



**MTA Board of Directors**  
**March 28-29, 2025**  
Doubletree Westborough  
5400 Computer Drive, Westborough, MA 01581  
**Schedule of Events**

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**FRIDAY, March 28, 2025**

4:00 p.m. – 5:00 p.m.	Optional Budget Q&A	Nugget
5:00 p.m. – 6:00 p.m.	Dinner	Chandler/Edgewood
6:00 p.m. – 9:00 p.m.	Business Session	Viking/Autumn/Baldwin

**SATURDAY, March 29, 2025**

8:00 a.m. – 10:00 a.m.	Breakfast	Chandler
9:00 a.m. – 10:00 a.m.	Dismantling Systems of Oppression Board Education Program	Edgewood
10:00 a.m. – 1:00 p.m.	Business Session	Viking/Autumn/Baldwin
1:00 p.m. – 2:00 p.m.	Lunch	Chandler/Edgewood
2:00 p.m. – 5:00 p.m.	Business Session	Viking/Autumn/Baldwin

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***Please forward any pertinent questions to Max Page before the meeting so up-to-date information may be provided.***

Network: Hilton Honors Meeting  
Passcode: 20honor

**MTA BOARD OF DIRECTORS AGENDA**  
**March 28-29, 2025**  
**5400 Computer Drive, Westborough, MA 01581**

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1. Call to Order (6:00 p.m.)
2. Roll Call (5 minutes)
3. Land and Member Acknowledgement (20 minutes)
4. Act on the Adoption of the Order of Business (5 minutes)
5. Consent Agenda (At Least One Vote Required to Adopt ALL) (10 minutes)
  - a. Act on Approval of the Board of Directors Minutes of February 7-8, 2025
  - b. Act on Approval of the Special Board of Directors Minutes of March 6, 2025
6. Consent Agenda (Vote NOT Required. Read Written Reports in Advance) (10 minutes):  
***Please forward any pertinent questions to Max Page before the meeting so up-to-date information may be provided.***
  - a. Financial Report of the Treasurer (FY 2024-2025)
    1. Financial Overview
    2. Comparative Statement of Financial Position and Balance Sheet Analysis
    3. Comparative Summary Statement of Operations and Analysis
    4. Detail Statement of Operations
    5. Comparative Analysis of Membership Totals
    6. Report on MTA/NEA Membership
    7. Contingency Report
    8. Fiscal Year 990 Tax Return
  - b. Field and Organizing Report (prek-12 & Higher Ed)
  - c. Public Relations/Organizing Campaign Expense Report
  - d. Status of Donations Account
  - e. MTAB Financials
  - f. Legislation, Policy, and Political Action Report
  - g. Training & Professional Learning (TPL) Report
  - h. Legal Report
7. Discussion and VOTE: 2026-2027 Governance Calendar – Jennifer Freeling, Director of Governance (10 minutes)
8. Blueprint Update: Communications Division – Amanda Torres-Price, Director of Communications (15 minutes)
9. Annual Report: MTA Retirement Plan Committee – Anne Wass, Chair (15 minutes)
  - a. Investment Portfolio of MTA Employees Retirement Plan (per Policy 95.50.03)

10. Presentation and Discussion: Wages and Living Conditions of Faculty and Staff at Public Higher Education Institutions in Massachusetts – Vishaka Agarwal, Education Research and Policy Specialist, and Noah Berger, Director of Legislation, Policy and Political Action (20 minutes)
11. Legislative and Campaign Updates – Noah Berger, Director of Legislation, Policy and Political Action (30 minutes)
12. Discussion: Potential 2026 Ballot Initiatives and Decision Points (30 minutes)
13. Discussion and VOTE: Local Office Support Task Force Policy Review (second read) (40 minutes)
  - a. Act on Recommendation of the Local Office Support Task Force to recommend the proposed Policy to the 2025 Annual Meeting of Delegates.

~end of Friday night session~

14. Recognition of Guest Speakers (up to 30 minutes)
15. Discussion: Current Political Landscape (45 minutes)
16. MTA Policies (30 minutes)
  - a. New Policy – Add 10.60 to Policy 10. Distribution of Materials at Annual Meeting
  - b. Amend Policy 10.55 Annual Meeting Preconvention Meetings (second read)
  - c. Amend Policy #180.30.10 Salary of the President and Vice President (second read)
  - d. Proposed New Policy – Acceptable Use Policy (second read)
  - e. Proposed New Policy #165 National Education Association – NEA Resolutions Committee (second read)
  - f. New Policy 20.25.15 Guest Speaker and Observer Norms (second read)
  - g. Amend 20.05.14 Guest Speaker Recognition Procedure (second read)
  - h. Amend 20.25.17 Guidelines for Streamlining and Conduct of Board Meetings (second read)
  - i. PST Rotation
17. Act on proposed amendments to the *MTA Bylaws and Standing Rules* for recommendation to the 2025 Annual Meeting of Delegates – Jackie Gorrie, *Chair of the MTA Bylaws and Rules Committee* (20 minutes)
18. Act on proposed amendments to the *MTA Resolutions* for recommendation to the 2025 Annual Meeting of Delegates – Deb Gesualdo, *Chair of the MTA Resolutions Committee* (20 minutes)
19. Receive a report on the recommendation of the Electoral Review Committee for the proposed MTA Electoral District and Region Plan for action by the 2025 Annual Meeting of Delegates – Brian Fitzgerald, *Chair, Electoral Review Committee*.

~lunch~

20. Review and Discussion of the Preliminary Budget for 2025-2026, as Recommended by the Executive Committee – Deb McCarthy, *Vice President* (15 minutes)
21. Act on a Recommendation from the Executive Committee: Adoption of the Preliminary Operating Budget and Dues Level for 2025-2026 for Recommendation to the 2025 Annual Meeting of Delegates (30 minutes)
22. Act on a Recommendation from the Executive Committee: Adoption of the Preliminary Public Relations/Organizing Campaign Budget and Dues Level for 2025-2026 for Recommendation to the 2025 Annual Meeting of Delegates (15 minutes)
23. Executive Session - Confidential \* (30 minutes)
  - a. Personnel Update
  - b. Labor Relations report
  - c. Act on the Recommendation of the Executive Committee for Approval of the Recipient of the 2025 MTA Friend of Education Award
  - d. Act on the Recommendation of the Executive Committee for Approval of the Recipient of the 2025 MTA Friend of Labor Award
  - e. Act on the Recommendation of the President for Approval of the Recipient of the 2025 MTA Presidents Award
24. Board of Directors At-Large Reports (15 minutes)
  - a. ESP Members: Yahaira Rodriguez, *At-Large ESP Executive Committee member* and Holly Currier, *At-Large Director for ESPs*.
  - b. Ethnic Minority Members: Elizabeth Tyrell, *At-Large Ethnic Minority Executive Committee member*, and Rosa Lopez Whitehill, *At-Large Director for Ethnic Minority Membership*.
  - c. Retired Members: Andrei Joseph, *Statewide Retired Region Executive Committee member* and Kip Fonsh & Joe Herosy, *Statewide Retired District Directors*.
  - d. NEA Director Report: Christine Mulrone, *NEA Director*
25. Unfinished Business
26. New Business (Deadline: Friday, March 14, 2025) (30 minutes)
  - a. 2025.03.28-29.2025 NBI01 Support for death of member.
  - b. 2025.03.28-29.2025 NBI02 Secure email to MTA Board
  - c. 2025.03.28-29.2025 NBI03 Task Force for MTA webpage “Resources on the Conflict in the Middle East”
  - d. 2025.03.28-29.2025 NBI04 BOD Working Group to review MTA Resources on Isreal and Occupied Palestine
27. Leadership Reports\* (10 minutes)
  - a. Report of the President
  - b. Report of the Vice President
  - c. Report of the Executive Director-Treasurer

## 28. Adjournment

- Appendix A: 2025 Annual Meeting of Delegates – Business Session Agenda
- Appendix B: 2025 Annual Meeting of Delegates – Schedule of Events
- Appendix C: February 7-8, 2025, Board Mtg Actions Taken
- Appendix D: March 6, 2025, Special Board Mtg Actions Taken
- Appendix E: 2024-2025 Governance Calendar
- Appendix F: 2025-2026 Governance Calendar

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The asterisks identify items to be sent in advance under separate cover or distributed as handouts at the meeting.

To be recorded as excused from attendance at Board members must send email to MTA Governance, in advance of the meeting with the reason for non-attendance: [MTAGovernance@massteacher.org](mailto:MTAGovernance@massteacher.org). The *MTA Bylaws* stipulate: *The position of district director shall be declared vacant in the event a member is absent from two consecutive Board meetings without prior notice.*

**Guest Speaker Recognition Procedure (Policy No. 20.05.14)**

*At regular meetings of the Board of Directors, a 30-minute period, prior to Action Items, will be available for members (in the audience) to address the Board on specific agenda items or other issues that are of concern.*

*Persons wishing to make comments will register with the Vice President prior to the start of the meeting. Speakers will be heard in the order in which they are registered.*

*Depending on the number of persons registered, speakers may be asked to limit their remarks in order to hear as many as possible within the time allowed.*

*If no speakers are registered, the Order of Business as adopted will continue.*

*A copy of the policy will be mailed with the Board Agenda to those who receive that agenda. The procedure will be explained at the commencement of each Board meeting.*

*This policy may be waived by a majority vote of the Board of Directors.*

cc: MTA Local Presidents  
MTA Committee Chairs  
MTA Presidents and Secretaries of FSO, MATA, MTASO  
MTA Staff



## 2026-2027 MTA Governance Calendar

Executive Committee Meetings	Board of Directors Meetings
EC Retreat Dates: Wednesday-Friday, July 15-17, 2026 Location: MTA Headquarters, Quincy	New BOD Orientation, Retreat and Meeting Dates: Friday-Sunday, July 24-26, 2026 Location: UMASS Amherst
Friday, September 18, 2026 Location: <i>*collocated with All Presidents Meeting</i>	Friday/Saturday, October 16-17, 2026 Location:
Friday, November 6, 2026 Location: TBD	Saturday, December 11-12, 2026 Location: TBD
Friday, January 15, 2027 Location: TBD	Friday/Saturday, February 5-6, 2027 Location: TBD
Friday, February 26, 2027 Location: TBD	Friday/Saturday, March 26-27, 2027 Location: TBD
<b>2027 Annual Meeting of Delegates, Hynes Convention Center, Boston, MA</b> May 14-15, 2027	
Friday, June 4, 2027 Location: MTA Headquarters, Quincy	Friday/Saturday, June 11-12, 2027 Location: TBD

*New Board Orientation*..... July 24, 2026  
*All Presidents' Meeting*.....September 19, 2026  
*Ethnically Marginalized Affairs Committee Conference*..... December 3-4, 2026  
*All Presidents Meeting collocated with Union Skills* .....January 22-23, 2027 OR January 29-30, 2027  
*Early Career Educators Conference* ..... TBD  
*ESP Conference* ..... April 2-3, 2027 OR April 9-10, 2027  
*2027 NEA Representative Assembly, Indianapolis, IN* .....July 1-July 5, 2027

# Local Support Policy Proposal

140.50 MTA Local Support Program

## PURPOSE

To help associations defray part of the cost of operating local associations.

## RULES FOR OPERATION

1. Locals are encouraged to maintain an updated record of these expenses and, when requested, communicate this record to the MTA. Each local association, or each group of local associations, requesting MTA support shall make available to MTA all of the following documents ~~a record of expenses for the current fiscal year in the categories for which support is requested.~~

- a. Local Dues & Audit Certificate
- b. Most Recent 990 Tax Form
- c. Most Recent 150E Forms 1 and 2
- d. Full unit lists of all staff of the local's employer eligible to enroll in the local association

~~b.e. For expenses submitted in excess of \$100, receipts or other supporting documentation should be maintained by local associations and made available to MTA upon request. In addition to the Audit Certificate that is required to be filed by September 15, all locals requesting support should also submit a quarterly Income Statement (Financial Statement showing Incomes and Expenses) for the quarter just ended.~~

~~2. Categories of support are limited to the following:~~

- ~~● OFFICE EXPENSES: rent, telephone, utilities, equipment, office supplies, postage, printing, insurance, paper, clerical services, payroll taxes, disability costs associated with but not limited to CART services and interpreting, technology services, including ZOOM and other electronic services, and audit costs.~~
- ~~● COMPENSATION: local officers, committee chairs and committee members.~~
- ~~● CONFERENCES: registration fees at MTA approved conferences and hotel room costs for MTA Annual Meeting, EMAC Conference, MTA Winter Skills and Bargaining Summit, MTA Early Career Educator Conference, MTA ESP Conference and MTA Summer Conference (as advertised by MTA).~~

A) ~~A) The intention of the Local Support Program is to provide financial support for~~

2. The intention of the Local Support Program is to provide financial support for office expenses, officer compensation, and MTA Conferences that cultivate labor organizing and social justice.

3. The MTA and the local association, or the group of local associations, shall enter into a written agreement covering the categories of support and the association(s) shall annually certify that the financial statements have been audited or reviewed.
4.
  - ~~\_\_\_\_\_~~ The local association shall submit **applications** requests for reimbursement ~~on an annual~~ quarterly basis and shall certify the amount of local dues for the succeeding fiscal year on or before ~~December~~ **November** ~~September 31st~~ **15th**.
    - ~~The due date of the final local office support fiscal year reporting should be postmarked or received by the first business day after July 15 of the appropriate year.~~
5. Members and potential members ~~or agency fee payers~~ should be reported on a full-time equivalent basis in accordance with the percentage of MTA's active dues paid. Such reports should be acquired through 150e information requests **by December 1** ~~in the months of October and May~~. The Division of Field and Organizing will provide a sample template.
6. ~~Maximum Reimbursements should be calculated based on full-time equivalents.~~
6. **Local support will be calculated based on Full-time equivalents.**
- 6.7 The amount of local support shall be based on the current year's membership **as of December 31st and the previous year's in-person delegate attendance at Annual Meeting.**
- 7.8. In future appeals, the local association President, the Executive Committee member, and the Board member who represent the local will be notified that an appeal for late-filed Local ~~Office~~ Support has been filed and that their presence at the appeal is

## FUNDING

Local associations **submitting documentation by the stated deadline will receive no less than \$17 per FTE and an additional \$400 for each elected local association delegate who attended the previous year's annual meeting in-person. The Board of Directors may increase this entitlement annually as needed, however such an increase shall not be precedent setting.** ~~for 50% of the qualifying expenses incurred up to the maximums set forth in the following reimbursement schedules.~~

### **100% OF ACTIVE MTA DUES**

#### **LOCAL DUES..... REIMBURSEMENT**

Less than \$30 .....	\$5.00 per member or agency fee payers
\$30-44.99 .....	\$10.00 per member or agency fee payers
\$45-59.99 .....	\$15.00 per member or agency fee payers
\$60-79.99 .....	\$20.00 per member or agency fee payers
*\$80 or more .....	\$25.00 per member or agency fee payers (effective 1998-99)

**60% OF ACTIVE MTA DUES**

**LOCAL DUES..... REIMBURSEMENT**

Less than \$18 .....	\$3.00 per member or agency fee payers
\$18-26.99 .....	\$6.00 per member or agency fee payers
<del>\$27-35.99 .....</del>	<del>\$9.00 per member or agency fee payers</del>
\$36 or more .....	\$12.00 per member or agency fee payers
\$48 or more .....	\$15.00 per member or agency fee payers

**30% OF ACTIVE MTA DUES**

**LOCAL DUES..... REIMBURSEMENT**

Less than \$9 .....	\$2.00 per member or agency fee payers
\$9-13.49 .....	\$3.00 per member or agency fee payers
\$13.50-17.99 .....	\$5.00 per member or agency fee payers
\$18 or more .....	\$7.00 per member or agency fee payers
\$24 or more .....	\$8.00 per member or agency fee payers

- \* The change in the policy which was adopted May 1997 shall be effective in FY 1998-99; all local associations will be notified of the change in the policy before the effective date.
- Members should be categorized according to the schedule for the percentage of MTA active dues or agency fee paid when Local Association Support worksheets are prepared.
  - The amount of funding provided to each local shall be reduced proportionately if less than the total amount of projected program costs, as requested in the proposed budget, is included in the budget adopted by the Annual Meeting of Delegates.
  - Local support payments shall be paid to local associations only if dues payments are remitted in accordance with the MTA Bylaws, Article IV, Section 3.

Executive Committee: May 1974

Amended: November 1974

Amended: March 1979, April 1984, August 1984

Amended: June 1989 (Board of Directors)

Amended: November 1989, March 1990, May 1997, September 2005, November 2014, August 2023

Add new section to Policy 10. Section 10.60 Distribution of Materials and Sign-Holding

- Guests are not permitted to distribute any materials or hold any signs at Annual Meeting of Delegates, except in the case of approved exhibitors.
- Members, including delegates and non-delegates, may distribute flyers outside of the business session.
- No sign-holding will be permitted either in the business hall or any external areas like registration, exhibit hall, etc., except in the case of Candidate Campaigning.
- Any questions and complaints about this policy should be directed to the following people: Director of Governance, Sargeant at Arms, or the Chair of the Credentials and Ballot Committee.

## Proposed Policy Change

### ***Policy 10. ANNUAL MEETING OF DELEGATES***

#### ***10.55 Preconvention Meetings***

The Annual Meeting Preconvention meetings shall be held as virtual meetings (online, via Zoom), with a minimum of two Preconvention meetings held. ~~concept shall be changed from six (6) preconventions (Cape and Islands, Central, Metro, Northeast, Southeast, Western-Berkshire) to five (5) preconventions (Cape and Islands, Central, Northeast, Southeast, and West).~~

# **Proposed Policy Change to #180.30.10 Salary of the President and the Vice President**

## **EXISTING LANGUAGE: 180.30.10 Salary of the President and the Vice President**

The salary year for the President and Vice President shall be July 15 through July 14 of the following year.

The salary of the President shall be 3.0 times the Massachusetts average salary of classroom teachers in the public elementary and secondary schools (rounded to the nearest dollar). The salary of the Vice President shall be 2.5 times the Massachusetts average salary of classroom teachers in the public elementary and secondary schools (rounded to the nearest dollar). The computation shall be based on salary data for the prior year as determined by the reports of the Massachusetts Department of Elementary and Secondary Education.

Effective July 15, 2016, the annual salary will be based on the salary paid to the President and Vice President in the previous year. In the event that the salary of the President becomes greater than 3.0 times the Massachusetts average salary of classroom teachers in the elementary and secondary schools (rounded to the nearest dollar) and/or the salary of the Vice President becomes greater than 2.5 times this measure, the following two conditions will apply until such time as the salary is less than or equal to the above calculation:

- If the Massachusetts average salary of classroom teachers in the public elementary and secondary schools remains the same or decreases in any year, the salary of the President and Vice President will be level-funded for the next year.
- If the average salary of classroom teachers in the public elementary and secondary schools increases in any year, the salary of the President and Vice President will increase by 0.5% (rounded to the nearest dollar), for the next year.

