

**THE ANNUAL REPORT OF THE EXECUTIVE DIRECTOR-TREASURER**

An annual report typically reflects on the past year and its accomplishments. It feels incongruous, however, to look back at the year's highlights when, as of this moment, we remain at the height of a pandemic that is turning the world on its head. The effects on each of our lives, our communities, the U.S. economy, and our collective psyche are profound, and that includes the impact on our public schools and colleges. With all businesses operating remotely except those performing essential functions and stay-at-home orders in effect, many of us are struggling to adapt to the "new normal." At the same time, we wonder what the new normal even means and, particularly, what it means for the future.

In many ways, the pandemic has demonstrated the deep resiliency of the MTA. Within one workday, our staff pivoted to remote operations without any interruption in activity. Every single MTA division and staff member deserves a shout-out in this report.

Many of you have seen firsthand how the Affiliate Services and Higher Education field reps, organizers and coordinators mobilized to help locals negotiate countless MOAs protecting our teachers, Education Support Professionals, faculty and staff, and other members — and even assisted some locals in organizing mutual aid societies in support of students and their families. What may have been less visible is the Herculean task undertaken by the Governance and Administration Division, which had to quickly pivot to adapt the Annual Meeting of Delegates to a virtual format. Meanwhile, the Division of Training and Professional Learning canceled contracts with dozens of venues and hotels while helping to plan this and other events that had to be conducted remotely. The Communications staff is not only keeping information flowing, but also keeping the MTA in the news. The Center for Education Policy and Practice is analyzing newly urgent issues such as remote learning. The Printing and Mailing staff is making sure that important materials are produced on time and that the mail gets distributed. At the same time, Information Technology Services continues to introduce technological tools to facilitate remote work. The Legal Services Division continues its work on hundreds of cases, as well as becoming an overnight expert on everything you ever wanted to know about pandemics and the law. Government Relations and Grassroots continue to monitor all of our electoral and legislative priorities, even as new legislation is filed to respond to the coronavirus crisis. MTA Benefits converted the entire in-school disability campaign to email/online enrollment. And certainly, last but not least, the Division of Finance and Accounting is making sure membership issues are handled promptly and MTA vendors and staff get paid, while the Human Resources staff continues to respond to employee benefit requests, including COVID-related needs.

The MTA has been a leading voice during the pandemic on behalf of our public schools and colleges. We stepped out in front of the governor to call for the closing of all Massachusetts schools. We partnered with AFT Massachusetts to help shape guidelines issued by the Department of Elementary and Secondary Education on remote learning. Amid the chaotic response of higher education officials to the public health threat, we demanded that campuses be shut down. We have joined many of our allies to call for "Common Good" responses to the crisis, such as a freeze on all evictions. And just before this report went to press, the MTA led the successful campaign to cancel the MCAS tests for this year.

**WE ARE STRONG**

As we ponder what the new normal means for the future, we can derive hope from recalling the stunning victories over the past several years that attest to the power of the MTA and our strong foundation, even as we mark 175 years of proudly standing up for students and public education.

Let's not forget the lessons of our landslide victory over Question 2 in 2016. That 62 percent to 38 percent vote to prevent the boundless expansion of charter schools in our state demonstrated that grassroots activism can triumph over millions of dollars in television ads funded by a dark money front group.

Then in 2017, as the threat of the U.S. Supreme Court's *Janus* ruling loomed the following spring, the MTA invested in the *All In* campaign. Through thousands of one-to-one member conversations in locals and chapters across the state, the association fortified itself against the pending "drop" campaigns bankrolled by the same dark money billionaires who back charter school initiatives. And in the current fiscal year, the MTA has maintained its membership strength and has even grown, with new ESP units joining our union.



Lisa Gallatin

Lastly, had this year's Annual Meeting been our usual two-day gathering, we would have celebrated in person the huge gains made with the *Student Opportunity Act*. Two key goals of the yearlong Fund Our Future campaign were realized this past fall: the promise of \$2 billion in additional annual funding for preK-12 schools when the act is fully phased in, and an equally historic victory for equity with a long overdue recalibration of the Chapter 70 funding formula, directing much-needed resources to districts serving low-income communities with large numbers of immigrants and students of color.

