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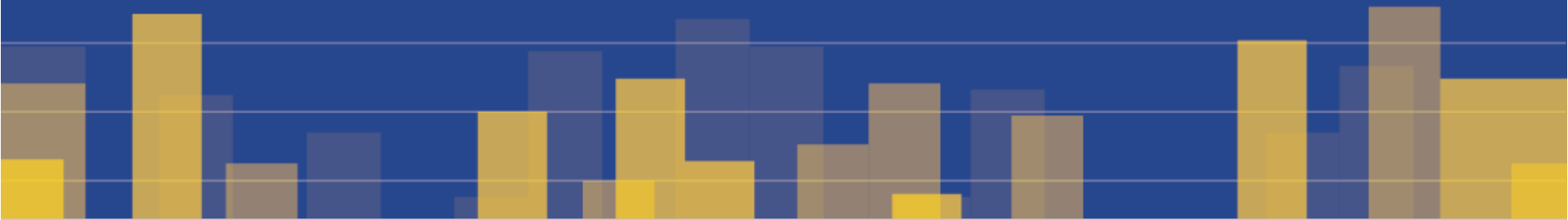


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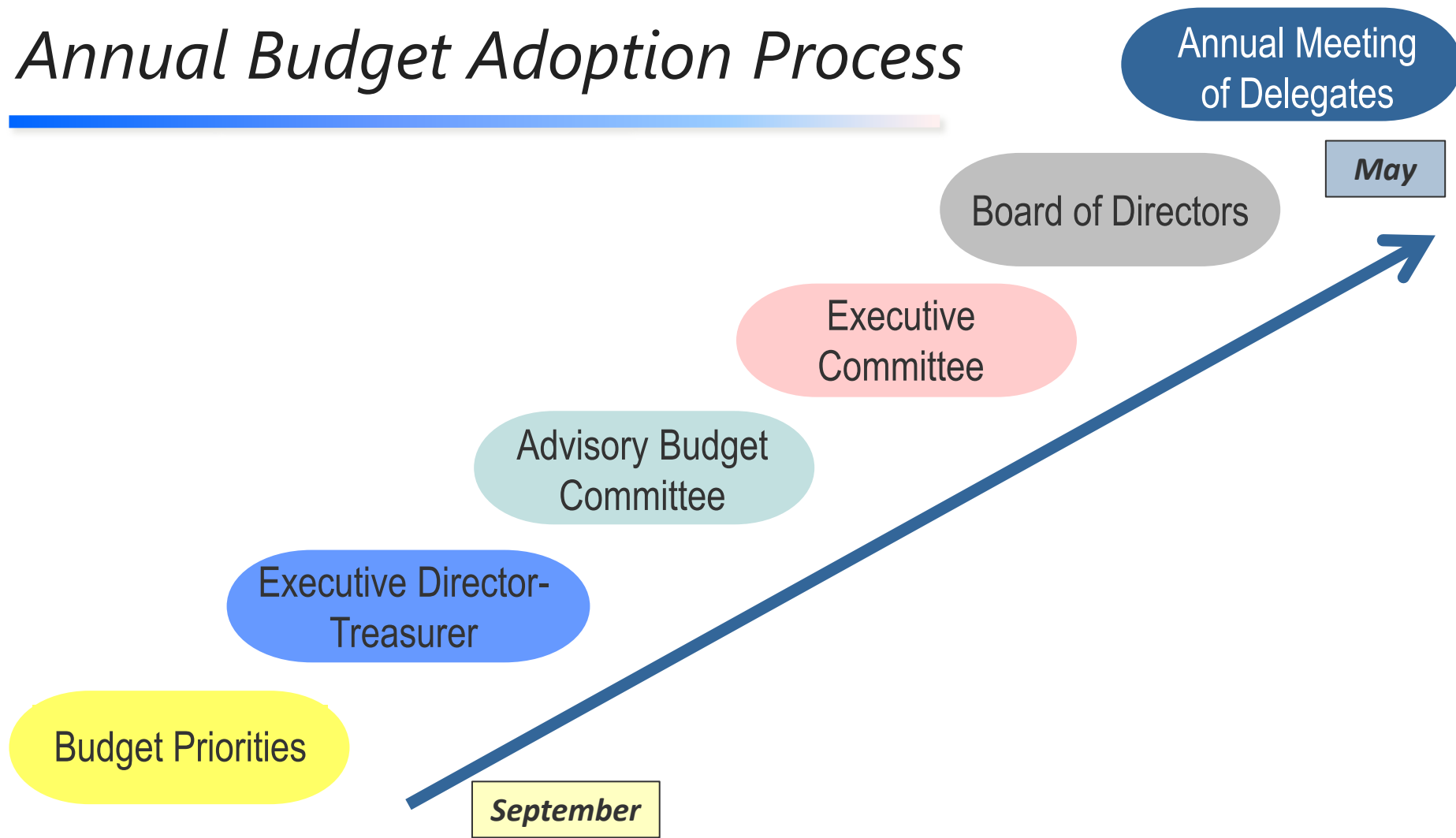