The method of computing the President's and Vice President's salary and the salary rate shall be reviewed every three years by an ad hoc committee of five members elected by the Board of Directors. The committee shall elect its own Chair.

## **PROPOSED LANGUAGE: 180.30.10 Salary of the President and the Vice President**

The salary year for the President and Vice President shall be July 15 through July 14 of the following year. The salary of the President shall be \$268,728. The salary of the Vice President shall be \$223,940. The President's and Vice President's salary shall be reviewed in 2027 and every three years thereafter at least 6 months prior to the end of the fiscal year by an ad hoc committee of five members elected by the Board of Directors. The committee shall elect its own Chair.

# **IT RESOURCES AND COMMUNICATIONS SYSTEMS POLICY FOR NON-EMPLOYEE USERS**

Massachusetts Teachers Association's (MTA) computers, networks, communications systems, and other information technology (IT) resources are intended for business purposes only to assist non-employees with the performance of their duties as leaders of the Massachusetts Teachers Association. To protect the MTA and its board of directors, it is the MTA's policy to restrict the use of all IT resources and communications systems as described below. Each user is responsible for using these resources and systems in a productive, ethical, and lawful manner and in a manner in compliance with the MTA Board Policy and MTA Bylaws.

The MTA's policies prohibiting harassment, namely Policy 175.110 - Workplace Equity Committee Policy, and all other applicable policies apply to the use of the MTA's IT resources and communications systems. No one may use any communications or computer system in a manner that may be construed by others as harassing or offensive based on race, national origin, sex, sexual orientation, age, disability, religious beliefs, or any other characteristic protected by federal, state, or local law or MTA Board Policy or Bylaws.

The use of MTA's IT resources and communications systems by a non-employee or board member shall signify their understanding of and agreement to the terms and conditions of this policy, as a condition of their service to the MTA in whatever non-employee capacity they may have.

## **Administration of This Policy**

The Division of Governance is responsible for the administration of this policy. If you have any questions regarding this policy, please contact the Director of Governance and/or their designated division member.

## **Security, Access, and Passwords**

Security of MTA's IT resources and communications systems is the responsibility of Information Technology Services (ITS), including approval and control of non-employees' and others' access to systems and suspension or termination of access in cases of misuse and when a user is no longer eligible to use the systems.

It is the responsibility of each non-employee user under this policy to adhere to ITS security guidelines, including but not limited to the creation, format, and scheduled changes of passwords. All usernames, pass codes, passwords, and information used or stored on the MTA's computers, networks, and systems are the property of MTA.

No non-employee user shall share usernames, pass codes, or passwords with any other person. A user shall immediately inform the IT Department if they know or suspect that any username, pass code, or password has been improperly shared or used, or that IT security has been violated in any way.

All users will be required to utilize Multi-factor Authentication (MFA) and will need to install an application on their cell phone in order to enter the codes into the service.

All users will need to complete an initial online security awareness training, and bi-annually thereafter. Periodically users will receive "test" phishing emails and enroll in training if they open attachments or click on links in such tests.

**Resources and Systems Covered by This Policy.** This policy governs all IT resources and communications systems owned by or available at MTA, and all use of such resources and systems when accessed using a non-employee user's own resource, including but not limited to:

- Email systems and accounts.

**No Expectation of Privacy.** All contents of the MTA's IT resources and communications systems are the property of the MTA. Therefore, non-employee users should have no expectation of privacy whatsoever in any message, file, data, document or any other kind or form of information or communication transmitted to, received, or printed from, or stored or recorded on the MTA's electronic information and communications systems.

You are expressly advised that to prevent misuse, **MTA reserves the right to monitor, intercept, and review, without further notice, every user's activity using the MTA's IT resources and communications systems.**

The MTA may also store copies of such data and communications for a period of time after they are created and may delete such copies from time to time without notice.

Do not use the MTA's IT resources and communications systems for any matter that you desire to be kept private or confidential from the MTA.

**Network Systems.** MTA maintains integrated computer and data communications networks to facilitate all aspects of its business. You may never sign-on to any network equipment using the password or username of another user, whether they be an employee or non-employee. No non-employee users should access, attempt to access, alter, or delete any network document except in furtherance of authorized MTA business.

**Downloading and Installing Software/Website Agreements.** Email and downloading from the internet are prime sources of viruses and other malicious software. Therefore, users should avoid downloading or installing any software or shareware to their hard drive or personal device that is not expressly authorized or approved by the IT Department. In addition, non-employee users should not accept the terms or conditions of website agreements without first obtaining approval from the Director of the Division of IT Services in order to avoid infecting their own computer should there be a breach of some kind. The MTA is not responsible for problems that may arise due to downloading viruses or other malicious software or spyware on user's private computers.

### **Confidentiality and Proprietary Rights**

MTA's confidential information and intellectual property (including trade secrets) are extremely valuable to MTA. Treat them accordingly and do not jeopardize them through

your business or personal use of electronic communications systems, including email. Disclosure of the MTA's confidential information to anyone outside MTA and use of the MTA's intellectual property is subject to the MTA's Board Policy and Bylaws. Ask the Division of Governance if you are unsure whether to disclose confidential information to individuals or how to safeguard the MTA's proprietary rights.

Do not use MTA's name, brand names, logos, taglines, slogans, or other trademarks without written permission from the MTA Division of Governance. This is also in accordance with MTA BOD policy and Bylaws.

This policy also prohibits use of the MTA's IT resources and communications systems in any manner that would infringe on or violate the proprietary rights of third parties. Electronic communications systems provide easy access to vast amounts of information, including material that is protected by copyright, trademark, patent, and/or trade secret law. You should not knowingly use or distribute any such material downloaded from the internet or received by email without the prior written permission of the Division of IT Services.

### **Spam and Email Etiquette**

MTA provides certain non-employee users with access to email for use in connection with performing their BOD or other leadership duties. MTA seeks to provide stable and secure email with rapid, consistent delivery times that promote communication for business purposes without incurring unnecessary costs or generating messages that are unproductive for the recipient. Many of the policies described below governing use of the MTA's email systems are aimed at reducing the overall volume of messages flowing through and stored on the network, reducing the size of individual messages, and making the system more efficient and secure.

**Spam.** Unfortunately, non-employee users of email and text messaging will occasionally receive unsolicited commercial or bulk messages (spam) which, aside from being a nuisance and a drain on IT resources, might be a means to spread computer viruses and other malicious software. Avoid opening unsolicited messages and report any suspicious messages to the administrator. Delete all spam immediately. Do not reply to the message in any way, even if it states that you can request to be removed from its distribution list. If delivery persists, contact the email administrator who will block any incoming messages from that address.

Non-employee users should be aware that spammers have the ability to access email addresses that are listed as senders or recipients on email messages, on websites, user discussion groups, and other internet areas. Therefore, you should be cautious about using and disclosing your MTA email address. If you use email for information gathering purposes, we strongly recommend that you not use your MTA email address but rather establish a separate email account for that purpose with a free email service, such as yahoo.com or google.com.

**Etiquette.** Proper business etiquette should be maintained when communicating via email. When writing business email, be as clear and concise as possible. Sarcasm,

poor language, inappropriate comments, attempts at humor, and so on, should be avoided. When communicating via email, there are no facial expressions and voice tones to assist in determining the meaning or intent behind a certain comment. This leaves too much room for misinterpretation. Email communications should resemble typical professional and respectful business correspondence.

#### **Personal Use of MTA-Provided Email.**

Personal use of MTA-provided email is never permitted.

#### **Prohibited and/or Inappropriate Use of MTA IT Resources and Communications Systems**

You are never permitted to use the MTA's IT resources and communications systems, including email, for any inappropriate or unlawful purpose. This includes but is not limited to:

- Misrepresenting yourself as another individual or MTA.
- Sending, posting, recording, or encouraging receipt of messages or information that may be offensive because of their sexual, racist, or religious content.
- Revealing MTA's proprietary or confidential information, or intellectual property without authorization.
- Conducting or soliciting illegal activities.
- Representing your personal opinion as that of the MTA.
- Interfering with the performance of your responsibilities or the jobs/responsibilities of other MTA non-employee users; both non-employees and employees.
- For any other purpose that violates MTA's BOD policies or practices.
- State law prohibiting public employees from engaging in activity such as solicitation of contributions for certain political activity, etc. are still applicable and in effect - even when using MTA issued email. Follow all laws, rules and regulations related to such activity.
- Further, MTA email may not be used for campaigning related to any Local, MTA or NEA position.
- Finally, users are prohibited from representing themselves as MTA employees and are also prohibited from entering any contracts, to make purchases, or to engage outside vendors in any way.

#### **Discipline**

Non-employee users who violate any provision of this policy are subject to discipline, up to and including termination of membership in accordance with MTA BOD Policy and Bylaws.

## Proposed Policy Change

Amendment to:

### **Policy 165. NATIONAL EDUCATION ASSOCIATION**

*Add policy as follows:*

#### **ELECTION OF NEA RESOLUTIONS COMMITTEE MEMBERS**

- A. The term of service on the NEA Resolutions Committee shall be for two (2) years, from September 1 to August 31.
  
- A. The election of members of the committee will occur on a staggered basis, with half the seats to which the MTA is entitled elected every year. Per the NEA's guidelines, no member may serve more than six (6) years. To comply with this rule, a two-year term may be adjusted to a one-year term to prevent a member from serving more than the maximum six (6) years.
  
- A. Resolutions Committee members will be elected by NEA-RA delegates in attendance at the second on-site caucus meeting of MTA delegates, wherein delegates may vote for a number of candidates up to the number of seats to be filled. Candidates shall be ranked in order of votes received, filling the seats subject to election in descending order of votes won until all available seats are filled.
  
- A. Alternate members of the committee will be elected at the following caucus meeting at the same RA, with alternates filling any seats vacated during the following year in descending order of votes won during the most recent vote. Members who ran for, but were not elected to, Resolutions committee seats may run as an alternate. Each alternate will be elected to a one-year term.
  
- A. As part of the transition, half the members of the resolutions committee elected in 2025 will serve a one-year term.

## **New Policy #20.25.15 Guest Speaker and Observer Norms**

The Massachusetts Teachers Association is committed to providing a respectful and inclusive environment for all participants. We expect all attendees, presenters, exhibitors, and volunteers to abide by the following Code of Conduct:

Treat all individuals with respect, empathy, and kindness, fostering an environment free from harassment, discrimination, and offensive behavior. Encourage diverse perspectives, experiences, and ideas. Harassment of any kind, including but not limited to verbal, written, or physical conduct that is intimidating, offensive, or discriminatory, will not be tolerated. This includes offensive language, gestures, imagery, or unwelcome attention. Respect the privacy and boundaries of others. Participants who observe or are affected by any of these are asked to report such to either Board member appointed by the Chair for this purpose. Any participant who violates these norms may be subject to sanction, including expulsion from the meeting.

## **Proposed Amendment:**

### **20.05.14 Guest Speaker Recognition Procedure**

- A 30-minute period, prior to Action Items, shall be available for members (in the audience) to address the Board on specific agenda items or other issues that are of concern. **This time is reserved for MTA members who are not on the Board.**
- There will be a strict limit of two (2) minutes for each guest speaker.
- A guest speaker who wishes to address the Board must register with MTA Governance no later than noon on the **Thursday** immediately before the Board meeting. Guest speakers:
  - May attend in-person; or
  - May submit video testimony; or
  - May ask their Board Director to read **written** comments on their behalf; or
  - **May submit written testimony.**
    - Members **who submit video testimony** are encouraged to send in written comments in the event of technical difficulty.
- ~~Persons wishing to make comments will register with the Vice President prior to the start of the meeting. Speakers will be heard in the order in which they are registered.~~
- **The Vice President or designee will keep the time and the time limit will be strictly enforced.**
- Depending on the number of persons registered, speakers may be asked to limit their remarks in order to hear as many as possible within the time allowed.
- If no speakers are registered, the order of business as adopted will continue.
- No motions or debate shall take place during the guest speaker recognition period.
- A copy of the policy will be mailed with the Board agenda to those who receive that agenda. The procedure will be explained at the commencement of each Board meeting.
- This policy may be waived by a majority vote of the Board of Directors.

***Board of Directors: October 1982***

***Amended: March 1983***

## Proposed Amendment to Policy #20.25.17 Guidelines for Streamlining and Conduct of Board Meetings

1. Board meetings will start on time. The purpose of Board meetings is to conduct the business of the Association for as long as it takes. Therefore, there is no set time for adjournment.
2. Preparation (reading materials sent in advance) is the best vehicle to a more efficient meeting.
3. When Board materials are received, there is an expectation that Board members will call their Executive Committee members for information. Executive Committee members should have meetings with the Board members in their region prior to each Board meeting.
4. Specific issues germane only to individual locals should be dealt with away from the Board meetings.
5. All written reports will be read by the Board in advance. Information in the written report will not be repeated verbally. There will be an opportunity for questions and answers for a few minutes on each report.
6. The meeting will be conducted in accordance with ***Roberts' Rules of Order, Newly Revised***, except where MTA has set other rules by policy or bylaw.
7. The Vice President will maintain the speaking order for the President.
8. The President will appoint one Executive Committee member as one point of contact for guest conduct referrals or complaints. The Board of Directors will elect one point of contact for guest conduct referrals or complaints. The terms for both positions shall be one (1) year.
9. The following statement will be on display prior to the Guest Speaker portion of the meeting:

At every board meeting we reserve 30 minutes for members of the MTA who may wish to speak either in person or by video testimony. All comments will be accepted as advice but may not be responded to tonight. If you request follow-up, provide your contact information and indicate in your remarks if you would like follow-up. Remarks including any personal attacks about anyone, including members of the MTA Staff or members of the board, will not be tolerated.

DATE OF MEETING: July 28, 2024

ITEM NO. \_\_\_\_\_

MTA Board of Directors' Meeting  
ITEM OF NEW BUSINESS

Check One:  • Proposed Policy •  Proposed One-Time Action •  Informational Item

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**MOVED:** The additional underlined addition to MTA Policy 175.45 Hiring Policy and Procedure for Management and Professional Staff.

The Personnel Selection Team (PST) for each job opening should include the President, Vice President, Executive Director-Treasurer, and at least four others who are members of the Board of Directors. In addition to the President and Vice President who are members of the Executive Committee, at least one of the other members should be a current member of the Executive Committee, and when possible at least half of the other members should be ethnic minority members. Members of the PST must be members of the Board of Directors, and their eligibility to serve on the PST shall run concurrent with their Board of Directors term. The Director of Human Resources and appropriate staff Managers may be present at the discretion of the President. Every effort shall be made to assemble the seven members of the PST to include ESP, Higher Ed, PreK-12, non-classroom educators, and retired members. Selection for the Personnel Selection Team will reflect the diversity of MTA membership. After exercising every reasonable effort to assemble the PST in the manner described above, the President may decide to go forward with the PST with a minimum of 3 available PST members, exclusive of the President, Vice President and Executive Director-Treasurer; all of whom must be voting members of the Board of Directors.

Every effort shall be made to assemble the seven members of the PST to include ESP, Higher Ed, PreK-12, non-classroom educators, and retired members. MTA leadership shall endeavor to include all members of the Executive Committee and Board of Directors on a PST through an equitable assignment rotation,

Selection for the Personnel Selection Team will reflect the diversity of MTA membership.

After exercising every reasonable effort to assemble the PST in the manner described above, the President may decide to go forward with the PST with a minimum of 3 available PST members, exclusive of the President, Vice President and Executive Director-Treasurer; all of whom must be voting members of the Board of Directors.

**RATIONALE:**

**COST ESTIMATE:**

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**STAFF TIME ESTIMATE:**

**SUBMITTED BY:**

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**PROPOSED AMENDMENT TO THE MTA BYLAWS**

Name of Proposed Amendment: **Article IV: FINANCE, Section 1.C. Budget; and Section 2. Dues, A. Active Members, (1) Full-Time Dues**

<b>PRESENT TEXT:</b>	<b>PROPOSED AMENDED TEXT:</b>
<p><b>Indicate Bylaw Article and Section/s:</b></p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <p><b>Article IV: Section 1.C and Section 2.A(1)</b></p> </div>	<p><b>Indicate Bylaw Article and Section/s:</b></p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <p><b>Article IV: Section 1.C and Section 2.A(1)</b></p> </div>
<p><b>Section 1. Budget</b></p> <p>C. The annual dues of active members and the budget of the Association shall be recommended to the Annual Meeting of Delegates by the Board of Directors. The budget must be approved by a majority of the delegates voting at the Annual Meeting of Delegates.</p> <p>The adoption of the budget will automatically determine the annual dues for active members rounded to the next higher dollar amount.</p> <p><b>Section 2. Dues</b></p> <p>Full-time dues and part-time dues percentages are based upon membership category.</p> <p style="padding-left: 40px;">A. Active Members</p> <p style="padding-left: 80px;">(1) Full-Time Dues</p> <p style="padding-left: 80px;">Except as provided herein, the annual dues of active members shall be the amount approved by the Annual Meeting of Delegates.</p>	<p style="color: green; font-weight: bold;"><i>Proposed changes shown as strikethrough (removed) and underlined (added)</i></p> <p><b>Section 1. Budget</b></p> <p>C. The <del>annual dues of active members and the</del> budget of the Association shall be recommended to the Annual Meeting of Delegates by the Board of Directors. The budget must be approved by a majority of the delegates voting at the Annual Meeting of Delegates.</p> <p><del>The adoption of the budget will automatically determine the annual dues for active members rounded to the next higher dollar amount.</del></p> <p><b>Section 2. Dues</b></p> <p>Full-time dues and part-time dues percentages are based upon membership category.</p> <p style="padding-left: 40px;">A. Active Members</p> <p style="padding-left: 80px;">(1) Full-Time Dues</p> <p style="padding-left: 80px;">Except as provided herein, the annual dues of active members shall be the amount approved by the Annual Meeting of Delegates.</p> <p style="padding-left: 80px;"><u>The full-time dues shall increase each year by 2.5% and will be reflected in the budget that delegates vote on at the Annual Meeting. The Delegates may, by majority vote, approve a larger increase. The Delegates may, by two-thirds vote, approve a lesser increase.</u></p> <p style="padding-left: 80px;"><u>The annual dues for active members will be rounded to the next higher dollar amount.</u></p>

**Impact Statement:**

This amendment would establish a baseline annual dues increase of 2.5% for active full-time members, with a majority vote of the delegates required to adopt a higher increase, and with a 2/3 majority vote of the delegates required to adopt a lesser increase.