The MTA was on track this spring to advance the *Cherish Act*, the higher ed component of Fund Our Future, when the coronavirus pandemic hit. The crisis has stalled most bills and discussion of the budget in the Legislature. At the same time, the upheaval on our public campuses is threatening the finances of our colleges and universities, with layoffs already taking place. Our position is clear: Now, more than ever, investing in public higher education is critical for the health of the Commonwealth.

## THE BLUEPRINT PROJECT

The MTA undertook a key internal endeavor this year as well: The All In Blueprint Project. The many members and staff working on the Blueprint Project established a collaborative process to develop a strategic framework for how the MTA can adapt to face both the challenges and the opportunities ahead.

The challenges continue to mount. The *Janus* decision was just the most recent step in a decades-long assault on worker and union rights and the public sector as a whole. Many years of so-called reform efforts that aim to privatize public education have been bankrolled by the same dark money billionaires. Even as the coronavirus outbreak paralyzed the country, President Donald Trump's National Labor Relations Board promulgated rules to make union election delays even tougher to overcome.

At the same time, we see much reason for hope. The Red for Ed movement has swept the country, and high-profile strikes in cities such as Los Angeles and Chicago demonstrated the success of Common Good bargaining campaigns built with students and families and through community partnerships. Within the MTA, we have seen the fruits of new bargaining and organizing strategies.

The success of the MTA's *All In* campaign demonstrated that educators see their union membership as essential to their professional respect and to their quality of life — and that they are willing to fight for their rights. The Blueprint Project builds on the lessons of the *All In* campaign to take a hard look at whether we are ready to conquer the challenges and amplify the opportunities ahead. Do we have the systems and the tools we need? Are we harnessing our capacity and power — both member and staff — to the fullest extent possible? Do we have the open minds needed to embrace innovation and change?

Last fall, two Blueprint working groups were formed, one representing a broad cross-section of member leaders and another being a labor-management group representing a broad cross-section of the staff. The member working group conducted a local needs assessment, with 244, or nearly two-thirds, of locals responding; 29 focus groups were held, and the MTA Board completed a questionnaire as well.

The preliminary results were presented at the Board's winter meeting and, through thoughtful and collaborative analysis, the following strategic priorities were adopted by the Board in March:

- Connect Members to the Life of the Union
- Cultivate and Support Leadership at All Levels of the Union
- Maximize Our Bargaining Power
- Advance Policy Solutions and Campaigns
- Lead on Economic, Social and Racial Justice

In addition to beginning the work of implementing the Blueprint strategic priorities this spring, we are, seemingly overnight, facing challenges we never could have anticipated:

- Despite funding victories for our preK-12 schools, an economic slowdown will mean shortfalls; we need to be ready to fight to keep our hard-won gains and also get ready for the Fair Share Amendment ballot campaign in 2022.

- With the potential of declining enrollment and new pressures to convert to online classes, our public higher ed institutions could be facing an existential threat; we can't let up on fighting for our vision of quality and affordable public higher education.
- In the midst of economic uncertainty, maintaining membership through effective grassroots engagement and leadership development cannot be taken for granted — but we must achieve it because member activism is the source of our power as a union.

I can't overestimate the power of being united in our union during the current crisis. It is by working in union that our locals have won critical protections for teachers, ESPs, faculty and staff, and other members during the coronavirus outbreak. It is by working in union that we have remained a leading voice on behalf of those most vulnerable to the economic hardships we now face. During the past several years, our victories have demonstrated more than ever that the MTA is powerful. And during these past several months, we have seen that the MTA, its members and its staff are also strong in a different kind of way: We are resilient, we are vital to the collective fabric of our society, and we are there for each other.

The following summaries of the activities of MTA divisions and departments over the past year were prepared before the pandemic disrupted all of our lives. But as they serve to indicate, we have good reason to be confident that no matter what happens, our member-driven union stands ready to build for the future, becoming even more powerful than it is today.

## AFFILIATE SERVICES

The division remains committed to engaging members and assisting locals in promoting the success of educators. It is dedicated to organizing for power and helping guide members into taking on stronger leadership and action roles as the MTA fights for the schools that Massachusetts students and our communities deserve.

Affiliate Services staff members actively consult with and represent locals in the negotiation and enforcement of more than 700 collective bargaining agreements statewide and help unrepresented public school educators form new bargaining units. The staff is active on MTA committees, including those focusing on large locals, student membership, ethnic minority affairs, Education Support Professionals, retirees and new members.