COLLECTIVE POWER

PROPOSED 2023-24 BUDGET
MASSACHUSETTS TEACHERS ASSOCIATION



Annual Budget Adoption Process



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OPERATING BUDGET



Membership Highlights- Total Members

Dates

Members

June 30, 2020

117,665

June 30, 2021

114,434

June 30, 2022

116,244

March 31, 2023

116,907

Membership Highlights- Full Time Equivalents (FTEs)

<u>Dates:</u>	<u>FTEs</u>
June 30, 2020	89,214
June 30, 2021	87,738
June 30, 2022	89,187
Membership on which FY23 budget is based:	89,506
<i>Actual FTE's, as of March 31, 2023</i>	90,664
<u>Membership on which FY24 will be based:</u>	91,110

2023-2024 Operating Budget Recommendation

Annual operating budget	\$52,221,525
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Full-time equivalent active members	91,110
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Dues:

- | | |
|--|-------|
| ■ Baseline dues (\$20 increase) | \$503 |
| ■ Clerical staff and custodians (\$12 increase) | \$302 |
| ■ Paraeducators, food service personnel and other education support professionals (\$6 increase) | \$151 |
| ■ Annual Retiree Dues | \$ 30 |

Revenue Increases - 2023-2024 vs. 2022-2023

Budgeted Membership FTE (91,110 FY24 vs 89,506 FY23)	1,604	↑
Membership Dues Revenue	\$ 2,596,943	↑
Operating Revenue % Increase	4.3%	↑

Expense Increases - 2023-2024 vs. 2022-2023

- Increase in Pension (line 6, pg. 51) – projected contribution increased based on Mercer actuarial calculation of funding status (+183,143)
- Increase in Health & Dental Insurance (line 7, pg. 52) – assumes a 9% rate increase in health and a 6% increase in dental, as advised by Boston Benefit Partners, MTA's benefits consultant (+\$358,023)
- Increase in Summer Conference (line 41, pg. 64) due to inflation and the pandemic impact on the hospitality industry. (+\$119,402)
- Increase in Contingency (line 111, pg. 93) – driven by employee raises that will be negotiated for three expiring staff union contracts (+\$509,046)
- Increased Campaign Capacity (line 113, pg. 94) – driven by additional dues increase of \$13 recommended by BOD to enable investment in staff capacity to continue winning major statewide policy and legislative campaigns (+\$1,184,430)

Expense Decreases - 2023-2024 vs. 2022-2023

- Wages (line 2, pg. 50) – returns the Summer Member Organizer program to its focus on signing up potential members without a ballot initiative campaign (-\$327,666)
- Investment Consulting Fees (line 15, pg. 54) –new investor advisor has slightly lower fees, some of which are netted with our holdings (-\$220,336)
- Member to Member/Elections (line 53, pg. 70) – grants already awarded from PR/O and NEA will cover Grassroots campaign expenses (-\$75,000)
- Property Casualty Advertising Fees (line 103, pg. 90) – decrease due to loss of revenue generated from new contract with Hanover (-\$59,000)
- Depreciation (line 110, pg. 92) – decrease reflects reduction related to buildout which was paid for with building sale proceeds (-\$100,000)

2023-2024 Proposed Dues Increase

Baseline Dues Increase

- Maintain *current* staffing and programming \$7
- Invest in support for: \$13
 - Statewide campaigns
 - Fair Share of the Fair Share for public higher ed and PreK12
 - End high stakes testing regime
 - ESP Living Wage and Bill of Rights
 - Local contract campaigns

Total Dues Increases

- Baseline dues: \$20/year
- Dues for clerical staff and custodians: \$12/year
- Dues for paraeducators, food service personnel and other education support professional: \$6/year

Dues are lower in inflation adjusted dollars than any time in the past 30 years, other than last year (when there was a zero increase in dues).