**Submitted by:**

Max Page, MTA President. Local: MA Society of Professors  
Deb McCarthy, MTA Vice President. Local: Hull Teachers Assn.

**Bylaws and Rules Committee:**

Recommends Adoption (8 – 0)

**Proposed Amendments to the MTA Resolutions**  
**Recommended by the Resolutions Committee on Feb. 25, 2025**

**Resolutions Committee members:**

Deb Gesualdo, Chair

Conner Bourgoin

Joanna Gonsalves

Amy Morin

Penelope Jennewein

Rachel Hebert

Keith Michon Jr.

Mary MacDonald, Staff Consultant

Laura Mullen, Staff Assistant

**CURRENT RESOLUTION B-20      PHYSICAL EDUCATION**

The Massachusetts Teachers Association believes that physical activity is essential to good health. Therefore, a comprehensive program of physical education – one that is developmental, sequential, cooperative in nature and culturally sensitive – should be provided daily in grades pre-kindergarten through 12 in or on a facility designed for that purpose.

The MTA further believes that such programs should be planned, directed and taught by licensed physical education teachers. (92, 99, 09)

**PROPOSED AMENDED RESOLUTION B-20      PHYSICAL EDUCATION**

The Massachusetts Teachers Association believes that physical activity is essential to good health. Therefore, a comprehensive program of physical education – one that is developmental, sequential, cooperative in nature and culturally sensitive – should be provided daily in grades pre-kindergarten through 12 in or on a facility designed for that purpose.

The MTA urges individuals and families to renew their commitment to make daily quality health and physical education a part of their lives and in every school curriculum.

Physical education programs that require 225 minutes per week for middle and high school levels and 150 minutes per week for the elementary level would ensure well-rounded students, both academically and physically.

The MTA believes the inclusion of a comprehensive, skills-based health education program is a necessity in all grades, kindergarten through 12, to educate students of the Commonwealth to improve lifelong health.

Required time for health education students in PreK-2 should include a minimum of 40 hours, and for students in grades 3-12, a minimum of 80 hours of instruction per academic year.

There shall be no substitution of other instruction or activities for physical education or health education.

Coursework for health and physical education shall be regulated under the SHAPE National Physical Education Standards and the National Health Education Standards 3rd edition, an initiative of the National Consensus for Health Education.

Health and physical education shall be only taught by *licensed* health and physical education teachers.

~~The MTA further believes that such programs should be planned, directed and taught by licensed physical education teachers.~~

The MTA further believes that quality health and physical education programs are the best health insurance and K-12 students should not be denied daily access to either program.  
(92, 99, 09, 25)

## **Current Resolution F-15**

## **RETIREMENT**

The Massachusetts Teachers Association shall continue to seek improvement in the Massachusetts Teachers' Retirement System and strongly disapproves of any action by the state Legislature or by the Congress of the United States or local governing bodies which would reduce retirement rights and benefits of Massachusetts educators.

The MTA supports a retirement system that provides for:

- Retirement security for retirees through a defined-benefit pension plan that is guaranteed for life, including cost-effective disability and survivor benefits;

- Automatic cost-of-living adjustments for retirees and beneficiaries that reflect actual increases in the cost of living;
- Purchase of credit for all approved leaves; and
- Full funding of the pension liability by the state.

The MTA believes that provisions must be made for comprehensive health insurance for all retired education employees and their spouses or domestic partners and that the state and/or local community contribute at least 50 percent of the premium costs.

The MTA further believes that domestic partners should have available to them the same retirement benefit options as are available to married individuals. (90, 99, 01, 09, 19)

### **Proposed Amended Resolution F-15      RETIREMENT**

The Massachusetts Teachers Association shall continue to seek improvement in the Massachusetts Teachers' Retirement System and strongly disapproves of any action by the state Legislature or by the Congress of the United States or local governing bodies which would reduce retirement rights and benefits of Massachusetts educators.

The MTA supports a retirement system that provides for:

- Retirement security for retirees through a defined-benefit pension plan that is guaranteed for life, including cost-effective disability and survivor benefits;
- Automatic cost-of-living adjustments for retirees and beneficiaries that reflect actual increases in the cost of living;
- Purchase of credit for all approved leaves; and
- Full funding of the pension liability by the state.

Furthermore, The Massachusetts Teachers Association recognizes the importance of securing retirement contributions, from public higher education employers, for their part-time faculty members who teach at least two courses per semester across public institutions of higher education. Such benefits must be equal to those of other employees of the Commonwealth who work 20 or more hours per week.

The MTA believes that provisions must be made for comprehensive health insurance for all retired education employees and their spouses or domestic partners and that the state and/or local community contribute at least 50 percent of the premium costs.

The MTA further believes that domestic partners should have available to them the same retirement benefit options as are available to married individuals. (90, 99, 01, 09, 19, 25)



March 18, 2025

To: MTA Board of Directors  
From: Brian Fitzgerald, Chair, Electoral Review Committee  
Re: Recommended Electoral Region and District Plan

In accordance with its responsibilities as defined by the MTA Bylaws, the Electoral Review Committee (ERC) has finalized its review of the MTA Electoral District and Region Plan and presents this report to the MTA Board of Directors for placement on the agenda of the March meeting. This report includes the recommended plan, unanimously approved by ERC, for action by the delegates to the 2025 Annual Meeting.

Per MTA's Bylaws, it is ERC's responsibility to review the plan that was established three years ago and recommend a plan to the Annual Meeting which complies with MTA Bylaws and NEA standards. Upon approval of a majority of delegates present and voting at the Annual Meeting, the plan will be implemented on July 1, 2025.

ERC's review of the June 2024 membership figures showed that the existing Electoral District and Region plan DOES MEET the mathematical compliance according to NEA affiliation standards and the "one person, one vote principle."

In accordance with the Bylaws, notice was provided to Local Presidents and Board members for two separate opportunities to give input, once prior to initial review of the plan and then prior to finalizing the proposed plan. Note that the proposed plan was shared with Local Presidents and Board members on December 11, 2024 as part of the outreach and invitation to provide input before finalizing ERC's recommendation.

**Summary:**

In its review of the current compliant plan, the committee has voted to recommend no changes to the current plan (attached).

The Bylaws require that the electoral districts shall be drawn based on a ratio of 1:1900 or major fraction thereof. This means the acceptable range for district size is 951 – 2850 members.

In order to be in compliance with the one-person, one vote principle, as required by NEA, the smallest districts making up a bare majority of the District Board Seats must represent at least 45.1% of the total membership. The current and recommended plan achieves this compliance.

- Attachment A is the current and recommended plan, the list of MTA Local Affiliates by District.
- Attachment B shows the membership figures for the current and recommended plan, indicating mathematical compliance with the one-person, one-vote principle.
- Attachment C is an explanation of the "one person, one vote principle" and the steps taken to test compliance.

**Members of the Electoral Review Committee:**

Brian Fitzgerald, Chair	Robert Erlandsen
Jackie Bishop	Sarah McKeon
Mary Pat Dodge	Bobby Travers



## MTA Electoral Regions and Districts

### **Region A**

#### **DISTRICT 01A**

ADAMS CHESHIRE TEACHERS ASSN  
BERKSHIRE HILLS EDUCATION ASSN  
CENTRAL BERKSHIRE EDUCATORS ASSN.  
CLARKSBURG TEACHERS ASSN  
FARMINGTON RIVER EDUCATORS ASSN  
FLORIDA EDUCATION ASSN  
HANCOCK TEACHERS ASSN  
LEE EDUCATION ASSN  
LENOX EDUCATION ASSN  
MCCANN FACULTY ASSN  
MOUNT GREYLOCK EDUCATORS ASSN  
NORTH ADAMS PARAPROFESSIONALS ASSN  
NORTH ADAMS TEACHERS ASSN  
PITTSFIELD EDUCATIONAL ADMINISTRATORS ASSN  
RICHMOND EDUCATORS' ASSN  
SAVOY EDUCATION ASSN  
SOUTHERN BERKSHIRE REGIONAL EDUCATION ASSN  
UNITED EDUCATORS OF PITTSFIELD

#### **DISTRICT 02A**

AGAWAM EDUCATION ASSN  
AGAWAM PROFESSIONAL ADMINISTRATORS ASSN  
GATEWAY EDUCATION ASSOCIATION INC.  
SOUTHWICK-TOLLAND-GRANVILLE EDUCATION ASSN INC  
WEST SPRINGFIELD EDUCATION ASSN  
WESTFIELD EDUCATION ASSN

#### **DISTRICT 03A**

BELCHERTOWN EDUCATION ASSN  
CHESTERFIELD GOSHEN TEACHERS ASSN  
EASTHAMPTON EDUCATION ASSN  
GRANBY EDUCATORS ASSN  
HADLEY EDUCATION ASSN  
HAMPSHIRE REGIONAL EDUCATION ASSN  
HATFIELD TEACHERS ASSN  
NORTHAMPTON ASSN OF SCHOOL EMPLOYEES  
SOUTH HADLEY EDUCATION ASSN  
SOUTHAMPTON TEACHERS ASSN  
WARE TEACHERS ASSN  
WESTHAMPTON TEACHERS ASSN  
WILLIAMSBURG TEACHERS ASSN

#### **DISTRICT 04A**

AMHERST-PELHAM ADMINISTRATORS ASSN  
AMHERST-PELHAM EDUCATION ASSN  
ATHOL TEACHERS ASSN  
ERVING TEACHERS ASSN  
FRANKLIN COUNTY TECHNICAL TEACHERS ASSN  
FRONTIER REGIONAL EDUCATION ASSN  
GILL-MONTAGUE EDUCATION ASSN  
GREENFIELD EDUCATION ASSN  
HAWLEMONT TEACHERS ASSN  
LEVERETT EDUCATION ASSN  
MAHAR TEACHERS ASSN  
MOHAWK DISTRICT EDUCATION ASSN INC  
ORANGE ELEMENTARY TEACHERS ASSN  
PETERSHAM EDUCATIONAL ASSN  
PIONEER VALLEY ASSN OF SUPPORT PROFESSIONALS  
PIONEER VALLEY REGIONAL EDUCATION ASSN  
ROWE TEACHERS ASSN  
SHUTESBURY EDUCATION ASSN  
SWIFT RIVER EDUCATION ASSN  
UNION # 38 EDUCATORS ASSN

#### **DISTRICT 05A**

SPRINGFIELD ADMINISTRATORS ASSN  
SPRINGFIELD EDUCATION ASSN  
TECHNICAL EMPLOYEES ASSN (SPRINGFIELD)

#### **DISTRICT 06A**

EAST LONGMEADOW EDUCATION ASSN  
HAMPDEN-WILBRAHAM EDUCATION ASSN  
LONGMEADOW EDUCATION ASSN  
LOWER PIONEER VALLEY EDUC COLLAB EDUCATORS UNION  
LUDLOW EDUCATION ASSN  
MONSON EDUCATORS ASSOCIATION INC  
PALMER TEACHERS ASSN  
PATHFINDER EDUCATION ASSN

#### **DISTRICT 26A**

CHICOPEE EDUCATION ASSN  
HOLYOKE EDUCATORS ASSN  
HOLYOKE PARAPROFESSIONALS ASSN  
HOLYOKE PUBLIC SCHOOL SECRETARIES ASSN  
HOLYOKE TEACHERS ASSN



## MTA Electoral Regions and Districts

### **Region B**

#### **DISTRICT 07B**

ASHBURNHAM WESTMINSTER EDUCATORS UNION  
 ASHBURNHAM-WESTMINSTER TEACHERS ASSN  
 FITCHBURG EDUCATION ASSN  
 GARDNER EDUCATION ASSN  
 LEOMINSTER ADMINISTRATORS ASSN  
 LEOMINSTER EDUCATION ASSN  
 LEOMINSTER SCHOOL SECRETARIES ASSN  
 LEOMINSTER TUTORS ASSN  
 MONTACHUSETT REG TEACHERS ASSN  
 NARRAGANSETT DISTRICT ED ASSN  
 PARAEDUCATOR ASSN OF LEOMINSTER SCHOOLS  
 WINCHENDON SECRETARIES ASSN  
 WINCHENDON SUPPORT PERSONNEL ASSN  
 WINCHENDON TEACHERS ASSN

#### **DISTRICT 08B**

AUBURN EDUCATION ASSN  
 BAY PATH ADMINISTRATORS ASSN  
 BAY PATH TEACHERS ASSN  
 BRIMFIELD EDUCATIONAL SUPPORT PROFESSIONALS ASSN  
 BROOKFIELD EDUCATIONAL SUPPORT PROFESSIONALS ASSN  
 DUDLEY-CHARLTON PARAPROFESSIONAL ASSN  
 DUDLEY-CHARLTON TEACHERS ASSN  
 EDUCATIONAL ASSN OF LEICESTER  
 HOLLAND EDUCATIONAL SUPPORT PROFESSIONALS ASSN  
 LEICESTER PARAPROFESSIONAL ASSN  
 NORTH BROOKFIELD TEACHERS ASSN  
 QUABBIN REGIONAL SCHOOL DISTRICT PARA ASSN  
 QUABBIN REGIONAL TEACHERS ASSN  
 QUABOAG EDUCATION ASSN  
 SOUTHBRIDGE EDUCATION ASSN  
 SOUTHERN WORCESTER COUNTY EDUCATIONAL COLLAB  
 SPENCER-EAST BROOKFIELD TEACHERS ASSN  
 STURBRIDGE EDUCATIONAL SUPPORT PERSONNEL ASSN  
 TANTASQUA EDUCATION ASSN  
 UNION 61 TEACHERS ASSN  
 WALES ESSENTIAL SUPPORT PERSONNEL

#### **DISTRICT 09B**

ALGONQUIN REGIONAL TEACHERS ASSN  
 BERLIN-BOYLSTON EDUCATORS' ASSN  
 GRAFTON TEACHERS ASSN  
 MENDON-UPTON REG TEACHERS ASSN  
 NORTHBORO TEACHERS ASSN  
 SOUTHBORO TEACHERS ASSN  
 WACHUSETT REGIONAL EDUCATION ASSN  
 WEST BOYLSTON TEACHERS ASSN  
 WESTBOROUGH EDUCATION ASSN

#### **DISTRICT 10B**

EDUCATIONAL ASSN OF WORCESTER INC  
 SHREWSBURY EDUCATION ASSN  
 SHREWSBURY PARAPROFESSIONALS ASSN

#### **DISTRICT 11B**

CENTRAL MASSACHUSETTS COLLABORATIVE UNION  
 DOUGLAS EDUCATIONAL SUPPORT PROFESSIONALS ASSN  
 DOUGLAS TEACHERS ASSN  
 HOPEDALE EDUCATION ASSN INC  
 MILFORD TEACHERS ASSN  
 MILLBURY TEACHERS ASSN  
 NORTHBRIDGE TEACHERS ASSN  
 OXFORD EDUCATION ASSN  
 SUTTON EDUCATION SUPPORT ASSN  
 SUTTON TEACHERS ASSN  
 UXBRIDGE TEACHERS ASSN  
 WEBSTER ADMINISTRATIVE ASSISTANTS  
 WEBSTER ADMINISTRATORS ASSN  
 WEBSTER EDUCATORS ASSN  
 WEBSTER INSTRUCTIONAL ASSISTANTS ASSN

### **Region C**

#### **DISTRICT 33C**

COHASSET TEACHERS ASSN  
 EDUCATION ASSN OF NORWELL  
 HANOVER TEACHERS ASSN  
 HINGHAM EDUCATION ASSN  
 HULL TEACHERS ASSN  
 MARSHFIELD EDUCATION ASSN  
 ROCKLAND EDUCATION ASSN  
 SCITUATE TEACHERS ASSN



## MTA Electoral Regions and Districts

### **DISTRICT 34C**

DUXBURY TEACHERS ASSN  
EDUCATION ASSN OF PLYMOUTH AND CARVER  
HALIFAX TEACHERS ASSN  
KINGSTON TEACHERS ASSN  
PEMBROKE TEACHERS ASSN  
PLYMOUTH ADMINISTRATORS ASSN  
PLYMPTON TEACHERS ASSN  
SILVER LAKE EDUCATION ASSN

### **DISTRICT 35C**

ABINGTON EDUCATION ASSN  
BRIDGEWATER-RAYNHAM EDUCATION ASSN  
EAST BRIDGEWATER ASSISTANT PRINCIPALS ASSN  
EAST BRIDGEWATER EDUCATION ASSN  
EDUCATORS' ASSN OF FREETOWN AND LAKEVILLE  
MIDDLEBORO EDUCATION ASSN  
READS COLLABORATIVE EDUCATORS ASSN  
WEST BRIDGEWATER EDUCATION ASSN  
WHITMAN-HANSON EDUCATION ASSN

### **DISTRICT 36C**

BROCKTON EDUCATION ASSN  
BROCKTON EDUCATION SUPPORT PROFESSIONAL ASSN  
STOUGHTON TEACHERS ASSN

### **DISTRICT 41C**

BARNSTABLE ADMINISTRATORS ORGANIZATION  
BARNSTABLE TEACHERS ASSN  
BOURNE EDUCATORS ASSN  
MARION TEACHERS ASSN  
MATTAPOISETT EDUCATORS ASSN  
OLD ROCHESTER PROFESSIONAL EDUCATORS' ASSN  
ROCHESTER MEMORIAL SUPPORT PERSONNEL ASSN  
ROCHESTER MEMORIAL TEACHERS ASSN  
SANDWICH EDUCATION ASSN  
SIPPICAN SCHOOL SUPPORT PERSONNEL ASSN  
UPPER CAPE COD REGIONAL TEACHERS ASSN  
WAREHAM EDUCATION ASSN

### **DISTRICT 42C**

CAPE TECH ASSN  
DENNIS-YARMOUTH EDUCATORS ASSN  
DENNIS-YARMOUTH REGL SECRETARIES AND ASSISTANTS  
FALMOUTH EDUCATORS ASSN  
MASHPEE TEACHERS ASSN  
MONOMOY REGIONAL EDUCATION ASSN  
NAUSET EDUCATION ASSN  
PROVINCETOWN ASSN OF EDUCATORS  
TRURO EDUCATION ASSN

### **DISTRICT 43C**

MARTHA'S VINEYARD EDUCATORS ASSN  
NANTUCKET TEACHERS ASSN

## **Region D**

### **DISTRICT 14D**

ASHLAND EDUCATORS ASSN  
FRAMINGHAM TEACHERS ASSN  
HOPKINTON TEACHERS ASSN  
KEEFE TECH SCHOOL SECRETARIAL ASSN  
KEEFE TECHNICAL EDUCATORS ASSN  
MARLBOROUGH EDUCATORS ASSN