The following activities and programs have been among the division's priorities in 2019-2020:

**Fund Our Future.** The staff worked with local leaders and members to help pass the *Student Opportunity Act*, which will pump \$2 billion in new funding into public schools statewide each year when it is fully implemented. Most of the money will go to the districts with the greatest need. A defining moment of the campaign was on May 16, 2019, when thousands of MTA members and our coalition partners rallied on Boston Common and in Springfield and Pittsfield, sending a powerful message to legislators that increased funding could wait no longer. Now, the focus is on organizing at the local level to be certain the new funding is used in ways that frontline educators identify as critical for student success. In addition, the division is engaged in working with members to win passage of the *Cherish Act* — which would bring \$600 million a year into our public higher education system.

**All In.** Members and staff began the *All In* campaign more than two years ago to help build capacity and member involvement in every local. Locals continue to engage in efforts ranging from contract campaigns for better working conditions to fighting for respect and member input into education practices in every building. Increasing power and capacity in MTA locals begins with establishing and maintaining thorough new member signup and engagement programs. The division is partnering with all of our locals to comb through employee lists to identify and enroll all potential members in every district. All available information continues to indicate that when members reach out to members, those contacted stick with the union. In 2019, we again ran a comprehensive Summer Member Organizing Program. Coordinated by our organizers, this canvassing program sent nearly 100 members to knock on doors throughout the summer. Many of our SMOs have gone on to become local leaders and activists. The *All In* campaign is ongoing, and all locals are able to apply for grants to build their membership. One-to-one conversations based on local issues are key to the initiative.

**Open Bargaining.** Many locals are participating in more open approaches to bargaining. By and large, they are communicating on a regular basis to the rank-and-file membership and providing real-time updates about progress at the table. Many locals have gathered their members for focus groups to discuss issues they believe should be front and center. Members are speaking at the table with greater frequency. The division's bargaining summits are popular, featuring

leaders and members conducting sessions about their successes. Open bargaining strategies played a big part last October in Dedham, where members successfully conducted the first teacher strike in a dozen years in Massachusetts.

**High-Stakes Testing and Opting Out.** The staff continues to work to raise public awareness of — and support for — the MTA's efforts to combat the high-stakes use of standardized testing. The division's work involves internal organizing and building coalitions with parents and other community members, among other efforts. The staff is assisting locals with member and community forums to further the conversation about the schools our communities deserve.

## CENTER FOR EDUCATION POLICY AND PRACTICE

The center focuses on increasing the MTA's capacity to engage and mobilize members by influencing the policy debates and decisions that shape students' learning conditions and members' working conditions. The center works to ensure that all policies and regulations regarding education policy and practice reflect the perspectives and expertise of educators. Policymakers recognize the expertise of the CEPP staff on matters ranging from licensure to accountability to school finance.

The CEPP regularly advocates for MTA positions with the Department of Elementary and Secondary Education and the Board of Elementary and Secondary Education. The staff also assists members and MTA colleagues in understanding policy issues and their impact to support member engagement around these policies.

The center's work this year has focused on the following areas:

**School Funding.** The CEPP research staff has provided substantial support for the MTA's Fund Our Future campaign. The staff conducted analyses of the impact of legislative proposals and generated options to address shortcomings of financial and accountability provisions of Fund Our Future legislation. The staff also coordinated research to support higher education funding proposals.

**Student Opportunity Act.** The CEPP prepared materials to help MTA staff and members understand SOA funding at the district level. The center provided local leaders and staff with explanations of the requirements for the SOA district plan to support local advocacy on decisions about allocation of SOA funding.

**Educator Diversity.** Based on the work done regarding a 2018 New Business Item on Alternative Routes to Educator Licensure, the CEPP staff researched and prepared advocacy materials for proposals to address barriers to entering and advancing within the profession. Proposals have focused on policies to support paraprofessionals in completing licensure requirements, including the communications and literacy test. The center engaged with MassPartners organizations to identify and advocate for a comprehensive approach to recruiting and retaining a diverse teaching workforce.

**Vocational Technical Education.** Several policy issues related to vocational technical education have emerged over the past year, including proposed changes to admissions policies and new program models to increase access to career and technical education. The staff provided policy information, research and data analysis to assist leaders in developing MTA positions on these proposals.