Where is staff capacity most needed?

Blueprint Process: March to June 2023

- Update Local Needs Assessment
- Form Labor/Management Working Group
- Executive Committee deliberates and votes
- Board votes to create new positions
- Commit to prioritize sign-up of potential members

CONTRACT CAMPAIGNS IN MOTION!

Quincy:

- Increased starting pay
- \$650 on each step at top MA level
- Competitive compensation for retaining educators
- Parental Leave
- Prep-time!



Brookline:

- Additional 6-8% wage increase
- Support to retain educators from underrepresented groups
- Prep time autonomy



Malden:

- Year 1 all ESPs minimum of \$30k (up from \$22k) & average 24% increase in year 1 for all ESPs
- 10% raise for all Unit A/B educators & an additional 3% on the top step in year 2 for Unit A
- Two one-time payments of \$1,000 for educators
- Paid parental leave for all educators
- Tuition reimbursement for all educators
- Housing justice for families



Haverhill:

- \$10K-\$12K raises for all
- Sped caseload caps
- Scholarship for Haverhill grads to become teachers

Woburn:

- Year 3 - all paras minimum of 30k (up from 22k!)
- Roughly 14% raise over 4 years
- More Prep-time/ lower class size
- Improvements - recruit & retain



Melrose:

- 20% raises for ESPs
- 10% raises over 3 years for teachers
- More prep time for all



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OPERATING BUDGET - QUESTIONS?



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PUBLIC RELATIONS & ORGANIZING BUDGET

PR&O Spending Initiatives

- Fair Share Amendment campaign
- ESP leadership development program
- Project to develop alternatives to high-stakes testing
- Ongoing coalition and issue advocacy
- Public television presence with *As Schools Match Wits* and *High School Quiz Show*
- Organizing grants to locals

2023-2024 PR & O Budget Recommendation

PR & O Budget
(based on 91,110 members)

\$1,822,200

NO DUES INCREASE

- PR & O baseline dues remain at: \$20
- Clerical staff and custodians dues remain at: \$12
- Paraeducators, food service personnel and other education support professionals remain at: \$ 6

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PR & 0 BUDGET - QUESTIONS?

Proposed FY24 Membership Dues Summary

	Baseline dues	Clerical staff and Custodians	Paraeducators, Food Service Personnel, Other ESP's
Operating Dues	\$503	\$302	\$151
PR & O Dues	\$20	\$12	\$6
Total Dues	\$523	\$314	\$157

Advisory Budget Committee

Deb McCarthy, Vice President and Chair

Max Page, President and Member Ex-Officio

Cynthia Roy, Bristol-Plymouth

Cedric Cunningham, Springfield

Andrei Joseph, Statewide Retired

Naomi Akan, Canton

Kerri Scott, Melrose

Sarah McLaughlin, Melrose

Joanna Gonsalves, MSCA

Lisa Gallatin, Executive Director-Treasurer

Beth Evers, Chief Financial Officer

Ann Maguire, Controller

Nancy Shukan, Financial Reporting Accountant

Board Motion – Proposed Operating Budget:

To recommend to the MTA Annual Meeting of Delegates the adoption of the annual operating budget of \$52,221,525 and an operating budget dues level of \$503, based on 91,110 full-time equivalent active members for the 2023-2024 fiscal year. Dues for clerical staff and custodians are to be \$302, dues for paraeducators, food service personnel and other education support professionals are to be \$151. Annual retiree dues remain at \$30.

Board Motion – Proposed PR&O Budget:

To recommend to the MTA Annual Meeting of Delegates the adoption of the Public Relations/Organizing Campaign budget of \$1,822,200 and a Public Relations/Organizing Campaign dues level of \$20, based on 91,110 full-time equivalent active members for the 2023-2024 fiscal year. Dues for clerical staff and custodians are to be \$12, dues for paraeducators, food service personnel and other education support professionals are to be \$6.