### **DISTRICT 15D**

BEDFORD EDUCATION ASSN  
CARLISLE TEACHERS ASSN  
CASE PROFESSIONAL ASSN  
CONCORD TEACHERS ASSN  
CONCORD-CARLISLE BUS DRIVERS  
CONCORD-CARLISLE SUPPORT STAFF  
CONCORD-CARLISLE TEACHERS ASSN  
CONCORD-CARLISLE TUTORS ASSN  
LINCOLN EDUCATORS ASSN  
LINCOLN-SUDBURY REGIONAL TEACHERS  
SUDBURY EDUCATION ASSN  
WAYLAND TEACHERS ASSN  
WESTON AIDES AND PARAPROFESSIONALS ASSN  
WESTON EDUCATION ASSN  
WESTON EDUCATIONAL ADMINISTRATIVE ASSISTANTS ASSN



## MTA Electoral Regions and Districts

### **DISTRICT 27D**

BROOKLINE EDUCATORS UNION  
DEDHAM EDUCATION ASSN  
MILTON EDUCATORS ASSN

### **DISTRICT 28D**

DOVER-SHERBORN EDUCATION ASSN  
FRANKLIN EDUCATION ASSN  
MEDFIELD TEACHERS ASSN  
MILLIS TEACHERS ASSN  
NORWOOD TEACHERS ASSN  
TRI COUNTY MAINTENANCE ASSN  
TRI COUNTY TEACHERS ASSN  
WESTWOOD TEACHERS ASSN

### **DISTRICT 29D**

NATICK ASSN OF ADMIN ASSISTANTS AND CLERKS  
NEEDHAM EDUCATION ASSN  
THE EDUCATION ASSN OF NATICK  
WELLESLEY EDUCATORS ASSN

### **DISTRICT 32D**

AVON EDUCATION ASSN  
BRAintree EDUCATION ASSN  
HOLBROOK EDUCATION ASSN  
QUINCY EDUCATION ASSN  
WEYMOUTH EDUCATORS ASSN

## **Region E**

### **DISTRICT 30E**

BELLINGHAM TEACHERS ASSN  
BLACKSTONE VALLEY REG VOCATIONAL  
BLACKSTONE-MILLVILLE REG SCHOOL DISTRICT EDUCATORS ASSN  
BLACKSTONE-MILLVILLE SUPPORT PERSONNEL ASSN  
KING PHILIP TEACHERS ASSN  
NORFOLK TEACHERS ASSN  
PLAINVILLE EDUCATION ASSN  
SHARON TEACHERS ASSN  
TECCA UNION  
WALPOLE TEACHERS ASSN  
WRENTHAM EDUCATORS' ASSN

### **DISTRICT 37E**

BLUE HILLS REG VOC TEACHERS ASSN  
BRISTOL-PLYMOUTH TEACHERS ASSN  
CANTON EDUCATORS ASSN  
EASTON EDUCATORS ASSN  
RANDOLPH EDUCATION ASSN  
SEGREGANSET TEACHERS ASSN  
TAUNTON ADMINISTRATORS ASSN  
TAUNTON EDUCATION ASSN  
TAUNTON EDUCATIONAL SECRETARIES AND ASSISTANTS  
TAUNTON THERAPY ASSISTANTS ASSN

### **DISTRICT 38E**

ATTLEBORO ASSN OF CLERICAL PERSONNEL  
ATTLEBORO EDUCATION ASSN  
ATTLEBORO PARAPROFESSIONALS ASSN  
ATTLEBORO PUBLIC SCH ADMINISTRATORS ASSN  
ATTLEBORO SCH DEPT BLDG TRADES MAINT MECHS ASSN  
ATTLEBORO SCHOOL CUSTODIANS ASSN  
BRISTOL COUNTY AGRICULTURAL H S SUPP STAFF ASSN  
FOXBOROUGH EDUCATION ASSN  
MANSFIELD ASSN OF SECRETARIES AND CLERKS  
MANSFIELD BUILDING AND GROUNDS ASSN  
MANSFIELD EDUCATORS ASSN  
NORTON TEACHERS ASSN

### **DISTRICT 39E**

BERKLEY TEACHERS ASSN  
DIGHTON-REHOBOTH REGIONAL PARAPROFESSIONALS ASSN  
DIGHTON-REHOBOTH TCHRS ASSN  
DIMAN TEACHERS ASSN  
FALL RIVER EDUCATORS ASSN  
SEEKONK EDUCATORS ASSN  
SOMERSET TEACHERS ASSN  
SWANSEA EDUCATORS ASSN

### **DISTRICT 40E**

ACUSHNET TEACHERS ASSN  
DARTMOUTH EDUCATORS ASSN  
FAIRHAVEN EDUCATORS ASSN  
GREATER NEW BEDFORD ADMINISTRATORS UNION  
GREATER NEW BEDFORD EDUCATORS UNION  
NEW BEDFORD EDUCATORS ASSN  
NEW BEDFORD SUPPORT SPECIALISTS UNION



## MTA Electoral Regions and Districts

### **Region F**

#### **DISTRICT 12F**

CHELMSFORD SCHOOL ADMINISTRATORS  
DRACUT ADMINISTRATORS ASSN  
DRACUT PARAPROFESSIONALS ASSN  
DRACUT TEACHERS ASSN  
GREATER LOWELL EDUCATIONAL SUPPORT PERSONNEL  
GREATER LOWELL PARAEDUCATOR ORGANIZATION  
GREATER LOWELL REGIONAL TEACHERS ORGANIZATION  
GROTON DUNSTABLE EDUCATORS ASSN  
NORTH MIDDLESEX REGIONAL SCH DIST TEACHERS ASSN  
TEWKSBURY TEACHERS ASSN  
TYNGSBOROUGH TEACHERS ASSN  
WESTFORD EDUCATION ASSN

#### **DISTRICT 13F**

ACTON BOXBOROUGH EDUCATION ASSN  
ACTON BOXBOROUGH OFFICE SUPPORT ASSN  
AYER SHIRLEY REGIONAL EDUCATION ASSN  
CLINTON TEACHERS ASSN  
HARVARD EDUCATORS ASSN  
HUDSON EDUCATION ASSN  
HUDSON PARAEDUCATORS ASSN  
HUDSON SCHOOL ADMINISTRATIVE ASSISTANT ASSN  
LITTLETON EDUCATORS ASSN  
LUNENBURG EDUCATION ASSN  
MAYNARD EDUCATION ASSN  
MAYNARD EDUCATION SUPPORT ASSN  
NASHOBA REG EDUCATION ASSN

#### **DISTRICT 22F**

ANDOVER ADMINISTRATORS ASSN  
ANDOVER EDUCATION ASSN  
METHUEN ADMINISTRATORS ASSN  
METHUEN EDUCATION ASSN  
NORTH ANDOVER TEACHERS ASSN

#### **DISTRICT 23F**

BOXFORD TEACHERS ASSN  
HAVERHILL EDUCATION ASSN  
MASCONOMET TEACHERS ASSN  
MIDDLETON EDUCATORS ASSN  
NEWBURYPORT INSTRUCTIONAL ASSISTANTS ASSN  
NEWBURYPORT TEACHERS ASSN  
PENTUCKET ASSN OF TEACHERS  
TOPSFIELD TEACHERS ASSN  
TRITON REGIONAL TEACHERS ASSN  
WHITTIER REGIONAL TEACHERS ASSN

#### **DISTRICT 24F**

BEVERLY TEACHERS ASSN  
DANVERS TEACHERS ASSN  
GEORGETOWN EDUCATION ASSN  
GEORGETOWN EDUCATION SUPPORT ASSN  
GLOUCESTER ASSN OF EDUCATIONAL PARAPROFESSIONALS  
GLOUCESTER TEACHERS ASSN  
HAMILTON-WENHAM EDUCATION ASSN  
IPSWICH EDUCATORS ASSN  
MANCHESTER-ESSEX TEACHERS ASSN  
ROCKPORT EDUCATIONAL SUPPORT STAFF ASSN  
ROCKPORT TEACHERS ASSN

#### **DISTRICT 25F**

LYNNFIELD TEACHERS ASSN  
MARBLEHEAD EDUCATION ASSN  
NAHANT TEACHERS ASSN  
NORTH READING EDUCATION ASSN  
PEABODY SCHOOL ADMINISTRATORS  
REVERE TEACHERS ASSN  
SAUGUS EDUCATIONAL PARAS ASSN  
SAUGUS EDUCATORS ASSN  
SAUGUS SCHOOL CLERICAL ASSN  
SWAMPSCOTT EDUCATION ASSN  
WINTHROP TEACHERS ASSN



## MTA Electoral Regions and Districts

### **Region G**

#### **DISTRICT 16G**

BILLERICA ADMINISTRATORS GROUP  
BURLINGTON EDUCATORS ASSN  
LABBB COLLABORATIVE EDUCATION ASSN  
SHAWSHEEN TEACHERS ASSN  
WILMINGTON TEACHERS ASSN  
WINCHESTER EDUCATION ASSN  
WOBURN TEACHERS ASSN

#### **DISTRICT 17G**

LEXINGTON EDUCATION ASSN  
MINUTEMAN FACULTY ASSN  
STONEHAM EDUCATION ASSN  
WALTHAM EDUCATORS ASSN

#### **DISTRICT 18G**

NEWTON TEACHERS ASSN  
WATERTOWN EDUCATORS ASSN

#### **DISTRICT 19G**

CAMBRIDGE EDUCATION ASSN  
CAMBRIDGE SAFETY SPECIALISTS ASSN  
CHELSEA ADMINISTRATORS ASSN  
SOMERVILLE EDUCATORS UNION

#### **DISTRICT 20G**

ARLINGTON EDUCATION ASSN  
BELMONT EDUCATION ASSN  
EVERETT TEACHERS ASSN  
MEDFORD PARAPROFESSIONALS ASSN  
MEDFORD TEACHERS ASSN

#### **DISTRICT 21G**

MALDEN EDUCATION ASSN  
MELROSE EDUCATORS UNION  
NORTHEAST SECRETARIES ASSN  
NORTHEAST SUPERVISORS ASSN  
NORTHEAST TEACHERS ASSN  
READING ASSN OF SECRETARIES AND CLERKS  
READING PARAEDUCATORS ASSN  
READING TEACHERS ASSN  
WAKEFIELD EDUCATION ASSN

### **Region H**

#### **DISTRICT 44H**

MASS COMMUNITY COLLEGE COUNCIL

#### **DISTRICT 45H**

MASS STATE COLLEGE ASSN

#### **DISTRICT 46H**

DEPARTMENT CHAIR UNION  
FACULTY STAFF UNION UMASS BOSTON  
MA SOCIETY OF PROFESSORS UMASS AMHERST

#### **DISTRICT 47H**

ASSOCIATION OF PROFESSIONAL ADMINISTRATORS  
UMASS LOWELL GRANT AND CONTRACT FUND EMPLOYEES  
UMASS LOWELL MA SOCIETY OF PROFESSORS

#### **DISTRICT 48H**

CLASSIFIED STAFF UNION  
UMASS LOWELL CLASSIFIED TECH UNION  
UMASS LOWELL MAINTENANCE TRADE UNION  
UNIVERSITY STAFF ASSN UMASS AMHERST

#### **DISTRICT 49H**

PROFESSIONAL STAFF UNION

Membership as of June 2024 -- Current Plan						
ERC Compliance Test						
District	Members	Cumulative Members	% of Membership	Cumulative % of Mbrship	Board Seats/Votes	Cumulative Board Votes
1	DISTRICT 43	763	0.72%	0.72%	1	1
2	DISTRICT 48	1108	1.05%	1.77%	1	2
3	DISTRICT 26	1483	1.40%	3.17%	1	3
4	DISTRICT 44(a)	1627	1.54%	4.70%	1	4
5	DISTRICT 44(b)	1628	1.54%	6.24%	1	5
6	DISTRICT 06	1674	1.58%	7.82%	1	6
7	DISTRICT 49	1747	1.65%	9.47%	1	7
8	DISTRICT 47	1841	1.74%	11.21%	1	8
9	DISTRICT 02	1872	1.77%	12.97%	1	9
10	DISTRICT 03	1874	1.77%	14.74%	1	10
11	DISTRICT 38	1908	1.80%	16.54%	1	11
12	DISTRICT 04	1949	1.84%	18.38%	1	12
13	DISTRICT 01	1956	1.85%	20.23%	1	13
14	DISTRICT 42	1996	1.88%	22.11%	1	14
15	DISTRICT 27	2022	1.91%	24.02%	1	15
16	DISTRICT 46	2072	1.96%	25.98%	1	16
17	DISTRICT 29	2073	1.96%	27.93%	1	17
18	DISTRICT 41	2094	1.98%	29.91%	1	18
19	DISTRICT 11	2108	1.99%	31.90%	1	19
20	DISTRICT 10(a)	2110	1.99%	33.89%	1	20
21	DISTRICT 10(b)	2110	1.99%	35.88%	1	21
22	DISTRICT 34	2127	2.01%	37.89%	1	22
23	DISTRICT 08	2129	2.01%	39.90%	1	23
24	DISTRICT 30	2131	2.01%	41.91%	1	24
25	DISTRICT 36	2144	2.02%	43.94%	1	25
26	DISTRICT 28	2145	2.02%	45.96%	1	26
27	DISTRICT 12	2163	2.04%	48.00%	1	27
28	DISTRICT 15	2198	2.07%	50.08%	1	28
29	DISTRICT 13	2208	2.08%	52.16%	1	29
30	DISTRICT 19	2225	2.10%	54.26%	1	30
31	DISTRICT 45	2230	2.10%	56.37%	1	31
32	DISTRICT 39	2235	2.11%	58.48%	1	32
33	DISTRICT 22	2287	2.16%	60.63%	1	33
34	DISTRICT 35	2310	2.18%	62.82%	1	34

**Majority of BOD District Seats (26)**  
 Must Be  
 At Least  
**45.10%**  
**DOES COMPLY**

	District	Members	Cumulative Members	Membership % of	Cumulative % of Mbrship	Board Seats/Votes	Cumulative Board Votes
35	DISTRICT 21	2317	68,864	2.19%	65.00%	1	35
36	DISTRICT 07	2323	71,187	2.19%	67.19%	1	36
37	DISTRICT 09	2323	73,510	2.19%	69.39%	1	37
38	DISTRICT 16	2343	75,853	2.21%	71.60%	1	38
39	DISTRICT 40	2344	78,197	2.21%	73.81%	1	39
40	DISTRICT 24	2396	80,593	2.26%	76.07%	1	40
41	DISTRICT 25	2414	83,007	2.28%	78.35%	1	41
42	DISTRICT 37	2414	85,421	2.28%	80.63%	1	42
43	DISTRICT 17	2431	87,852	2.29%	82.93%	1	43
44	DISTRICT 33	2455	90,307	2.32%	85.24%	1	44
45	DISTRICT 18	2481	92,788	2.34%	87.58%	1	45
46	DISTRICT 23	2513	95,301	2.37%	89.96%	1	46
47	DISTRICT 14	2587	97,888	2.44%	92.40%	1	47
48	DISTRICT 32	2600	100,488	2.45%	94.85%	1	48
49	DISTRICT 05	2642	103,130	2.49%	97.35%	1	49
50	DISTRICT 20	2811	105,941	2.65%	100.00%	1	50
	<b>Totals</b>	<b>105,941</b>		<b>100.00%</b>		<b>50</b>	
	<b>One-person, one-vote Compliance Test:</b>						
	The above list is sorted from the smallest district to the largest.						
	The compliance test (at row 26) looks at whether or not the smallest 26 districts represent at least 45.1% of the membership.						
	To meet compliance, the smallest districts that constitute a <b>majority</b> of the Board's district votes (26 votes) must represent 50.1% of the membership (plus or minus 5%)						
	<b>Other Criteria for Electoral Regions and Districts:</b>						
	<ul style="list-style-type: none"> <li>A ratio of 1:1900 or major fraction thereof shall be used in drawing up districts with the exception of the Dukes-Nantucket district, the Massachusetts Community College Council district, and the statewide retired district. (Major fraction thereof: one half or higher. One half of 1900 = 950. One and one half of 1900 = 2850. So, the acceptable range for district size is 950 to 2850.)</li> <li>There shall be an identifiable constituency for each Board and Executive Committee member.</li> <li>There shall be eight electoral regions: Seven regions shall be drawn based on geographical considerations, including contiguity. Public higher education shall be a separate region.</li> <li>Dukes-Nantucket shall constitute an electoral district.</li> </ul>						

## **ONE PERSON ONE VOTE AND THE ELECTORAL PERCENTAGE TEST**

### **ONE PERSON ONE VOTE:**

*"Each affiliate shall apply the one person one vote principle for representation on its governing bodies. . ."*

- NEA Bylaw 8 7(a) and 8 11(a)

### **Definition**

One person one vote, or equal population voting, generally means that the vote of each member of the affiliate has the same weight as the vote of any other member. Equal population voting is contrasted with unit voting, where units (towns, villages, cities, counties) are represented without reference to population variance that might be present from one unit to another. The U.S. Senate is organized on a unit basis and the House on an equal population (one person one vote) basis.

It should be noted that the association shall apply the one person one vote principle for representation on each of its several governing bodies. "Elected governing body" is any association elected body participating in the determination of general and significant policies and in the exercise of discretion in implementing such policies. Representative or delegate assemblies, boards of directors, and/or executive committees generally are characterized as governing bodies.

### **ELECTORAL PERCENTAGE TEST**

#### ***Ascertaining Conformity to One Person One Vote***

#### **Procedure**

The electoral percentage is a calculation to determine whether the smallest voting membership units representing 50.1% of the members are represented by a bare majority (50.1%) of an affiliate's governing body.

First, compute a bare majority as a percentage of the governing body using one half of the governing body plus one. Then determine how many members each elected representative represents; this is the voting district size. If the district is represented by more than one representative, divide the members of that district by the number of representatives to determine the number of members each one represents.

The next step is to list all the representatives and number of members represented in order from the smallest to the largest by voting district size. Find the sum of the smallest

constituencies electing the bare majority and determine what percentage that represents of the total membership of the affiliate.

To meet the test, the resulting percentage should not deviate more than 5% from the bare majority, it must therefore fall between 45.1% and 55%.

*Example:*

This hypothetical example is based on an association governing body of eight members, each representing members in a geographical district; the total membership is 11,730.