**Licensure/Relicensure Requirements.** The staff continues to advise individual MTA members on educator licensure issues, from licensure requirements and audits to renewals. In 2019, the CEPP handled about 200 licensure cases.

**Teacher Leadership Institute.** The CEPP continued to administer the NEA Teacher Leadership Institute program. For the past five years, the program has offered members the opportunity to develop leadership skills in the areas of policy, association roles, and/or instruction. This year, almost 40 TLI fellows participated in the program.

**Communication.** The staff maintained a web page, *thepolicyminute.com*, to provide current information on a wide range of policy issues.

## COMMUNICATIONS

The division has continued to play a key role in the success of the Fund Our Future campaign, helping members win a once-in-a-generation victory last November when the *Student Opportunity Act* was signed into law. Another important focus this year has been the ongoing *All In* membership effort, which has helped the association remain strong despite the anti-union *Janus* U.S. Supreme Court decision and other challenges posed by the right wing.

Meanwhile, the staff has continued to highlight the many contributions of educators in all forms of public relations, participated meaningfully in the forward-looking Blueprint initiative, worked with numerous locals and chapters on organizing and media relations, and provided graphic design support and other types of assistance for the vast majority of MTA conferences and events. The division also has engaged deeply in promoting the passage of the *Cherish Act* as well as helping to maintain momentum for the Fair Share Amendment — which is expected to appear on the ballot in 2022 — and other priorities of the Raise Up Massachusetts coalition.

As it always has, the staff works closely with all other divisions on advancing MTA legislative, political and policy initiatives and providing guidance on strategic messaging, website creation and enhancement, social media posting, videography and other endeavors that call for creativity, urgency, and around-the-clock consultation with leaders and members, both statewide and local.

The division also remains involved in coalitions aside from Raise Up Massachusetts, including the Massachusetts Education Justice Alliance. The staff facilitates the work of a number of MTA committees, as well as administering the Public Relations/Organizing Campaign and The Massachusetts Child, an MTA charity.

The Communications staff uses many different approaches to ensure that the union's actions are well represented in both external and internal communications. The division continues to build the association's top-level digital presence on *massteacher.org* and help produce timely leadership emails. In the four annual issues of *MTA Today*, division writers, editors and photographers — as well as member contributors — shine a spotlight on crucial issues while making sure that diverse voices are represented.

In 2019-2020, as in past years, Communications has made major contributions to ensuring the success of the MTA. The division continues to adapt and innovate as it urges members on in maximizing their power and directing it toward ensuring that students and educators have access to the public schools, colleges and universities our communities deserve.

## FINANCE AND ACCOUNTING

The MTA's financial condition continues to be strong. Our June 30, 2019, audited financial statements show total net assets of \$37.4 million. The MTA's cash accounts and liquid reserves remain healthy, resulting from years of positive financial results, prudent pension funding and sound fiscal management.

To date, the U.S. Supreme Court's *Janus* decision has not adversely affected the MTA's financial condition. Membership totals and revenue are up from last year at this time. MTA leadership is advancing a 2020-2021 budget with projected membership increases over the fiscal 2019-2020 budget. While the future could bring some losses in membership, the increase in school funding statewide as a result of the enactment of the *Student Opportunity Act* is expected to provide offsetting growth.

The division continues to provide:

- Membership processing for approximately 116,000 members.
- Financial training and assistance to local associations in the following areas: financial management, membership processing, NEA membership database access, IRS payroll and annual tax reporting issues, data security, internal controls, and financial best practices.
- Internal financial accounting services, including financial reporting, budgeting, expense reporting, financial analysis, payroll, 401(k) and pension accounting, internal controls, accounting for other MTA entities, required annual IRS tax filings and filings for other entities, financial support for MTA governance and committees, and purchasing and travel administration.

## GOVERNANCE AND ADMINISTRATION

The division managed 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, and local and regional member forums. The division also coordinates the Massachusetts delegation's annual participation in the NEA Representative Assembly.

The division provides day-to-day assistance to MTA officers, the Executive Committee, the Board, member committees and local association leaders.

Key activities during the past year have included:

- 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 the Fund Our Future campaign.
- Leading the MTA's work in data collection for the Blueprint initiative.

