Health Sciences and began a New England-wide worker health and safety training consortium that has lasted for 30 years. ... His advocacy for school health and safety continued with publication of his most recent book in 2014 — *The Toxic Schoolhouse* — a collection of articles on chemical hazards endangering students, teachers and staff in the U.S. and Canadian education systems.”

2017

Springfield Education Association Committee of Retirees

Nominated by SEA President Tim Collins

“The mission of the Tools 4 Teaching recycling store is to provide Springfield Public Schools teachers, especially new teachers, with quality educational materials for their classrooms at no cost. The Tools 4 Teaching store is a nonprofit organization that receives educational materials through many varied sources. Donations are received from local businesses and retiring teachers. This keeps quality and usable school materials out of landfills and puts them into SPS classrooms.... The T4T store and the social events that these hardworking, dedicated retirees manage promote unity among teachers and the community. This demonstrates to the public that we can all come together for the benefit of students — our future leaders.”

2016

Gladys Durant, *Retired — Bristol County Educators’ Association*

Co-Chair Richard Liston spoke for the Retired Members Committee

“As the Retired Members Committee contemplated the Honor Our Own award for 2016, it was a no-brainer that we needed to honor the life, career and service of Gladys Durant. She embodied everything this award was created to honor. Gladys was a dedicated educator in the Attleboro school system for over 30 years and was a very active member of her local association and of the MTA. After she retired, she continued to stay active, serving as a representative and former treasurer of the Bristol County Educators’ Association. She was also active within the MTA and was an active member of the Retired Members Committee at the time of her passing.”

2015

Susan Cogliano, *Stoughton science teacher*

Nominated by John Gunning, Stoughton Teachers Association

“Susan was a leader on the faculty. She served as team leader and then as department head at O’Donnell Middle School. Susan looked out for teachers, making sure they were properly provisioned. She guided new teachers, helping them adapt to their environment. Not one to give speeches, Susan’s leadership was seen in the way she would ‘check in’ with a colleague, offer assistance or guidance when needed, and quietly take the lead without being asked by someone.”

2014

Neil Clarke, *Lee Education Association*

Nominated by Joshua David Hall, Lee Middle School teacher

“Neil greeted me and all other new teachers with open arms and a joke, and was always ready to lend advice, a story or a friendly ear. He was also a huge proponent of the Lee Education Association and the MTA. Neil was always up to date on the political goings-on with MTA and politics in general. Even after Neil retired from teaching in 2006, the conversations continued and Neil’s involvement with the MTA continued.”

**Questions About the
“Honor Our Own” Award?**

Robert Whalen, MTA
2 Heritage Drive, 8th Floor | Quincy, MA 02171-2119
rwhalen@massteacher.org

For a copy of this nomination form, please visit: www.massteacher.org/honorourown

RETIRED MEMBERS COMMITTEE

Candidate Biographical Statements

The Retired Members Committee is described in Article X, Section 9 of the MTA Bylaws. There are eight members elected from the Statewide Retired District membership. Four terms expire each year. This election takes place at the MTA Annual Meeting among the delegates representing the Statewide Retired District. Those elected to the committee may serve up to three consecutive two-year terms.

Retired members may self-nominate to run for this committee, with nominations due by the first Friday in March. The election is conducted by the Credentials and Ballot Committee, which also conducts the lottery to determine the order of names on the ballot.

Those on the ballot in 2019 for the four open committee seats are listed below (in ballot order, per lottery):

1. Richard Liston | Everett, MA

Past Chair of the Retired Members Committee. I currently represent members on the Teacher Pension Board. Serve as a member on National Council on Teacher Retirement Trustee Education Committee as well as a member of the NEA Retired Membership Committee. I humbly ask for one of your votes. Thank you.

2. Seth Evans | Brookline, MA

I am recently retired from 18 years of teaching upper elementary in Needham. I have served as a building representative, a PAL, and am currently a member of the Education Policy and Practice Committee. I wholeheartedly support current leadership's efforts to build union power through active grassroots involvement.

3. Bonnie Page | Tewksbury, MA

I am a committed and passionate retired MTA member and would like to become a part of this committee. I know the issues that affect us, and I will be able to help inform our members across the state and help increase membership. Please consider voting for me. Thank you.

4. Rafael Moure-Eraso | Medford, MA

Both as a retired professor from UMASS Lowell, and as an immigrant to the United States from Colombia, I understand how public education must preserve democratic values for students and union members alike. Let us increase the political involvement of retirees and build our power.

5. Paul Mazut | Lee, MA

I'm seeking re-election to the Retired Members Committee. MTA Retired are an important part of the MTA. I want to continue to represent you and your interests on the RMC. I am asking for your support and vote to allow me to continue working for all retired members. Thank you.

Continued on next page

RETIRED MEMBERS COMMITTEE *continued*

6. Beverly Saccocia | Dennis, MA

I am requesting your vote for election to the Retired Members Committee. I have served on the MTA Board, MTA ESP Committee and Personnel Selection Committee. I would like to continue to be as active as I can be in retirement. I thank you for considering my candidacy.