<u>Districts</u>	<u>Number of Members</u>	<u>Number of Directors</u>	<u>Voting District Size</u>
#2A	580	1	580
#3B	1,050	1	1,050
#4C	1,150	1	1,150
#5D	1,200	1	1,200
#6E	1,550	1	1,550
			(5,530 members = 47.1% of total membership)
#7F	1,600	1	1,600
#8G	2,200	1	2,200
#9H	2,400	1	2,400
		8 (Total Governing Board Members)	11,730 (Total Membership)

In the above example, a bare majority of the governing board (half of the total members plus 1) is representing 47.1% of the total membership (after the districts have been arranged in ascending order by voting district size). Therefore, the electoral district plan in this hypothetical example meets the electoral percentage test, because the electoral percentage does not deviate more than 5% from a bare majority of 50.1%.



A DIVERSE UNION  
*of* EDUCATION  
WORKERS

EXECUTIVE COMMITTEE

**Proposed Operating Budget  
FY 2025-2026**

Presented to  
THE BOARD OF DIRECTORS

March 28, 2025



**MTA FY2025-2026  
EXECUTIVE COMMITTEE  
PROPOSED OPERATING BUDGET  
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**Legend for Committee and Bargaining Unit Acronyms:**

ABC – Advisory Budget Committee	MTASO – Massachusetts Teachers Association Staff Organization
EC – Executive Committee	MATA – Massachusetts Association of Teacher Attorneys
BOD – Board of Directors	FSO – Field Services Organization



# SECTION 1



A DIVERSE UNION  
*of* EDUCATION  
WORKERS





**A DIVERSE UNION  
of EDUCATION  
WORKERS**

To: MTA Board of Directors

From: MTA Executive Committee

Date: March 1, 2025

Re: FY 2025-2026 Proposed Operating Budget

The MTA Executive Committee (EC) reviewed the Proposed Operating Budget for fiscal year 2025-2026. The EC:

VOTED to recommend to the MTA Board of Directors the adoption of the Annual Operating Budget of \$58,692,057 and an Operating Budget dues level of \$550, based on 92,243 full-time equivalent active members for the 2025-2026 fiscal year. Dues for clerical staff and custodians are to be \$330; dues for paraeducators, food service personnel and other Education Support Professionals are to be \$165. Retiree annual dues remain at \$30 per the MTA Bylaws.

The following includes detailed analyses of the Proposed Annual Operating Budget for Fiscal Year 2025-2026.

Max Page, President  
Deb McCarthy, Vice President  
Mike Fadel, Executive Director-Treasurer





Date: March 1, 2025

Max Page, President  
Deb McCarthy, Vice President  
Mike Fadel, Executive Director-Treasurer

To: MTA Board of Directors

From: Deb McCarthy  
Vice President and Chair of the Advisory Budget Committee

Re: FY 2025-2026 Budget Recommendation

**Executive Committee Operating Budget Recommendation to the MTA Board of Directors**

The MTA Executive Committee (EC) recommends to the MTA Board of Directors an operating budget for Fiscal Year 2025-2026 based on the following projected revenues and expenses.

	25-26 Budget	24-25 Budget	Incr. (Decr.)	% Incr. (Decr.)
Membership Dues	\$ 550.00	\$ 536.00	\$ 14.00	2.6%
FTEs	92,243	92,243	0	0.0%
Affiliation dues	\$ 50,733,649	\$ 49,442,084	\$ 1,291,565	2.6%
Other revenue	\$ 7,958,408	\$ 7,102,811	\$ 855,597	12.1%
Total revenue	\$ 58,692,057	\$ 56,544,895	\$ 2,147,162	3.8%
Program expenses	\$ 10,213,066	\$ 9,461,922	\$ 751,144	7.6%
Non-program expenses	\$ 48,478,991	\$ 47,082,973	\$ 1,396,018	3.0%
Total expenses	\$ 58,692,057	\$ 56,544,895	\$ 2,147,162	3.8%

**ABC's Budget Process**

The committee completed a comprehensive review of the budget developed by MTA's Executive Director-Treasurer (EDT) and Division Directors. Over the course of several meetings, the ABC walked through every line item in the budget to make sure any questions or clarifications were addressed and, in some cases, adjusted. Please see the attached memo from the EDT to the ABC for a review of budget priorities set by the Board of Directors in the fall of 2024 and some highlights for projected revenue and expenses that have a



noteworthy variance over the FY25 budgeted amount.

### **Recommended Dues Increase**

The EC is recommending a dues increase of \$14, for a dues level of \$550, based on 92,243 full-time equivalent, active members for the 2025-2026 fiscal year. Dues for members in the category of secretaries, clerks and custodians are to be \$330; dues for aides, food service personnel and other Education Support Professionals would be \$165.

This budget is built on the same full-time equivalent count that the 2024-25 budget was forecasted on. MTA's membership growth was set back by layoffs in many districts last year and an assumption in building this year's budget is that by June 30, 2026, MTA membership should rise to the projected levels for June 30, 2024.

Over the last 30 years, MTA's dues have sometimes been frozen and sometimes increased by as much as 8% in one year. Overall, the average dues increase was 2.6%.

The proposed dues increase of 2.6% to the 2025-26 budget will meet the demands to increase staffing in our legal department, our division of training and professional learning, our communications division, along with addressing the increased need for staff in our accounting department. Additionally, the increased revenue will be used to invest in organizing local contract campaigns, toward the Community School and Safe Schools campaigns, the fight for living wages PreK through 16, the right to retirement security, and the fights for fair school financing in all our public school buildings and colleges.

Other enhancements to the budget that align to the priorities in the strategic Blueprint of the MTA include actions that modernize membership data systems, recruit Black educators, increase leadership and activism, and strengthen regional solidarity networks. The proposed budget substantially increases grant programs for All In Grants, New Member Welcome Grants, Bargaining Crisis and Higher Ed Negotiations, while increasing monies for special organizing projects such as ALANA initiatives and the Living Wage Campaign. It contains an increased line item for AFL-CIO membership dues to support partnership and increase solidarity strength around local campaign elections.

I want to take this opportunity to thank all the members of the Advisory Budget Committee for devoting their time and effort in preparing the budget. The committee members are:

Max Page, President and Member Ex-Officio  
Deb McCarthy, Vice President and ABC Chair  
Cynthia Roy, Executive Committee Member, Bristol-Plymouth  
Barry Davis, Executive Committee Member, Haverhill  
Sue Doherty, Retired Member At-Large, Quincy  
Sarah McLaughlin, Member At-Large, Melrose  
Joanna Gonsalves, Member At-Large, MSCA  
Nellie Taylor, Member At-Large, PSU  
Chris Mulroney, Member At-Large, Framingham  
Kelsey Romano, Member At-Large, Berkshire Hills  
Mike Fadel, Executive Director-Treasurer  
Beth Evers, Chief Financial Officer  
Ann Maguire, Controller  
Nancy Shukan, Assistant Controller



# SECTION 2



A DIVERSE UNION  
*of* EDUCATION  
WORKERS





**A DIVERSE UNION  
of EDUCATION  
WORKERS**

Date: January 27, 2025

To: Advisory Budget Committee

From: Mike Fadel

Re: Proposed 2025-2026 MTA Budget

Max Page, President

Deb McCarthy, Vice President

Mike Fadel, Executive Director-Treasurer

Enclosed please find the Fiscal Year 2025-2026 (FY26) management budget proposal. This budget builds on the significant investments in MTA staff and programs that the Annual Meeting has voted to support over the last several years. This budget is built on the assumption of no increase in overall MTA membership. Membership growth was set back by layoffs and unfilled vacancies in many districts last year and this year. It will require an expanded membership campaign to achieve the projected FTE levels. This proposal includes a \$14 annual dues increase for full-time equivalent active members; \$8.25 annual dues increase for secretaries/clerks and custodians; and a \$4 annual dues increase for paraprofessionals, food service personnel and all other Education Support Professionals.

	2025-26 Budget Proposal	2024-25 Budget	Increase	% Increase
Full-time Active Dues	\$550	\$536	\$14	2.6%
Secretaries/Clerks/Custodians Dues	\$330	\$321.75	\$8.25	2.6%
Paraprofessionals, food service, and all other ESP dues	\$165	\$161	\$4	2.5%
FTEs	92,243	92,243	0	0
Total Dues	\$50,773,649	\$49,442,084	\$1,291,565	2.6%
Program & Other Revenue	7,958,408	7,102,811	\$855,597	12%
Total Operating Revenue	58,692,057	56,544,895	2,147,162	3.8%
Total Expenses	\$58,672,849	\$56,544,895	\$2,127,954	3.8%
Net Income (Loss)	\$19,208	0	\$19,208	0

What follows in this memo is a further explanation of some key components of the management proposal to assist you with your work on the budget.

## Budget Priorities

Our budget planning is broadly guided by the Blueprint Strategic Priorities that were adopted by the Board of Directors in March 2020. Each year, the Board also sets specific budget priorities for that year. The annual budget needs to advance the overall goals set forth in the Blueprint and the specific annual priorities adopted by the Board. In the fall of 2024, the MTA Board of Directors voted to adopt the following budget priorities:

- 1) Continue to implement the recommendations of the Blueprint report and provide locals with the resources and support needed to grow their power and effectiveness in advancing the five Blueprint strategic priorities: 1) connect members to the life of the union; 2) cultivate and support leadership at all levels of the union; 3) maximize bargaining power; 4) advance policy solutions and campaigns; 5) lead on economic, social and racial justice;
- 2) Preserve and grow the rank-and-file power of our union by establishing robust MTA systems for membership tracking and analysis and by assisting locals to establish strong systems for membership sign-up, data collection, tracking and retention, with special attention to signing up current non-members;
- 3) Support legislative and political campaigns to secure funding for public education, preK through higher education, work toward universal, publicly funded early education and child care, end the high-stakes testing regime, diversify our education workforce, win a statewide minimum pay for ESP members, win pay equity for public higher education employees in the three segments of public higher education, win paid family medical leave at least equal to the Massachusetts PFML law for all public school educators in the state, improve dignity and security for our retired members, promote the community schools model, protect and advance our members' right to strike, protect and enhance our members' right to work in physically safe and healthy workplaces, and advance our broader, common good demands;
- 4) Ensure that the MTA is a leading voice for public education, labor rights and broader racial and economic justice in the Legislature and at the ballot through programs that empower members as participants in their union and in the political process;
- 5) Implement organization-wide programs for members and staff that cultivate an inclusive and activist culture rooted in social, racial, gender and economic justice, and provide programmatic and organizing support to members of color;
- 6) Strengthen local associations, regional networks and bargaining councils that build solidarity and coordinate bargaining and issue campaigns by region;
- 7) Advance the statewide campaign around the PreK-12 ESP Bill of Rights, the Classified Staff Bill of Rights and the Adjunct Bill of Rights to win living wages, better working conditions and respect for ESPs and adjunct faculty;

- 8) Provide leadership, professional and membership development programs to active, retired and student members;
- 9) Advocate for a fair and secure retirement for our retired members, including at the federal level with the WEP/GPO fight, and engage retirees in broader advocacy efforts for public education;
- 10) Protect the future financial stability of the Massachusetts Teachers Association by conducting regular assessments of membership trends, maintaining strong reserves, and meeting contractual obligations to MTA employees by adequately funding the pension fund and post-retirement health benefits.

These budget priorities guided and informed the deliberations of the management team as we developed this budget proposal.

## **Revenue**

Over the last 30 years, MTA's dues have increased by as much as 8% in some years while in other years there has been no increase. Overall, the year-over-year average dues increase has been 2.6%. This year's proposed 2.6% increase in dues is very much in line with the historical average.

Additionally, because of the added field staff approved at the 2024 Annual Meeting, MTA is eligible for a substantial increase in NEA funding (revenue line 2) to defray some of those salary costs.

## **Expenses**

Over the last four years there has been a significant investment in increasing the numbers of field staff, especially field reps, organizers, the bargaining campaign strategy team, and community/political organizing team. Additionally, there has been an increase in the number of member organizer positions including Senate District Coordinators and Summer Member Organizers. This growth has enabled locals to build strong regional networks and bargaining councils, expand their contract campaigns, and increase their local political engagement including Proposition 2½ overrides and voting anti-educator officials out of office.

Now, there is a growing need for support in other divisions. This budget meets those needs by adding an attorney and an administrative assistant to the legal division, adding a community schools strategist/organizer to the TPL division, adding a communications specialist to the communications division, and adding an administrative position for payroll to the finance and accounting division. These added positions will play a key role in advancing the Board's priorities.

This budget supports contractual raises of 3% along with inflationary increases in benefit costs. Almost all of MTA's purchased services and supplies, including conference and meeting costs, continue to rise. However, this budget includes some meaningful cost reductions. The staff pension (line 6) remains well funded and the proposed reduced contribution still targets maintaining its fully funded status. We are reducing our rent and utility costs (lines 19 and 21) by consolidating our Quincy space and negotiating a reduced lease rate for a three-year extension.

The dues increase and other expense reductions allow for a large increase in state and local organizing (line 26), which supports grants to locals along with local and statewide initiatives. An increase in the large locals (line 28) budget will allow for more participation in these meetings by large local presidents who do not have release time provisions. Lastly, more locals have received support from their Central Labor Councils and want to participate in those councils and so the AFL-CIO dues allocation (line 81) has been increased.

### **Looking Ahead**

The new administration in Washington, D.C. has only been in place for one week, but already is taking steps to implement the Project 2025 playbook. We don't yet know the extent of the challenges and threats to public education and the common good which will be forthcoming. But we do know that the same organizational strength which MTA locals and members have gained over the last few years through organizing campaigns across the state will need to be exercised even more in the months and years ahead. This budget provides the resources for those fights and the ongoing work of the MTA. I look forward to working with you to defend public education in preK through higher ed and to continue to advance our organizational goals of racial, social and economic justice.

# SECTION 3



A DIVERSE UNION  
*of* EDUCATION  
WORKERS





**A DIVERSE UNION  
of EDUCATION  
WORKERS**

To: MTA Board of Directors

Max Page, President

Deb McCarthy, Vice President

Mike Fadel, Executive Director-Treasurer

From: MTA Executive Committee

Date: March 1, 2025

Re: FY 2025-2026 Proposed Public Relations/Organizing Campaign Budget

The MTA Executive Committee (EC) reviewed the Proposed Public Relations/Organizing Campaign budget for the fiscal year 2025-2026. The EC:

VOTED to recommend to the MTA Board of Directors the adoption of the Annual Public Relations/Organizing Campaign budget of \$1,844,860 and a Public Relations/Organizing Campaign dues level of \$20, based on 92,243 full-time equivalent active members for the 2025-2026 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.

The following includes detailed analyses of the proposed Annual Public Relations/Organizing Campaign budget for fiscal year 2025-2026.





**A DIVERSE UNION  
of EDUCATION  
WORKERS**

# MTA Public Relations & Organizing Campaign Committee Report

**March 2025**

The Public Relations/Organizing Campaign Committee (PR/O) is a crucial force for promoting the MTA’s public image, facilitating internal and external organizing, and positioning our members as the collective voice of public education at both the local and statewide levels. During fiscal year 2024-2025, PR/O funds aided locals in winning strong contracts that will improve conditions for educators and students, helped campaign allies on a range of social justice issues aligned with our union values, assisted MTA and our allies in ensuring that the billions of dollars for public education and transportation won through our Fair Share Victory are being allocated and distributed fairly, and funded impactful events such as Team Harmony’s Massachusetts Youth Leadership Institute. PR/O funds also helped drive our crucial campaigns, including our hard-won victory to replace the MCAS graduation requirement in November 2024.

**MAX PAGE**  
President

**DEB MCCARTHY**  
Vice President

**MIKE FADEL**  
Executive Director-  
Treasurer

The Yes on Question 2 campaign to replace the MCAS high school graduation requirement was the biggest focus for MTA through November 2024, and PR/O funds helped propel this crucial win for Massachusetts schools, students and educators. PR/O funded paid advertising to compel voters to vote yes on 2, print collateral for the general public and members including signage, stickers and postcards, earned media to raise awareness and support for the ballot campaign, and paid and organic social media.

PR/O funds were also used, following the November 2024 victory, to finance our 2025 legislative priorities, including protecting our Q2 win, organizing and building member power to drive preK-16 funding, fighting against our schools’ fiscal crises, and launching strategic media and social media efforts to build legislative support. Further, PR/O funds were used to continue funding the MTA History Project. The history project has made great strides in preserving our union’s rich history, including developing a comprehensive and visual history page on MTA’s website [massteacher.org](http://massteacher.org); developing an interactive display for the 2025 annual meeting; and curating key materials for a timeline of strikes throughout the MTA’s 180-year history.

The Yes on 2, legislative priorities and history project efforts are reflected by the allocations approved by the committee. The largest funds approved were up to \$750,000 for the Yes on 2 campaign, building off of the \$1.25 million from

**HEADQUARTERS**  
2 Heritage Drive, 8<sup>th</sup> Floor  
Quincy, MA 02171-2119

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800-392-6175  
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[massteacher.org](http://massteacher.org)

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**A DIVERSE UNION  
of EDUCATION  
WORKERS**

**MAX PAGE**

President

**DEB MCCARTHY**

Vice President

**MIKE FADEL**

Executive Director-  
Treasurer

the previous year for the signature-gathering stage of the campaign. Other funds included up to \$200,000 to support MassBudget, a nonprofit closely aligned with MTA’s priorities; \$85,000 for the Massachusetts Consortium for Innovative Education Assessment/Education Commonwealth Project (MCEIA/ECP) for continued funding aimed at developing more valid, equitable and democratic accountability assessment measures; up to \$30,000 for Raise Up Massachusetts (RUM) for organizing efforts to protect and implement historic tax reform and education investments in Mass. won through the Fair Share victory; and up to \$35,000 for Raising Multicultural Kids to fund the salary of a new Program Director to support the organization’s mission of bringing diversity programs to school districts throughout Massachusetts. Through PR/O expenditures, the MTA has maintained our presence on public television and many other forms of media. The committee has again provided sponsorship to High School Quiz Show on GBH and, in collaboration with Westfield State University, is playing a lead advertising role in funding As Schools Match Wits on WGBY. These programs raise our profile and use public service messaging to reach parents, students and community leaders. Meanwhile, the local Public Relations/Organizing Grant program is still going strong, helping support membership engagement and contract action activities by funding union-branded t-shirts, signage and other materials, as well as member events, which are important for maintaining a united membership base that is activated to win the best contracts and the best schools for students. In fiscal 2024, PR/O funded 41 local grants at a total amount of just over \$290,000 to date.