## GOVERNMENT RELATIONS

The division works to strengthen the voices of MTA members in the political and legislative processes by linking educators with their elected officials on Beacon Hill.

In the past year, the division has worked to advance a number of critical policy initiatives and implement the MTA's legislative agenda — including Fund Our Future legislation. The agenda was developed through a process that included input from educators across the Commonwealth, ensuring that MTA-backed bills reflect the aspirations of members.

Over the course of the 2019-2020 session, the MTA has achieved several vitally important legislative successes, including passage of the *Student Opportunity Act* and the *Freedom to Join Act*, the latter of which provides key union protections in response to the U.S. Supreme Court's *Janus* decision. The division also played a key role in preventing the advancement of destructive policies, most notably a home rule petition that would have authorized a new and dangerous charter school expansion model in New Bedford.

In addition, the division was active in special elections. In collaboration with the MTA Candidate Recommendation Committee, the division organized interviews with candidates in a number of these races. The division is also working closely with the CRC to evaluate and recommend candidates for the fall 2020 state elections.

As the legislative session moves toward its closure this summer, the division continues to advocate strongly for passage of the elements of the MTA's legislative agenda. They include the increased funding for our public higher education campuses called for in the *Cherish Act*, along with other funding priorities and policies needed for the success of students, the empowerment of educators, the provision of paid family and medical leave benefits to ESPs and other municipal employees, protection of the financial security of retired public-sector employees, and the creation of safe, healthy and fair workplaces for all.

## GRASSROOTS CAMPAIGNS

The division plays a lead role in managing, coordinating and implementing the association's organizing, legislative and electoral campaigns and initiatives. Its work is carried out through the MTA's Legislative and Political Action Team program and driven by member-to-member engagement. The division also focuses on operational initiatives such as database management, campaign coordination, organizing action implementation, and event planning.

Over the past year, the division has led the MTA's Fund Our Future campaign work group, which has focused on passing legislation to increase funding for our public schools, colleges and universities.

Through the LPAT program, the division planned and executed a field effort for the preK-12 funding campaign that yielded more than 7,500 attendees at events, more than 5,000 conversations with members and supporters, more than

2,000 legislative outreach sessions, more than 100 lobbying meetings and more than 100 school committee resolutions supporting the Fund Our Future campaign. On Nov. 26, the hard work of members and our allies paid off with the signing of the *Student Opportunity Act*. The law provides a major infusion of new funding to our public schools, with projections showing that new Chapter 70 allocations will exceed \$2 billion a year in actual dollars by 2027.

The division's recent focus has been on the *Cherish Act*, the higher education funding portion of the FOF campaign. The division helped develop a campaign plan spanning the remainder of the legislative session. In addition, the division planned and executed events around the allocation of *Student Opportunity Act* funding and worked on special legislative elections. It is now engaging the membership in the 2020 election and working on the MTA's legislative priorities.

The LPAT program continues to grow, adding more local Political Action Leaders in 2019 than ever before. Throughout 2020, the division will continue to develop new LPAT teams across the state that work with MTA members on the issues that matter most to them.

## HIGHER EDUCATION

The division is committed to building rank-and-file power on state university, community college and UMass campuses. The staff works with locals on contract negotiation and enforcement, issue organizing, leadership development, strategy and advocacy. The following have been key areas of Higher Ed's work over the past year:

**Fund Our Future.** The division has taken the lead in coordinating *Cherish Act* campaign activities to reverse 20 years of dwindling funding for public higher education. Members and allies have testified at hearings, informed legislators in briefings and on a 29-campus tour, and led Fund Our Future community forums. Goals include winning economic gains and health care coverage, reversing staff cuts and the privatization of jobs, reinvesting in infrastructure, and ensuring affordability for students.

**Contract action.** All locals are in contract bargaining in 2020, with most agreements expiring on June 30. Beginning with the 2019 MTA Summer Conference, the division convened trainings to build contract campaigns and multi-union coalitions and to expand bargaining participation. Unifying issues include workload, equity and the need to restore or create more full-time jobs with benefits, and issues that are critical to ESPs. Newer issues include lifting up the voices of non-tenure-track faculty, the critical need for more library staff, and nursing school concerns. Bargaining over the implementation of the state's *Paid Family and Medical Leave Act* is continuing into full successor bargaining.