7. Margaret (Terry) Gist | Stoneham, MA

I have worked for the Cambridge Public Schools for 35 years. I served as a Building Rep, on the Grievance Committee, the Negotiating Team, and as Vice President and President. I have attended many MTA and NEA-RA Conventions. I look forward to continuing to be actively involved in the union. Thank you for your consideration.

8. John DeCicco | Leominster, MA

I would like to continue to serve the retired members by continuing my work on this committee. Working the past two years with this dedicated group has been a rewarding experience and an opportunity to give back to our union.

9. Julia Monteiro Johnson | South Dennis, MA

I would appreciate re-election to the RMC. I have served diligently as I represented retirees at the State House, GIC hearings and whenever opportunities arise that show retiree solidarity with active members. I'm sticking with the union and hope you will stick with me as we "Fund Our Future." Thanks.

10. Ana Maria Nogueira | Boston, MA

As an active member, I tried to engage educators with our union. As a retired member, I will work to increase the base on which our state pension COLA is calculated as well as trying to guarantee that the percentage we pay for our health insurance will not rise.

11. Lois Powers | Quincy, MA

Dedicated, trusted, proven activist for improving quality of life for all educators and protecting our hard-won rights. Retired UMB Librarian, 2014 ESP of the Year, former Board Member and local officer. I respectfully ask for your vote so that I can continue striving to meet your expectations and our goals.

12. Kip Fonsh | Leverett, MA

If elected to the Retired Members Committee of the MTA, I pledge to work collaboratively with my MTA brothers and sisters to protect and enhance the rights and benefits of all retired MTA members. I have over 40 years of experience as a public school teacher, consultant and administrator.



FUND OUR FUTURE



Fund Our Future vs. Baker and Tucker Bills

In January, House and Senate legislators filed education funding bills supported by the MTA and the *Fund Our Future* coalition. The *Promise Act* (S.238/H.586) would make significant changes to the preK-12 foundation budget, increasing state and local spending on public schools, while the *Cherish Act* (S.741/H.1214) would require the state to phase in significant higher education increases over the next five years.

Two other foundation budget bills were also filed in January: Governor Charlie Baker's school funding plan (H.70) and a House bill filed by Representative Paul Tucker (H.576).

MTA simulations show that when fully phased in, the *Promise Act* would generate three times as much additional state Chapter 70 aid for schools as the Baker bill. Three-quarters of the new funds would go to the districts that educate the poorest students.

In addition, H.70 includes punitive top-down mandates that are not part of either the *Promise Act* or the Tucker bill. The Tucker bill does not fully specify a foundation budget funding increase for educating low-income students, making it impossible to estimate how much new Chapter 70 funding it would generate.

The governor also filed higher education funding initiatives via his FY20 budget proposal (H.1). But neither his higher education funding plan nor H.70 goes nearly far enough to guarantee the public schools and colleges our students deserve.

PreK-12 PROPOSALS – FUNDING DIFFERENCES

The *Promise Act* would implement all of the recommendations of the Foundation Budget Review Commission along with other funding improvements.

- ✓ It fully implements the FBRC's recommendations for greater support for educating low-income students and attempts to generate a more accurate count of these students, thereby providing significantly more aid to low-income communities than the other bills. Like the other bills, it also increases funding for educating students with disabilities and English learners and to address the cost of health insurance for staff and retirees.
- ✓ It provides relief to certain districts that lose significant amounts of Chapter 70 aid to charter schools.
- ✓ It guarantees all districts minimum increases in aid each year — \$50 per student when fully implemented.
- ✓ While providing more support for every district, it directs three-quarters of the new funds to the districts with the highest shares of low-income students.

H.70 and the Tucker bill would implement three out of four of the FBRC's recommendations and fail to fully implement the changes recommended for teaching low-income students. Both bills would leave the minimum aid calculation to the annual budgeting process. The Baker bill would provide additional reimbursement — but less than what is provided under the *Promise Act* — to certain districts that lose funds to charter schools, though only the lowest-performing districts would be potentially eligible for the additional funds. Under the *Promise Act*, all charter school sending districts are potentially eligible. The Tucker bill does not provide any additional relief to sending districts.

All three bills would increase Chapter 70 funding. Statewide, the *Promise Act* would provide three times as much new Chapter 70 funding to cities and towns as Baker's bill.

Here are current estimates of how much each of the bills would increase Chapter 70 aid over baseline —

with baseline being the level that would have been reached without new legislation. These are the totals for the final year, presuming a seven-year phase-in.

- ✓ *Promise Act*: \$1.5 billion.
- ✗ Baker bill: \$510 million.
- ✗ Tucker bill: Cannot be calculated.

All three bills would also increase the foundation budget for each district.