The PR/Organizing fund remains a vital part of building MTA power in the face of the right-wing’s relentless desire to destroy unions and undermine both public education and democracy. The fund has been key to our successes for more than two decades now – and if it is reauthorized for 2025-2026, it will continue to serve our union well, which is more important than ever as our country veers into authoritarianism under the Trump administration. I would like to thank the members of the committee for their work and dedication. The following members and staff currently serve on or assist the committee:

**HEADQUARTERS**

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

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- Deb McCarthy – MTA Vice President
- Conner Bourgoin - Tewksbury Teachers Assn.
- Benjamin Just – Gateway Education Assn.
- Bob Erlandsen – Cohasset Teachers Assn.
- Amy Morin – Lexington Education Assn.
- Nicholas Rand – Andover Education Assn.
- Mike Schlegelmilch – Newton Teachers Assn.



**A DIVERSE UNION  
of EDUCATION  
WORKERS**

Dayshawn Simmons – Somerville Educators Union  
(Gary) Lee Burgess – Springfield Education Assn.  
Mike Fadel – MTA Executive Director-Treasurer  
Laura Mullen – MTA Communications Division Staff Assistant  
Amanda Torres-Price – PR/O Co-Chair and MTA Director of Communications

Thank you,

MAX PAGE  
MTA President and  
PR/Organizing Campaign Committee Co-Chair

**MAX PAGE**  
President

**DEB MCCARTHY**  
Vice President

**MIKE FADEL**  
Executive Director-  
Treasurer

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# SECTION 4





MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026  
OPERATING BUDGET  
DETAIL BUDGET BY LINE ITEM

LN REF	APPROVED 2023-2024 BUDGET	2023-2024 ACTUAL	APPROVED 2024-2025 BUDGET	EXECUTIVE COMMITTEE 2025-2026 BUDGET	INCREASE (DECREASE) FROM FY 25	PERCENT INCR/(DECR) FROM FY 25
<b>R E V E N U E</b>						
	<b>MEMBERSHIP DUES</b>					
	\$503.00	\$503.00	\$536.00	\$550.00	14	2.61%
	91,110	90,673	92,243	92,243	0	0.00%
1	45,828,330	45,449,297	49,442,084	50,733,649	1,291,565	2.61%
	45,828,330	45,449,297	49,442,084	50,733,649	1,291,565	2.61%
	<b>TOTAL MEMBERSHIP DUES</b>					
	<b>PROGRAM REVENUE</b>					
2	2,614,508	2,730,634	2,923,220	3,433,793	510,573	17.47%
3	222,296	284,691	312,855	235,815	(77,040)	-24.62%
4	75,000	456,444	225,000	225,000	0	0.00%
5	1,600,000	1,327,697	1,600,000	1,600,000	0	0.00%
6	20,000	6,688	20,000	10,000	(10,000)	-50.00%
7	21,000	6,439	21,000	5,000	(16,000)	-76.19%
8	24,150	37,644	24,150	15,000	(9,150)	-37.89%
9	60,000	60,131	60,000	60,000	0	0.00%
10	20,000	20,481	20,000	21,000	1,000	5.00%
11	40,000	42,250	40,000	40,000	0	0.00%
12	50,000	93,550	50,000	94,000	44,000	88.00%
13	600	0	500	0	(600)	-100.00%
	4,747,554	5,066,649	5,296,825	5,739,608	442,783	8.36%
	<b>Total Program Revenue</b>					
	<b>OTHER INCOME</b>					
14	1,274,641	2,548,780	1,442,986	1,820,000	377,014	26.13%
15	171,000	144,906	163,000	158,800	(4,200)	-2.58%
16	200,000	244,740	200,000	240,000	40,000	20.00%
	1,645,641	2,938,426	1,805,986	2,218,800	412,814	22.86%
	<b>Total Other Income</b>					
	52,221,525	53,454,372	56,544,895	58,692,057	2,147,162	3.80%
	<b>TOTAL OPERATING REVENUE</b>					

MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026  
OPERATING BUDGET  
DETAIL BUDGET BY LINE ITEM

LN REF	APPROVED 2023-2024 BUDGET	2023-2024 ACTUAL	APPROVED 2024-2025 BUDGET	EXECUTIVE COMMITTEE 2025-2026 BUDGET	INCREASE (DECREASE) FROM FY 25	PERCENT INCR/(DECR) FROM FY 25
<b>EXPENSES</b>						
<b>SALARIES &amp; FRINGE BENEFITS</b>						
1	17,387,069	17,938,499	19,458,346	22,143,499	2,685,153	13.80%
2	4,130,466	4,224,402	4,603,918	4,951,103	347,185	7.54%
3	627,500	581,268	740,000	740,000	0	0.00%
4	173,000	339,708	173,000	265,500	92,500	53.47%
5	1,654,725	1,736,882	1,925,964	2,088,908	162,944	8.46%
6	6,390,127	1,264,486	6,287,091	6,018,624	(268,467)	-4.27%
7	4,053,776	4,060,170	5,135,342	5,402,973	267,631	5.21%
8	400,000	815,313	422,793	422,797	4	0.00%
9	119,090	108,979	133,402	117,481	(15,921)	-11.93%
10	181,864	262,270	240,145	225,912	(14,233)	-5.93%
11	90,332	102,064	92,564	81,059	(11,505)	-12.43%
12	25,001	36,319	29,315	28,004	(1,311)	-4.47%
	35,232,951	31,470,360	39,241,880	42,485,859	3,243,979	8.27%
<b>CONTRACTED ADMINISTRATIVE SERVICES &amp; PROFESSIONAL FEES</b>						
13	200,000	542,369	200,000	282,000	82,000	41.00%
14	60,000	91,300	90,000	90,000	0	0.00%
15	204,664	223,753	230,000	209,208	(20,792)	-9.04%
16	70,000	75,447	120,000	120,000	0	0.00%
17	125,000	59,915	100,000	100,000	0	0.00%
	659,664	1,123,475	740,000	801,208	61,208	8.27%

MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026  
OPERATING BUDGET  
DETAIL BUDGET BY LINE ITEM

LN REF	APPROVED 2023-2024 BUDGET	2023-2024 ACTUAL	APPROVED 2024-2025 BUDGET	EXECUTIVE COMMITTEE 2025-2026 BUDGET	INCREASE (DECREASE) FROM FY 25	PERCENT INCR/(DECR) FROM FY 25
	200,000	223,518	150,000	150,000	0	0.00%
	1,788,646	1,743,092	1,831,689	1,678,138	(153,551)	-8.38%
	44,128	36,555	53,635	36,555	(17,080)	-31.84%
	<u>264,945</u>	<u>339,433</u>	<u>429,850</u>	<u>311,228</u>	<u>(118,622)</u>	<u>-27.60%</u>
	2,297,719	2,342,598	2,465,174	2,175,921	(289,253)	-11.73%
	234,996	255,827	234,996	257,346	22,350	9.51%
	215,012	441,488	215,012	396,915	181,903	84.60%
	52,000	42,184	0	45,000	45,000	100.00%
	<u>22,000</u>	<u>15,540</u>	<u>0</u>	<u>20,000</u>	<u>20,000</u>	<u>100.00%</u>
	524,008	755,039	450,008	719,261	269,253	59.83%

**FACILITIES & TELEPHONE**

- 18 Telephone
- 19 Rent
- 20 Janitorial Supplies/Services
- 21 Utilities and Operating Expenses - Leaseholds

Total Facilities & Telephone

**BUSINESS EXPENSES**

- 22 Travel - Mileage
- 23 Travel - Other
- 24 Travel and Residence - President's Expenses
- 25 Travel and Residence - Vice President's Expenses

Total Business Expenses

MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026  
OPERATING BUDGET  
DETAIL BUDGET BY LINE ITEM

LN REF	APPROVED 2023-2024 BUDGET	2023-2024 ACTUAL	APPROVED 2024-2025 BUDGET	EXECUTIVE COMMITTEE 2025-2026 BUDGET	INCREASE (DECREASE) FROM FY 25	PERCENT INCR/(DECR) FROM FY 25
<b>PROGRAM EXPENSES</b>						
	<b>Field &amp; Organizing</b>					
26	425,000	584,917	425,000	750,000	325,000	76.47%
27	35,000	14,678	35,000	35,000	0	0.00%
28	14,773	12,948	14,773	24,773	10,000	67.69%
29	40,000	2,600	10,000	5,000	(5,000)	-50.00%
30	90,000	73,344	90,000	75,000	(15,000)	-16.67%
31	1,850,000	1,636,154	1,800,000	1,800,000	0	0.00%
32	100,000	117,868	100,000	100,000	0	0.00%
33	50,000	110,653	50,000	125,000	75,000	150.00%
34	5,000	0	0	5,000	5,000	100.00%
35	25,000	42,023	25,000	25,000	0	0.00%
36	10,000	13,830	10,000	15,000	5,000	50.00%
37	21,600	21,000	32,000	32,000	0	0.00%
	2,666,373	2,703,375	2,591,773	2,991,773	400,000	15.43%
	<b>Sub-Total Field &amp; Organizing</b>					
	<b>Training and Professional Learning</b>					
38	98,000	99,103	175,000	350,000	175,000	100.00%
39	78,000	109,091	85,800	150,000	64,200	74.83%
40	360,000	283,802	300,000	330,000	30,000	10.00%
41	141,000	79,125	141,000	100,000	(41,000)	-29.08%
42	47,730	34,984	52,503	40,000	(12,503)	-23.81%
43	47,730	86,611	52,503	90,000	37,497	71.42%
44	22,000	10,993	24,200	15,000	(9,200)	-38.02%
45	67,000	47,004	73,700	55,000	(18,700)	-25.37%
46	115,100	117,242	126,610	139,300	12,690	10.02%
47	73,000	8,935	80,300	40,000	(40,300)	-50.19%
48	36,000	23,270	39,600	43,500	3,900	9.85%
	1,085,560	914,915	1,151,216	1,352,800	201,584	17.51%
	<b>Sub-Total Training and Professional Learning</b>					

MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026  
OPERATING BUDGET  
DETAIL BUDGET BY LINE ITEM

LN REF	APPROVED 2023-2024 BUDGET	2023-2024 ACTUAL	APPROVED 2024-2025 BUDGET	EXECUTIVE COMMITTEE 2025-2026 BUDGET	INCREASE (DECREASE) FROM FY 25	PERCENT INCR/(DECR) FROM FY 25
	77,978	12,600	35,000	35,000	0	0.00%
	0	129	15,000	10,000	(5,000)	-33.33%
	5,000	936	0	5,000	5,000	100.00%
	335,000	497,602	275,000	395,000	120,000	43.64%
	14,999	10,150	14,999	14,999	0	0.00%
	25,000	13,655	25,000	25,000	0	0.00%
	225,000	77,581	225,000	225,000	0	0.00%
	44,500	2,360	54,500	54,500	0	0.00%
	<u>30,000</u>	<u>0</u>	<u>30,000</u>	<u>30,000</u>	<u>0</u>	<u>0.00%</u>
	942,477	2,216,735	674,499	794,499	120,000	17.79%

Legislation, Policy and Political Action  
 49 Local Grants / Political Action Leaders  
 50 Regional Team Organizing Expenses  
 51 State Conventions  
 52 Local, State and Federal Elections & Issues<sup>1</sup>  
 53 VOTE - Political Contributions  
 54 Legislative Materials and Fees  
 55 State Budget / Issues Activities / Polling  
 56 Policy Development, Research and Monitoring  
 57 Higher Education Research & Policy  
 Sub-Total Legislation, Policy and Political Action

<sup>1</sup>Unexpended funds in Line 52 are restricted in non election years for use in the next election year.

	120,000	54,857	100,000	100,000	0	0.00%
	167,400	118,557	120,000	120,000	0	0.00%
	<u>165,000</u>	<u>157,522</u>	<u>165,000</u>	<u>165,000</u>	<u>0</u>	<u>0.00%</u>
	452,400	330,936	385,000	385,000	0	0.00%
	160,000	72,242	140,000	120,000	(20,000)	-14.29%
	2,260,000	2,491,852	2,060,000	2,060,000	0	0.00%
	<u>300,000</u>	<u>329,104</u>	<u>300,000</u>	<u>300,000</u>	<u>0</u>	<u>0.00%</u>
	2,720,000	2,893,198	2,500,000	2,480,000	(20,000)	-0.80%

Communications  
 58 Media/Policy Priorities  
 59 MTA Today  
 60 Website/Digital Communications  
 Sub-Total Communications  
 Legal Services  
 61 Auxiliary Support (Filing/Transcript Fees)/Experts  
 62 Outside Attorney Fees - Legal  
 63 Outside Attorney Fees - Workers Comp  
 Sub-Total Legal Services



MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026  
OPERATING BUDGET  
DETAIL BUDGET BY LINE ITEM

LN REF	APPROVED 2023-2024 BUDGET	2023-2024 ACTUAL	APPROVED 2024-2025 BUDGET	EXECUTIVE COMMITTEE 2025-2026 BUDGET	INCREASE (DECREASE) FROM FY 25	PERCENT INCR/(DECR) FROM FY 25
	<b>ADMINISTRATIVE EXPENSES</b>					
87	134,750	144,950	134,750	141,750	7,000	5.19%
88	181,900	379,856	219,000	320,800	101,800	46.48%
89	40,000	8,845	40,000	40,000	0	0.00%
90	28,000	33,566	28,000	33,600	5,600	20.00%
91	4,500	7,077	4,500	4,500	0	0.00%
92	272,000	373,740	361,500	410,000	48,500	13.42%
93	18,000	17,214	18,000	18,000	0	0.00%
94	10,700	11,484	10,700	11,500	800	7.48%
95	20,000	7,297	20,000	18,000	(2,000)	-10.00%
96	20,000	20,000	20,000	20,000	0	0.00%
97	130,000	154,425	145,000	145,000	0	0.00%
98	75,000	73,046	75,000	75,000	0	0.00%
99	21,542	67,169	21,542	67,000	45,458	211.02%
100	35,000	5,519	70,000	70,000	0	0.00%
101	125,000	132,725	125,000	100,600	(24,400)	-19.52%
102	50,000	90,784	65,000	65,000	0	0.00%
	1,166,392	1,527,697	1,357,992	1,540,750	182,758	13.46%
	49,805,409	48,213,964	53,716,976	57,936,065	4,219,089	7.85%
	<b>TOTAL EXPENSES BEFORE CONTINGENCY</b>					
103	400,000	613,165	400,000	400,000	0	0.00%
104	809,686	0	334,047	265,992	(68,055)	-20.37%
105	0	0	0	0	0	0.00%
106	22,000	171,878	30,000	90,000	60,000	200.00%
107	1,184,430	0	2,063,872	0	(2,063,872)	-100.00%
	52,221,525	48,999,007	56,544,895	58,692,057	2,147,162	3.80%
	0	4,455,365	0	0	0	(0)
	<b>NET INCOME/(LOSS)</b>					



# SECTION 5





MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026  
OPERATING BUDGET  
DETAIL PROGRAM BUDGET BY LINE ITEM

LN REF	REVENUE	FIELD & ORGANIZING	TRAINING AND PROFESSIONAL LEARNING	LEGISLATION, POLICY AND POLITICAL ACTION	COMM. DIVISION	LEGAL SERVICES	GOVERNANCE & ADMIN	HUMAN RESOURCES	FINANCE & ACCOUNTING	ITS	PRINTING & MAILING
	<b>MEMBERSHIP DUES</b>										
	Full Time Equivalents										
1	Affiliation Dues	21,463,771	3,736,165	4,694,097	2,734,855	5,674,390	5,473,962	1,305,639	3,616,357	1,237,553	796,860
	<b>TOTAL MEMBERSHIP DUES</b>	21,463,771	3,736,165	4,694,097	2,734,855	5,674,390	5,473,962	1,305,639	3,616,357	1,237,553	796,860
	<b>PROGRAM REVENUE</b>										
2	NEA UniServ Funding - Full time	3,433,793	0	0	0	0	0	0	0	0	0
3	NEA UniServ Funding - Part time	235,815	0	0	0	0	0	0	0	0	0
4	NEA Funds - Project/Grant Revenue	225,000	0	0	0	1,600,000	0	0	0	0	0
5	NEA Legal Reimbursement	0	0	0	0	10,000	0	0	0	0	0
6	Insurance & Court Reimbursement of Attorney's Fees	0	0	0	0	0	0	0	0	0	0
7	Conference/Workshop Revenue	0	5,000	0	0	0	0	0	0	0	0
8	Summer Conference Revenue	0	15,000	0	0	0	0	0	0	0	0
9	Workers Compensation Reimbursement	0	0	0	0	60,000	0	0	0	0	0
10	Annual Meeting Revenue	0	0	0	0	0	21,000	0	0	0	0
11	Newspaper Advertising	0	0	0	40,000	0	0	0	0	0	0
12	Printing Income	0	0	0	0	0	0	0	0	0	94,000
13	Human & Civil Rights Event Revenue	0	0	0	0	0	0	0	0	0	0
	<b>Total Program Revenue</b>	3,894,608	20,000	0	40,000	1,670,000	21,000	0	0	0	94,000
	<b>OTHER INCOME</b>										
14	Interest and Dividend Income	0	0	0	0	0	0	0	1,820,000	0	0
15	MTA Benefits / Miscellaneous Income	0	0	0	0	0	0	0	158,800	0	0
16	Property & Casualty Endorsement and Royalty Income	0	0	0	0	0	0	0	240,000	0	0
	<b>Total Other Income</b>	0	0	0	0	0	0	0	2,218,800	0	0
	<b>TOTAL OPERATING REVENUE</b>	25,358,379	3,756,165	4,694,097	2,774,855	7,344,390	5,494,962	1,305,639	5,835,157	1,237,553	890,860

MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026  
OPERATING BUDGET  
DETAIL PROGRAM BUDGET BY LINE ITEM

LN REF	FIELD & ORGANIZING	TRAINING AND PROFESSIONAL LEARNING	LEGISLATION, POLICY AND POLITICAL ACTION	COMM. DIVISION	LEGAL SERVICES	GOVERNANCE & ADMIN	HUMAN RESOURCES	FINANCE & ACCOUNTING	ITS	PRINTING & MAILING	
	<b>EXPENSES</b>										
	<b>SALARIES &amp; FRINGE BENEFITS</b>										
1	13,367,020	814,718	1,714,267	1,315,762	2,350,639	987,892	616,753	793,973	182,475	0	
2	1,592,028	555,411	280,831	186,924	611,199	253,342	0	923,058	205,894	342,416	
3	115,000	0	450,000	0	175,000	0	0	0	0	0	
4	7,000	100,000	4,500	6,000	11,000	44,000	0	89,000	0	4,000	
5	1,140,421	111,803	186,528	114,485	222,891	75,190	45,464	136,310	29,314	26,502	
6	3,347,446	312,870	456,150	342,878	674,536	189,387	141,011	391,699	88,795	73,852	
7	2,785,079	379,793	476,707	337,698	538,418	225,941	53,950	470,562	34,407	100,418	
8	227,479	23,821	33,347	23,820	42,878	11,907	9,528	33,343	7,146	9,528	
9	64,263	6,010	8,744	6,590	12,985	5,444	2,704	7,533	1,705	1,503	
10	123,681	11,562	16,839	12,679	24,985	10,333	5,205	14,473	3,277	2,878	
11	35,947	3,430	16,539	3,430	10,739	2,399	1,372	4,802	1,029	1,372	
12	15,499	1,447	2,112	1,589	3,118	1,038	552	1,797	411	341	
	22,820,863	2,320,865	3,646,564	2,351,855	4,678,388	1,806,873	876,639	2,866,549	554,463	562,810	
	<b>CONTRACTED ADMINISTRATIVE SERVICES &amp; PROFESSIONAL FEES</b>										
13	75,000	0	0	0	0	25,000	117,000	30,000	35,000	0	
14	0	0	0	0	0	0	0	90,000	0	0	
15	0	0	0	0	0	0	0	209,208	0	0	
16	0	0	0	0	0	0	50,000	70,000	0	0	
17	0	0	0	0	0	100,000	0	0	0	0	
	75,000	0	0	0	0	125,000	167,000	399,208	35,000	0	