**Membership strength.** The *All In* initiative continues to be a high priority, requiring an intense focus on outreach to new hires and rapid responses to anti-union activities.

**Other critical issues:** College presidents on several campuses have faced no-confidence votes by faculty and staff. The division is developing a union-powered response to administrative bloat, early college initiatives, online learning, student loan debt, declining enrollments, and changing demographics.

## HUMAN RESOURCES

The Human Resources Division had a busy year, meeting the operational needs of the MTA in the areas of new employee recruitment and onboarding, benefits administration and employee relations. Highlights include:

- The hiring of 54 MTA Summer Member Organizers, 19 NEA Summer Organizers and five Parent Summer Organizers.
- The hiring of a diversity and inclusion consultant from the NEA to assist with MTA implementation of diversity, inclusion and racial justice initiatives.
- The successful promotion and launch of the employee Health and Wellness Program.
- Management of the MTA's Boston office reconfiguration.
- Staffing of the selection process for the new Executive Director-Treasurer.

## INFORMATION TECHNOLOGY SERVICES

The division has continued to provide and support systems that help the organization implement the Strategic Action Plan, as well as to meet the day-to-day technological needs of the staff.

This past year, the division completed an upgrading of the phone system, which will help to reduce maintenance and monthly recurring charges. It has begun working with other divisions to help automate workflows through the use of Office 365.

The division works in collaboration with all other MTA divisions to ensure that technological needs are being met and that the association is using its internal resources to the greatest extent possible. The division is also responsible for the implementation, support and maintenance of all major computer applications; more than 175 laptop and desktop computers; and all MTA printers, servers and internal and cellular telephone systems.

The work of the division makes possible the smooth operation of the technology systems that are woven through all parts of the organization and essential to ensuring maximum efficiency and productivity.

## LEGAL SERVICES

The Division of Legal Services continues to be a formidable and well-respected presence within the labor and education communities — recognized for robust advocacy, thorough preparation and legal work, and integrity. The MTA's Legal Services Policy provides affiliates and members with high-quality legal advice and representation in a wide array of areas and in many forums.

For example, the division represents the MTA's local and statewide affiliates in cases involving unfair labor practices, contract arbitrations, local corporate matters, health insurance disputes, and alleged breaches of the duty of fair representation. The division prepares written legal opinions for MTA affiliates and is available to provide direct legal advice to presidents when questions arise.

The division also represents individual members on a wide range of employment issues, including terminations, suspensions, licensure investigations by the Department of Elementary and Secondary Education and other licensing bodies, unemployment claims, retirement appeals, civil service issues, unlawful discrimination, wage claims, workers' compensation, whistle-blower retaliation, work-related criminal charges and investigations involving the state's child abuse reporting law. The division represents members from all types of bargaining units: college and university professors and kindergarten teachers, administrators and secretaries, department heads and paraprofessionals, cafeteria workers and bus drivers.

The division also provides legal guidance and representation to the MTA as a statewide entity on matters of legal significance. The division led the litigation team that filed a school funding lawsuit, *Mussotte v. Peyser*, to follow in the path of the landmark *McDuffy* and *Hancock* decisions. This effort played a large role in the passage of the *Student Opportunity Act*, which will increase preK-12 school funding by \$2 billion over seven years.

The division also litigated against the National Right to Work group in its effort to attack exclusive representation on constitutional grounds. The MTA prevailed before the state's highest court, and the U.S. Supreme Court denied the NRTW's petition for certiorari, leaving a very important win in the post-*Janus* era intact.

The division intervenes in or files amicus briefs in the appellate courts in cases of statewide significance. In addition, MTA attorneys help draft the MTA's public comments on numerous regulatory amendments by various state agencies, including, most recently, new regulations proposed by the Office of Campaign and Political Finance.

MTA attorneys — both in-house lawyers and outside counsel — litigate before the Massachusetts Supreme Judicial Court, the Appeals Court, the Superior Court, arbitrators, the Department of Labor Relations, the Division of Administrative Law Appeals, the Massachusetts Teachers' Retirement Board, and other legal forums. The division works with the MTA's other divisions — most closely with Affiliate Services and Higher Education, but also the Center for Education Policy and Practice and the Government Relations and Communications divisions.



The division includes the MTA's retirement consultation program. Every year, retirement consultants meet with members across the state on a one-to-one basis and in workshops, reaching more and more members every year.