The foundation budget is the state's determination of the minimum level of expenditure required to provide an adequate education to all of a district's students. It is unique to each district and varies primarily due to demographic differences (e.g., the number of English learners or low-income students) among districts. It is funded from required local contributions and state Chapter 70 funds. Based on the same analysis, in year seven the statewide foundation budget would increase:

- ✓ *Promise Act*: \$2.4 billion.
- ✗ Baker bill: \$1.1 billion.
- ✗ Tucker bill: Cannot be calculated.

PreK-12 PROPOSALS – TOP-DOWN MANDATES

H.70 includes punitive top-down mandates. It would give appointed state officials more power to impose their will on districts and increase bureaucratic red tape. It would:

- ✗ Give the commissioner of education the power to withhold funds from certain low-scoring districts as leverage to implement “reforms” supported by the Department of Elementary and Secondary Education.
- ✗ Apply severe collective bargaining limitations currently in effect for “chronically underperforming” districts to a far greater number of so-called “underperforming” schools.

The *Promise Act* and Tucker bill do not include any new top-down mandates.

PUBLIC HIGHER EDUCATION FUNDING PROPOSALS

Although the governor's budget plan does acknowledge the need for a major reinvestment in public higher education, it is just a starting point. Rather than make \$100 million of it a one-time initiative directed at questionable programs, we believe it must be invested in the core educational mission of our colleges and universities and lead to freezing tuition and fees for students.

The *Cherish Act* calls for phasing in increases in campus and need-based scholarship funding over five years until they reach the level of per-student spending achieved in Fiscal Year 2001, adjusted for inflation.

- ✓ If this act were to be fully enacted in FY20, it would generate an estimated \$580 million for public higher education, setting a new baseline that would greatly increase college affordability, restore programs that have been cut, and fund fairer treatment of adjuncts and other staff.
- ✓ The funding levels generated by this act are in line with the recommendations of the 2014 Higher Education Finance Commission. Calculations based on those recommendations project that at least \$500 million more is needed to provide students and staff with the public higher education system they need to thrive.
- ✓ Tuition and fees would be frozen at current levels — as long as the state maintains its commitment to increasing funding each year for five years.

The governor's higher education budget does not include any commitment to long-term increases to restore funding to previous levels. It does include:

- ✓ A 5.5 percent average increase for operating budgets.
- ✓ A one-time College Affordability and Success Trust Fund to be used for certain initiatives and scholarship programs — programs that may help a few students but do not solve the affordability problem for the vast majority. The fund, meant to be spent over three years, could be up to \$100 million, but the actual amount would depend on state revenue levels.

We have a once-in-a-generation chance to win the funding our schools and colleges deserve.

The *Promise Act* and the *Cherish Act* bring us much closer to that goal than either the governor's proposals or the Tucker bill.

Read more about the *Promise Act* and the *Cherish Act* at FUNDOURFUTUREMA.ORG

Cherish Act Compared to Baker Higher Education Funding Plan

HIGHER EDUCATION FUNDING PROPOSALS	FUNDING IN FY20 OVER FY19 BASED ON FIVE-YEAR PHASE-IN	FUNDING IF FULLY IMPLEMENTED IN FY20	IMPACT ON TUITION AND FEES
CHERISH ACT <i>HIGHER ED FUNDING BILL: CAMPUS ACCTS. AND NEED-BASED SCHOLARSHIPS S.741/H.1214</i>	\$116 million	\$580 million	Freezes tuition and fees at current levels if state maintains funding commitments each year for five years.
BAKER'S PLAN <i>CAMPUS ACCTS. AND NEED-BASED SCHOLARSHIPS</i>	\$59 million Also establishes a trust fund of up to \$100 million, depending on revenues	N/A	No freeze

Promise Act Compared to Baker & Tucker School Funding Bills

FOUNDATION BUDGET BILLS	INCREASE OVER BASELINE IN CHAPTER 70 AID IN FY20	INCREASE OVER BASELINE IN CHAPTER 70 AID IN FY26	INCREASE OVER BASELINE IN FOUNDATION BUDGET IN FY26	NEW STATE AUTHORITY AND ACCOUNTABILITY MEASURES
PROMISE ACT <i>S.238/H.586</i>	\$181 million	\$1.5 billion	\$2.4 billion	NONE
BAKER BILL <i>H.70</i>	\$43 million	\$510 million	\$1.1 billion	<ul style="list-style-type: none"> Gives commissioner of education power to withhold funds from low-scoring districts — a means to force schools to adopt DESE “reforms.” Applies the bargaining limitations already in effect for “chronically underperforming” districts to “underperforming” schools, restricting educators’ rights to negotiate over student learning conditions.
TUCKER BILL <i>H.576</i>	Can’t be calculated	Can’t be calculated	Can’t be calculated	NONE

Read more about the *Promise Act* and the *Cherish Act* at FUNDOURFUTUREMA.ORG



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MTA **REPORTER**

RETIRED *The Voice of MTA Retired Members*

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