Total Contracted Administrative Services & Professional Fees

MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026  
OPERATING BUDGET  
DETAIL PROGRAM BUDGET BY LINE ITEM

LN REF	FIELD & ORGANIZING	TRAINING AND PROFESSIONAL LEARNING	LEGISLATION, POLICY AND POLITICAL ACTION	COMM. DIVISION	LEGAL SERVICES	GOVERNANCE & ADMIN	HUMAN RESOURCES	FINANCE & ACCOUNTING	ITS	PRINTING & MAILING
	<b>FACILITIES &amp; TELEPHONE</b>									
18	Telephone	0	3,500	0	0	0	0	0	121,000	0
19	Rent	0	170,584	0	0	922,918	0	0	0	0
20	Janitorial Supplies/Services	0	0	0	0	4,333	0	0	0	0
21	Utilities and Operating Expenses - Leaseholds	0	17,352	0	0	227,747	0	0	0	0
	<b>Total Facilities &amp; Telephone</b>	<b>0</b>	<b>191,436</b>	<b>0</b>	<b>0</b>	<b>1,154,998</b>	<b>0</b>	<b>0</b>	<b>121,000</b>	<b>0</b>
	<b>BUSINESS EXPENSES</b>									
22	Travel - Mileage	8,000	7,798	2,499	10,001	5,004	500	1,400	1,500	650
23	Travel - Other	18,000	35,000	18,001	64,001	43,001	1,000	4,500	4,000	14,400
24	Travel and Residence - President's Expenses	0	0	0	0	45,000	0	0	0	0
25	Travel and Residence - Vice President's Expenses	0	0	0	0	20,000	0	0	0	0
	<b>Total Business Expenses</b>	<b>26,000</b>	<b>42,798</b>	<b>20,500</b>	<b>74,002</b>	<b>113,005</b>	<b>1,500</b>	<b>5,900</b>	<b>5,500</b>	<b>15,050</b>

MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026  
OPERATING BUDGET  
DETAIL PROGRAM BUDGET BY LINE ITEM

LN REF	FIELD & ORGANIZING	TRAINING AND PROFESSIONAL LEARNING	LEGISLATION, POLICY AND POLITICAL ACTION	COMM. DIVISION	LEGAL SERVICES	GOVERNANCE & ADMIN	HUMAN RESOURCES	FINANCE & ACCOUNTING	ITS	PRINTING & MAILING	
	PROGRAM EXPENSES										
	Field & Organizing										
26	750,000	0	0	0	0	0	0	0	0	0	
27	35,000	0	0	0	0	0	0	0	0	0	
28	24,773	0	0	0	0	0	0	0	0	0	
29	5,000	0	0	0	0	0	0	0	0	0	
30	75,000	0	0	0	0	0	0	1,800,000	0	0	
31	0	0	0	0	0	0	0	0	0	0	
32	100,000	0	0	0	0	0	0	0	0	0	
33	125,000	0	0	0	0	0	0	0	0	0	
34	5,000	0	0	0	0	0	0	0	0	0	
35	25,000	0	0	0	0	0	0	0	0	0	
36	15,000	0	0	0	0	0	0	0	0	0	
37	32,000	0	0	0	0	0	0	0	0	0	
	1,191,773	0	0	0	0	0	0	1,800,000	0	0	
	Sub-Total Field & Organizing										
	Training and Professional Learning										
38	0	350,000	0	0	0	0	0	0	0	0	
39	0	150,000	0	0	0	0	0	0	0	0	
40	0	330,000	0	0	0	0	0	0	0	0	
41	0	100,000	0	0	0	0	0	0	0	0	
42	0	40,000	0	0	0	0	0	0	0	0	
43	0	90,000	0	0	0	0	0	0	0	0	
44	0	15,000	0	0	0	0	0	0	0	0	
45	0	55,000	0	0	0	0	0	0	0	0	
46	0	135,300	0	0	0	0	0	0	0	0	
47	0	40,000	0	0	0	0	0	0	0	0	
48	0	43,500	0	0	0	0	0	0	0	0	
	0	1,352,800	0	0	0	0	0	0	0	0	
	Sub-Total Training and Professional Learning										



MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026  
OPERATING BUDGET  
DETAIL PROGRAM BUDGET BY LINE ITEM

LN REF	FIELD & ORGANIZING	TRAINING AND PROFESSIONAL LEARNING	LEGISLATION, POLICY AND POLITICAL ACTION	COMM. DIVISION	LEGAL SERVICES	GOVERNANCE & ADMIN	HUMAN RESOURCES	FINANCE & ACCOUNTING	ITS	PRINTING & MAILING
	Governance & Administration									
64	Annual Meeting	0	0	0	0	465,000	0	0	0	0
65	Human Civil Rights Dinner & Awards	0	0	0	0	24,200	0	0	0	0
66	Board Meetings	0	0	0	0	212,960	0	0	0	0
67	Other Board Activities	0	0	0	0	48,400	0	0	0	0
68	Executive Committee Meetings	0	0	0	0	31,750	0	0	0	0
69	Other Executive Committee Activities	0	0	0	0	15,000	0	0	0	0
70	Local Presidents Meetings	0	0	0	0	49,000	0	0	0	0
71	President's Special Projects	0	0	0	0	8,800	0	0	0	0
72	National Conferences	0	0	0	0	30,250	0	0	0	0
73	Special Interest Conferences	0	0	0	0	30,250	0	0	0	0
74	NEA Delegate Stipends	0	0	0	0	286,500	0	0	0	0
75	NEA Convention Expenses	0	0	0	0	90,750	0	0	0	0
76	MTA & NEA Elections	0	0	0	0	58,134	0	0	0	0
77	Committees	0	0	0	0	150,000	0	0	0	0
78	Projects, Coalitions & Annual Donations	0	0	0	0	60,000	0	0	0	0
79	Discretionary Donations	0	0	0	0	70,000	0	0	0	0
80	Massachusetts Child Donation	0	0	0	0	20,000	0	0	0	0
81	AFL/CIO Membership Dues	0	0	0	0	300,000	0	0	0	0
	Sub-Total Governance & Administration	0	0	0	0	1,950,994	0	0	0	0
	Human Resources									
82	Internal Employee/Management Meetings	0	0	0	0	0	28,000	0	0	0
83	All - Staff Meetings	0	0	0	0	0	40,000	0	0	0
84	Training & Tuition Reimbursement- Staff	0	0	0	0	0	110,000	0	0	0
85	Employee Engagement and Recognition	0	0	0	0	0	35,000	0	0	0
86	Recruitment	0	0	0	0	0	45,000	0	0	0
	Sub-Total Human Resources	0	0	0	0	0	258,000	0	0	0
	Total Program Expenses	1,352,800	794,499	385,000	2,480,000	1,950,994	258,000	1,800,000	0	0
		1,191,773								

MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026  
OPERATING BUDGET  
DETAIL PROGRAM BUDGET BY LINE ITEM

LN REF	FIELD & ORGANIZING	TRAINING AND PROFESSIONAL LEARNING	LEGISLATION, POLICY AND POLITICAL ACTION	COMM. DIVISION	LEGAL SERVICES	GOVERNANCE & ADMIN	HUMAN RESOURCES	FINANCE & ACCOUNTING	ITS	PRINTING & MAILING
	ADMINISTRATIVE EXPENSES									
87	Office Supplies / Small Equip	0	1,000	0	0	0	0	50,000	0	50,000
88	Equipment Maintenance/Leasing	84,000	9,800	0	0	0	0	0	178,000	49,000
89	Computer Leasing	0	0	0	0	0	0	0	40,000	0
90	Internet Connectivity	0	0	0	0	0	0	0	33,600	0
91	Equipment Repairs - Printing and Mailing	0	0	0	0	0	0	0	0	4,500
92	Software Packages	14,000	0	9,000	0	22,000	0	40,000	270,000	0
93	Insurance - APL Policy	0	0	0	18,000	0	0	0	0	0
94	Offsite Storage	0	0	0	0	0	0	0	0	0
95	Bank Service Fees	0	0	0	0	0	0	18,000	0	11,500
96	MTAB- Hanover & Liberty Mutual Property Casualty Advertising	0	0	0	0	0	0	20,000	0	0
97	Corporate Insurance	0	0	0	0	0	0	145,000	0	0
98	Postage and Delivery	8,000	0	0	0	0	0	0	0	66,000
99	Paper	0	1,000	0	0	0	0	0	0	67,000
100	Dues	500	2,000	1,500	8,000	55,500	1,000	500	0	0
101	Subscriptions	0	5,000	7,000	86,000	600	1,500	0	0	65,000
102	Records Retention	0	0	0	0	0	0	0	0	0
	Total Administrative Expenses	147,250	18,800	17,500	112,000	78,100	2,500	273,500	521,600	313,000
	TOTAL EXPENSES BEFORE CONTINGENCY	25,358,379	4,694,097	2,774,855	7,344,390	5,228,970	1,305,639	5,345,157	1,237,553	890,860
103	Depreciation	0	0	0	0	0	0	400,000	0	0
104	Contingency	0	0	0	0	265,992	0	0	0	0
105	Reserve Strengthening Fund	0	0	0	0	0	0	0	0	0
106	Unrelated Business Income Tax	0	0	0	0	0	0	90,000	0	0
107	Increased Campaign Capacity	0	0	0	0	0	0	0	0	0
	TOTAL EXPENSES	25,358,379	4,694,097	2,774,855	7,344,390	5,494,962	1,305,639	5,635,157	1,237,553	890,860
	NET INCOME/(LOSS)	0	0	0	0	0	0	0	0	0



# SECTION 6





# REVENUE

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
2 - NEA UniServ Funding - Full Time	2,614,508	2,730,634	2,923,220	3,433,793	510,573
F&O	2,552,367	2,730,634	2,923,220	3,433,793	510,573
LPPA	41,141	0	0		
Training	21,000	0	0		
TOTAL	2,614,508	2,730,634	2,923,220	3,433,793	510,573

**SOURCE OF REVENUE:** NEA provides state affiliates with a grant for each full-time “UniServ” staff (field and other related staff) employed by the affiliate. The total amount of NEA funds available for grants to NEA affiliates is determined by the number of NEA members. That total fund is divided by the number of grants applied for by each state affiliate. For the current budget year (2024-2025), the amount was \$41,371 per full-time employee. The proposed 2025-2026 budget uses the same per FTE amount and includes the total amount in the NEA UniServ actual grant for the current fiscal year, plus one additional new TPL employee. The NEA has not yet published a new rate for the 2025-2026 budget year.

**Reasons for Revenue Increase/Decrease:** Increased because of added staff positions which are eligible for reimbursement.

**Related Expense Line Item:** Line #1 Salaries

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
3 - NEA UniServ Funding – Part Time	222,296	284,691	312,855	235,815	(77,040)
F&O	127,674	166,980	312,855	235,815	(77,040)
LPPA	94,622	117,711	0		
TOTAL	222,296	284,691	312,855	235,815	(77,040)

**SOURCE OF REVENUE:** The NEA grant program also provides grants for part-time UniServ positions. MTA part-time positions eligible for this grant include Regional Representatives (part-time, intermittent field rep-organizers) and Senate District Coordinators.

**Reasons for Revenue Increase/Decrease:** Decreased rate is due to the decrease in part-time positions because of increase in full-time positions.

**Related Expense Line Item:** Line #3 Part-time Staff

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
4 - NEA Funds – Project / Grant Revenue	75,000	456,444	225,000	225,000	0

**SOURCE OF REVENUE:** NEA provides state affiliates a grant for reimbursement of costs associated with signing up potential members.

**Reasons for Revenue Increase/Decrease:** In addition to a grant for the summer member organizer program, NEA has grants for additional membership sign-up campaigns, and grants for continued advocacy around ensuring accountability regarding funding from Fair Share.

**Related Expense Line Item:** Line #2 Wages (Summer Member Organizers)

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
5 - NEA Legal Reimbursement	1,600,000	1,327,697	1,600,000	1,600,000	0

**SOURCE OF REVENUE:** This revenue is from the NEA Unified Legal Services Program (ULSP), which reimburses a portion of the legal costs of NEA state affiliates. Under the program, NEA reimburses a portion of attorneys' time and auxiliary costs for qualifying cases. Many of the legal cases handled by MTA attorneys (inside and outside) are eligible for NEA reimbursement, but a significant amount of legal work does *not* qualify for reimbursement. Non-reimbursable legal work is performed primarily by the in-house staff attorneys, such as written legal opinions requested by locals, local affiliate workshops, support for MTA committees, Field and Organizing staff training, attendance at Field and Organizing staff meetings, assistance to the Government Relations staff in drafting and reviewing pending legislation, campaign finance, advice to CEPP, and participation in MTA work groups.

**Reasons for Revenue Increase/Decrease:** Level funded.

**Related Expense Line Item:** Line #61 Auxiliary Support / Line # 63 Outside Attorney Fees – Legal

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
6 - Insurance & Court Reimb of Attorney's Fees	20,000	6,688	20,000	10,000	(10,000)

**SOURCE OF REVENUE:** This revenue is mainly from an NEA policy covering members' legal fees in defending employment-related criminal charges. Fees are reimbursed only if the member is acquitted of the charges. To assist members at the outset, MTA's Legal Services Policy covers \$5,000 of attorneys' fees in criminal cases and NEA reimburses MTA 50% of that amount. If the legal costs exceed \$5,000, the member is personally responsible for the balance. Upon acquittal, the insurance company reimburses the member for attorney fees up to \$35,000 and MTA recoups its share; the maximum reimbursement per case MTA receives is \$2,500 (50% of \$5,000). (Any award of attorney fees in a civil case, which is very rare, would also be included here).

**Reasons for Revenue Increase/Decrease:** Decrease \$10,000

This depends largely on how many cases are filed and completed under EEL insurance and if they are acquitted. This could vary but as of now we look to take in about the same.

**Related Expense Line Item:** Line #61 Auxiliary Support / Line # 63 Outside Attorney Fees – Legal

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
7 - Conference/Workshop Revenue	21,000	6,439	21,000	5,000	(16,000)

**SOURCE OF REVENUE:** Fees paid by attendees for some MTA-sponsored conferences and workshops. This line does not include the annual Summer Conference fees, which are accounted for in a separate line.

**Reasons for Revenue Increase/Decrease:** Decrease as we have moved away from charging members conference registration fees.

**Related Expense Line Item:** Lines #38 to 47 TPL – Conferences and Workshops

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
8 - Summer Conference Revenue	24,150	37,644	24,150	15,000	(9,150)

**SOURCE OF REVENUE:** Summer Conference revenue is from participants' payments for housing and meals from one to four nights, registrant late fees, conference/commuter fees, vendors/candidates and reimbursements from FSO for the cost of its FSO Lawn Party.

**Reasons for Revenue Increase/Decrease:** We have moved away from charging members for conference registration fees.

**Related Expense Line Item:** Line #40 Summer Conference Expense

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
9 - Workers Comp Reimbursement	60,000	60,131	60,000	60,000	0

**SOURCE OF REVENUE:** This line accounts for revenue MTA receives from workers' compensation cases that result in an award of attorney fees under the workers' compensation law.

**Reasons for Revenue Increase/Decrease:** Level funded.

**Related Expense Line Item:** Line #63 Outside Attorney Fees – Workers Comp

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
10 - Annual Meeting Revenue	20,000	20,481	20,000	21,000	1,000

**SOURCE OF REVENUE:** Annual Meeting revenue consists of the fee MTAB pays for exhibitor booths, as well as occasional fees from MTA candidates running for elected positions, MTA committees and campaigns, and/or external partners.

**Reasons for Revenue Increase/Decrease:** There is increasing interest in exhibiting at Annual Meeting.

**Related Expense Line Item:** Line #64 Annual Meeting Expenses

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
11 - Newspaper Advertising	40,000	42,250	40,000	40,000	0

**SOURCE OF REVENUE:** Income from advertising in MTA Today. All ad space is sold to MTA Benefits.

**Reasons for Revenue Increase/Decrease:** Level fund.

**Related Expense Line Item:** Line #59 MTA TODAY

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
12 - Printing Income	50,000	93,550	50,000	94,000	44,000

**SOURCE OF REVENUE:** Represents income from printing jobs paid for by locals and other allied groups.

**Reasons for Revenue Increase/Decrease:** Increased to reflect actual experience.

**Related Expense Line Item:** Line #99 Paper

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
13 - Human & Civil Rights Event Revenue	600	0	600	0	(600)

**SOURCE OF REVENUE:** Registration fees received for the annual MTA Human & Civil Rights Awards Banquet.

**Reasons for Revenue Increase/Decrease:** No revenue included because we are eliminating fees for this event.

**Related Expense Line Item:** Line #65 Human & Civil Rights Dinner and Awards

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
14 - Interest and Dividend Income	1,274,641	1,819,033	1,442,986	1,820,000	377,014

**SOURCE OF REVENUE:** Interest and dividends earned from MTA's cash and investment portfolio and bank interest.

**Reasons for Revenue Increase/Decrease:** Assuming MTA assets hold at current values and no withdrawals, the proposed estimate is reasonable, based on current year projections using current portfolio values.

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
15 - MTA Benefits/Misc. Income	171,000	144,906	163,000	158,800	(4,200)

**SOURCE OF REVENUE:** Fees received from MTA Benefits for MTA management and personnel services, as well as a royalty fee generated by MTAB programs. Estimates include Management fee - \$73,000, Royalty fee - \$55,800 and Personnel fee - \$30,000.

**Reasons for Revenue Increase/Decrease:** Decreased to reflect most current actual data. Bargaining year affects the personnel costs projected in 2026.