## **MTA BENEFITS**

MTA Benefits celebrated its 50th year by adding 50 new discounts and benefit programs to its extensive list of member services.

The first wave came in July, when MTAB published its annual *Benefits & Discount Directory* with 42 new merchant offers in categories including museums, fitness, retail and recreation.

In 2019, MTAB had an unprecedented opportunity to extend its disability insurance plan to all MTA members during a special open-enrollment period from Nov. 15 through Dec. 31. The member response was overwhelming and led to the extension of the deadline. It became more clear than ever that members look to MTAB to provide benefits not offered by their locals. Rounding out its income-protection options was an accident insurance plan that was introduced during the special disability enrollment period.

Travel is always popular among MTA members, and to provide more choice in their planning, MTAB launched its Travel Savings Center, focusing on more than just vacations and offering deeper travel savings. New to the platform are Hotel Engine and HotelPlanner, which provide hundreds of hotel discounts and group event planning, respectively. The Access program also introduced its own travel portal, making it easy and fast to search for discounts on flights, hotels, rental cars and activities.

Continuing its mission of caring for the entire member experience, MTAB unveiled three additional programs: financial planning, mortgage services, and real estate benefits. Each program offers substantial member-only savings.

MTAB is honored to carry on its half-century tradition of bringing economic benefits to MTA members to help reduce the financial stress of their daily lives.

## **PRINTING AND MAILING**

The department printed over 6,000,000 impressions in calendar year 2019 to meet requests from all MTA divisions, locals, coalition partners and outside clients. Many of these requests were for various local associations, involving the printing of materials such as contracts, flyers, newsletters and postcards. The department continues to see an uptick in the usage of the wide-format printer for banners, large posters and signs.

One of the largest jobs that Printing and Mailing has taken on is the in-house production of membership materials. The department continues to refine this process to make it more efficient and cost effective.

The staff has continued to scan archived MTA documents. This work includes creating structured, searchable PDFs.

The staff also provided on-site support for numerous meetings, trainings, rallies and conferences.

The department continues to coordinate with all MTA divisions to keep the membership informed.

## **TRAINING AND PROFESSIONAL LEARNING**

Four major functions comprise the work of the division: professional development programming, union skills and leadership training, conference and meeting services, and grant writing and administration. The division has supported a wide array of training programs and conferences in the past year, including committee and division-hosted events such as the Early Career Educators Conference, the MTA Retired Gathering, the Ethnic Minority Affairs Committee Conference and the Higher Education Conference. The division plans other major training events as well, including the MTA Summer Conference. This is typically TPL's largest annual event, providing more than 100 workshops, special events and socials over four days at UMass Amherst.

Statewide professional development events included the third annual South Coast Education Summit, a conference focused on social and emotional learning that drew 415 participants. The division also supported professional development efforts on the local level and offered 25 two-day professional development courses across the state in which participants earned 12 to 15 EL and SPED PDPs. Demand is high for these events, and wait lists are common.

In the areas of union skills and leadership development, the division offered the Next Generation Leadership Program and the MTA Bargaining Summit, which was planned by a committee of members and staff in accordance with a 2018 Annual Meeting New Business Item. The third annual MTA Union Skills Winter Conference, which focused on workshops related to the core functions of local unions, was another success. The conference drew 464 participants – up from 416 in 2019 and 216 the first year it was offered.

The division responded to the Statewide ALANA-initiated racial justice reading group project by purchasing the first book, *White Fragility*. The book was utilized by several locals and launched the formation of four statewide reading hubs totaling approximately 75 to 100 members.

TPL also sponsored trainings on racial justice, student behavior, popular education, and health and safety protections under the new public-sector OSHA law. In addition, the division has provided direct training support to locals and made significant revisions to standard training materials to adjust to the post-*Janus* landscape. These materials are used by field staff across the state.

Also during the year, the division wrapped up several programs with the support of NEA grants, including trainings related to safe schools and restorative disciplinary practices. These grants were concluded with an “exemplary” status rating from the NEA.

The division’s MTASO staff provides significant logistical support for many other MTA events, including the Annual Meeting of Delegates, presidents’ meetings, member forums, the NEA Representative Assembly, MTA Board and committee meetings, and numerous internal meetings.