REVENUE Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
16 - Property and Casualty Endorsement and Royalty Income	200,000	244,740	200,000	240,000	40,000

**SOURCE OF REVENUE:** Endorsement and royalty income earned from Hanover Insurance and Liberty Mutual on their property/casualty book of MTA member business. Earnings are based on: (1) the level of business retention plus new business from Hanover and (2) Liberty Mutual's book of new business.

**Reasons for Revenue Increase/Decrease:** Increase expected based on FY 2024 actual experience.

**Related Expense Line Item:** Line #96 MTAB - Hanover and Liberty Mutual Property Casualty Advertising Fee.

# EXPENSES

SALARIES & FRINGE BENEFITS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
1 - Salaries	17,387,069	17,938,499	19,458,346	22,143,499	2,685,153

**EXPENSE COMPONENTS:** Salaries for non-unit, FSO and MATA units.

**Reasons for Expense Increase/Decrease:** The amount proposed for 2025-2026 includes added staff for increased campaign capacity (reflected in line 107 Contingency in last year's budget) and step increases required by MTA's contracts with FSO and MATA, and salary increases for the President and Vice President, as required under MTA policy. Also included are new staff in TPL, legal, communications, finance, administration, less a position in human resources.

**Justification for Continuation of Expenses:** Cost for staff.

**Related Revenue Line Item:** Line #2 NEA UniServ Funding - Full time

SALARIES & FRINGE BENEFITS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
2 - Wages	4,130,466	4,224,402	4,603,919	4,951,104	347,186

**EXPENSE COMPONENTS:** Wages for staff in MTASO unit and Summer Member Organizers.

**Reasons for Expense Increase/Decrease:** The amount proposed for 2025-2026 includes step increases required by MTA's contract with MTASO and the wage estimate for the Summer Member Organizer program. Also included is the addition of a legal coordinator.

**Justification for Continuation of Expense:** Cost for staff and summer organizing efforts.

**Related Revenue Line Item:** Line #4 NEA Funds - Project/Grant Revenue

SALARIES & FRINGE BENEFITS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
3 - Part-Time Staff	627,500	579,268	740,000	740,000	0
Field and Organizing	115,000	59,308	115,000	115,000	0
LPPA	337,500	313,400	450,000	450,000	0
Legal Services (Retirement Consultants)	175,000	208,561	175,000	175,000	0
TOTAL	627,500	579,268	740,000	740,000	0

**EXPENSE COMPONENTS:** Field and Organizing part-time staff are the Regional Reps, assigned on an as-needed basis to MTA locals. Grassroots part-time expenses for 2024-25 are for 50 Senate District Coordinators (SDCs) at \$9,000 each annually. The Legal Division's part-time employees are the 13 Retirement Consultants.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation of Expense:** These part-time employees provide essential and valued services to members. MTA receives NEA reimbursement for seven of the Field and Organizing and Grassroots positions.

**Related Revenue Line Item:** Line #3 NEA UniServ Funding - Part time

SALARIES & FRINGE BENEFITS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
4 - Overtime	173,000	339,708	173,000	265,500	92,500

**EXPENSE COMPONENTS:** Overtime paid to MTASO bargaining unit employees.

**Reasons for Expense Increase/Decrease:** Increased to reflect actual activity.

**Justification for Continuation of Expense:** Needed to accommodate work fluctuation. Overtime is needed for processing membership in the fall, as well as for staffing governance meetings, summer conference and annual meeting.

SALARIES & FRINGE BENEFITS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
5 - FICA	1,654,725	1,736,882	1,925,964	2,088,908	162,944

**EXPENSE COMPONENTS:** Employer FICA and Medicare tax expense for the fiscal year.

**Reasons for Expense Increase/Decrease:** The budget increase is in line with contractual salary and wage increases. FICA is estimated using actual published rates.

**Justification for Continuation of Expense:** Legal obligation.

SALARIES & FRINGE BENEFITS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
6 - Pension	6,390,127	1,264,486	6,287,091	6,018,621	(268,470)

**EXPENSE COMPONENTS:** The MTA retirement plan year runs from July 1 through June 30. MTA's contribution to the plan for each plan year is due in March following the close of the plan year, so the contribution we are budgeting for will be paid in March 2026, for the plan year ended June 30, 2025. MTA's contribution in this budget covers MTA employees; MTAB budgets a separate annual contribution covering MTAB employees. This line item also includes a small amount (approximately \$20,000) to reimburse the president and vice president for retirement payments deducted from their paychecks while on a leave of absence from their public employment, in accordance with MTA policy.

**Reasons for Expense Increase/Decrease:** Slight decrease based on funded status. The MTA budget for staff pensions is based upon an actuarial study conducted in 2015 by Mercer, our employee pension consultant. Annually, we revisit the results of this study with Mercer and follow its guidance on contributions that retain a strong-funded status in the Pension Plan. In 2018, Mercer conducted a further study and advised us in March 2018 that the study's conclusions continued to be valid, and a contribution reduction would be possible, if needed. Mercer updated the funding study in November 2022, showing some erosion of our funded status due to the reduction in funding and asset values. However, the plan remains extremely well-funded and this year's budget is again based on consultation with Mercer. MTA's budgeting approach aims to avoid large fluctuations from year to year, thus maintaining a well-funded pension without an unanticipated impact on member dues in any given year.

**Justification for Continuation of Expense:** Contractual and policy obligations to MTA employees and legal requirements governing pension contributions.

SALARIES & FRINGE BENEFITS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
7 - Health & Dental Insurance	4,053,776	4,060,170	5,135,342	5,402,969	267,627

**EXPENSE COMPONENTS:** Health and dental premiums, net of employee contributions.

**Reasons for Expense Increase/Decrease:** Assumes a projected increase in health care premiums of 10%, and no change in dental premiums for 2025-2026, based on anticipated increases in health care costs.

Justification for Continuation of Expense: Contractual and policy obligations to MTA employees.

SALARIES & FRINGE BENEFITS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
8 - Post-Retirement Health Insurance	400,000	815,313	422,793	422,797	4

**EXPENSE COMPONENTS:** There are three numbers relevant to MTA's post-retirement health insurance obligations to MTA employees under the MTA's three staff union contracts and MTA policies that cover non-unit employees:

- (1) The amount proposed in the budget for each budget year. We budget for the cash MTA will pay out in the budget year on behalf of MTA retirees to meet our obligations under employee contracts and policies.
- (2) The annual expense according to GAAP accounting standards that must be recorded in the statement of operations. This amount is provided by MTA's actuaries.
- (3) MTA's total post-retirement liability. This is MTA's total actuarial liability for post-retirement health benefits (excludes MTAB). This is not considered in MTA's annual budget but is carried as a liability on MTA's balance sheet and affects our organization's overall financial position.

**Reasons for Expense Increase/Decrease:** Estimated future benefit payments.

**Justification for Continuation of Expense:** Contractual and policy obligations to MTA employees.

SALARIES & FRINGE BENEFITS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
9 - Life Insurance	119,090	108,979	133,402	117,475	(15,927)

**EXPENSE COMPONENTS:** Life insurance and AD&D premiums, net of employee contributions.

**Reasons for Expense Increase/Decrease:** Decrease. This line increases when the salary and wages lines increase, however, current rates have resulted in a premium closer to actual experience than in the past.

**Justification for Continuation of Expense:** Contractual and policy obligations to MTA employees.

SALARIES & FRINGE BENEFITS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
10 - Short-, Long-Term Disability & PFMLA	181,864	262,270	240,145	225,925	(14,220)

**EXPENSE COMPONENTS:** Short- and long-term disability premiums and Massachusetts Paid Family Medical Leave Act premiums.

**Reasons for Expense Increase/Decrease:** Increase is due to increased utilization and overall increase in benefit-eligible compensation. Used most current rates being charged by our carriers.

**Justification for Continuation of Expense:** Contractual and policy obligations to MTA employees.

SALARIES & FRINGE BENEFITS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
11 - State/Federal Unemployment Tax / Universal Health	90,332	102,064	92,564	81,059	(11,505)

**EXPENSE COMPONENTS:** State/Federal unemployment taxes.

**Reasons for Expense Increase/Decrease:** Includes full complement of staff, all subject to unemployment taxes. The rates for FUTA and SUTA are established annually as a percentage of payroll costs.

**Justification for Continuation of Expense:** Legal requirement.

SALARIES & FRINGE BENEFITS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
12 – Workers' Compensation	25,001	36,319	29,315	28,007	(1,308)

**EXPENSE COMPONENTS:** Workers' compensation coverage for employees.

**Reasons for Expense Increase/Decrease within Program Accounts:** Workers' compensation premiums are based on total organizational compensation for all employees. An audit of headcount and organizational role is conducted annually to adjust the premium charged. This item was decreased to more accurately reflect recent costs.

**Justification for Continuation of Program:** Legal requirement.

CONTRACTED SVCS & PROF FEES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
13 - Consultants	200,000	542,369	200,000	282,000	82,000

**EXPENSE COMPONENTS:** Consulting services, including pension actuary, IT expertise, and financial system expertise, as well as some interim management positions.

**Reasons for Expense Increase/Decrease:** Expense line item includes Consulting, TPA and Professional Services.

**Justification for Continuation of Expense:** Expertise required in specialty areas such as pension, employee survey, management development, IT services and financial systems troubleshooting and maintenance.

CONTRACTED SVCS & PROF FEES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
14 - Audit Fees	60,000	91,300	90,000	90,000	0

**EXPENSE COMPONENTS :** MTA's annual audit and tax work - \$70,000 and 401k audit work - \$20,000.

**Reasons for Expense Increase/Decrease:** Increased from 23-24 due to additional tax and audit support needed related to new accounting rules.

**Justification for Continuation:** Necessary business expense.

CONTRACTED SVCS & PROF FEES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
15 - Investment Consulting Fees	204,664	223,753	230,000	209,208	(20,792)

**EXPENSE COMPONENTS:** Investment fees are charged for handling our investment accounts.

**Reasons for Expense Increase/Decrease:** Reduced amount of investments under management due to reserve spending for MTA initiatives.

**Justification for Continuation:** Expert advice is necessary to implement MTA's current investment policy.

CONTRACTED SVCS & PROF FEES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
16 - Payroll & HR Service Fees	70,000	75,447	120,000	120,000	0

**EXPENSE COMPONENTS:** Payroll and human resource information system processing charges with ADP.

**Reasons for Expense Increase/Decrease:** Level funded, reflecting a Human Resource Information System project in Human Resources in 2024-2025.

**Justification for Continuation of Expense:** Increased efficiency in payroll processing.

CONTRACTED SVCS & PROF FEES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
17 - Corporate Counsel	125,000	59,915	100,000	100,000	0

**EXPENSE COMPONENTS:** This line provides funds for legal services related to labor relations matters, benefits counsel, MTA office leases, and other business-related legal advice. Our spending fluctuates from year to year depending on the issues that arise.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation of Expense:** Necessary business expense.

FACILITIES & TELEPHONE Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
18 - Telephone	200,000	223,518	150,000	150,000	0

**EXPENSE COMPONENTS:** Telephone expenses for all offices and employees. Also includes interoffice connectivity.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation of Expense:** Necessary business expense.

FACILITIES & TELEPHONE Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
19 - Rent	1,788,646	1,743,092	1,831,689	1,678,138	(153,551)

**EXPENSE COMPONENTS:** Rent for MTA offices: Quincy, Boston, Raynham, Middleton, Auburn, Holyoke and Pittsfield.

**Reasons for Expense Increase/Decrease:** Overall decrease. Regional offices are incurring escalating lease costs and Quincy lease increases for the first half of FY26, but then lease expires and will be renegotiated based on less square footage and reduced rate.

**Justification for Continuation of Expense:** Space needed for staff offices, member training, and meetings of MTA Board, Executive Committee, MTA committees, MTA locals, coalition partners and groups allied with MTA.

FACILITIES & TELEPHONE Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
20 - Janitorial Supplies/Services	44,128	36,555	53,635	36,555	(17,080)

**EXPENSE COMPONENTS:** Cleaning and supplies for each office.

**Reasons for Expense Increase/Decrease:** Amount established based on FY24 actual expense.

**Justification for Continuation of Expense:** Required for maintenance of MTA offices.

FACILITIES & TELEPHONE Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
21 - Utilities & Operating Exp.–Leaseholds	264,945	339,433	429,850	311,228	(118,622)

**EXPENSE COMPONENTS:** Utilities and operating expenses for all MTA offices. Operating expenses include our tenant portion of real estate taxes (in excess of base costs included in monthly lease payments), common area maintenance and utility costs, and personal property taxes on furniture and fixtures.

**Reasons for Expense Increase/Decrease:** Amount established based on FY24 actual expense. Reductions in Quincy, Boston and Holyoke offices.

**Justification for Continuation of Expense:** Required under terms of current leases.

BUSINESS EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
22 - Travel-Mileage	234,996	255,827	234,996	257,343	22,347

**EXPENSE COMPONENTS:** Reimbursement to staff for the cost of mileage when meeting with MTA members and locals.

**Reasons for Expense Increase/Decrease:** Increase due to increase in field and organizing personnel.

**Justification for Continuation of Expense:** Reimbursement for necessary business expenses is required under staff contracts and MTA policies.

BUSINESS EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
23 - Travel-Other	215,012	441,488	215,012	396,914	181,902

**EXPENSE COMPONENTS:** Staff parking and other approved business expenses (meals, tolls, parking and out-of-town travel).

**Reasons for Expense Increase/Decrease:** Increase due to more traveling staff and out-of-town travel in divisions.

**Justification for Continuation of Expense:** Reimbursement for necessary business expenses is required under staff contracts and MTA policies.

BUSINESS EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
24 - Travel and Residence – President's Expenses	52,000	42,184	0	45,000	45,000

**EXPENSE COMPONENTS:** MTA policy provides housing for a President and/or Vice President who reside more than 50 miles from headquarters and reimbursement for reasonable business expenses. Housing has been provided for the current president in accordance with MTA policy.

**Reasons for Expense Increase/Decrease:** Increase from last year is because this item was budgeted in contingency, pending the outcome of the MTA election in 2024. Amount above includes approximately \$27,000 for rent of a Boston location.

**Justification for Continuation of Expense:** Necessary to support president's activities with members and in representing MTA with external entities and leaders.

BUSINESS EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
25 - Travel and Residence – Vice President's Expenses	22,000	15,540	0	20,000	20,000

**EXPENSE COMPONENTS:** MTA policy provides housing for a President and/or Vice President who reside more than 50 miles from headquarters and reimbursement for reasonable business expenses.

**Reasons for Expense Increase/Decrease:** Increase from last year is because this item was budgeted in contingency, pending the outcome of the MTA election in 2024. No housing amount included in this budget.

**Justification for Continuation of Expense:** Necessary to support vice president's activities with members and in representing MTA with external entities and leaders.

FIELD & ORGANIZING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
26 - State and Local Organizing	425,000	554,917	425,000	750,000	325,000

**EXPENSE COMPONENTS:** This account supports a wide variety of organizing activities at the local, regional and state levels. Activities include member meetings held throughout the state, regional leadership meetings, and projects associated with statewide/regional/local campaigns. It also covers expenses (not including wages) for the Summer Member Organizer program. This line item also supports All In organizing campaigns and other special organizing projects such as ALANA initiatives and the ESP Bill of Rights and Living Wage campaign. Additionally, this account supports expenditures for regional bargaining councils, regional action networks, and projects that advance their coordination and campaigns. As we increase the number of locals participating in open bargaining and bargaining for the common good, this organizing line will support the increasingly robust contract campaigns which involve our members as well as the community.

There are a number of grant programs available to locals included in this line item as well:

- All In Grants support local organizing and member engagement plans as determined by each participating local.
- New Member Welcome Grants support local activities and gatherings associated with new member orientations.
- Bargaining Crisis Grants and Higher Ed Negotiations Support Grants support locals when they have reached an impasse or similar crisis in negotiations.

**Reasons for Expense Increase/Decrease within Program Account:** Actual spending exceeded budgeted amount because more locals than ever took advantage of the All In Grant. In addition, this line item funds all actions and events that take place on a regional basis including but not limited to regional contract campaign events and Safe Schools organizing events.

**Justification for Continuation of the Program:** All of our Field and Organizing work helps to build the collective power at the local, regional and statewide level that is essential to advancing all five of the Blueprint priorities. F&O's many varied organizing campaigns and projects are aimed at connecting members to the life of the union, cultivating leadership at all levels of the union, and engaging educators of color in the union and creating paths to leadership – all of which is the foundation of maximizing a local's bargaining power, as well as winning groundbreaking statewide legislative and policy campaigns.

FIELD & ORGANIZING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
27 - Higher Ed Membership Data Reimbursement	35,000	14,678	35,000	35,000	0

**EXPENSE COMPONENTS:** Money given to three higher education locals to assist with the costs of tracking and processing the membership information.

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded.

**Justification for Continuation of Program:** Support for higher ed locals.

FIELD & ORGANIZING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
28 - Large Locals	14,773	12,948	14,773	24,773	10,000

**EXPENSE COMPONENTS:** Cost for food and materials for eight monthly meetings and the hotel charges for a two-day meeting twice a year for the presidents of large locals.

**Reasons for Expense Increase/Decrease within Program Accounts:** Increased to add funds to allow local presidents funding to attend MTA meetings, when needed.

**Justification for Continuation of Program:** Large locals represent a significant portion of the total MTA membership. Large locals encounter a constant flow of critical issues that makes this forum for sharing, analyzing problems, and developing potential solutions for local issues ever more important. These meetings also provide an opportunity for MTA leaders and staff to meet regularly with large local leaders to discuss important local and statewide topics.

FIELD & ORGANIZING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
29 - Health and Welfare Initiatives Consultant	40,000	2,600	10,000	5,000	(5,000)

**EXPENSE COMPONENTS:** This is a local grant program in which MTA shares the cost that locals incur for the services of MTA's health insurance consultant, Boston Benefit Partners. Most of this consulting is now handled directly by MTA staff supported by the Bargaining Campaign Strategy team.

**Reasons for Expense Increase/Decrease:** This expertise has been gained in-house.

**Justification for Continuation of Program:** The program provides consulting services to help local associations analyze and solve important health care plan problems, a key issue for our members.

FIELD & ORGANIZING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
30 - Indoor Air Quality / Workplace Health and Safety Issues Consultant	90,000	73,344	90,000	75,000	(15,000)

**EXPENSE COMPONENTS:** This is a local grant program in which MTA shares the cost that locals incur for expert services on indoor air quality/workplace health and safety issues. To receive a grant, locals are required to have a health and safety committee, either existing or developed as part of the grant. Grants are based on preset funding; assistance above and beyond the base grant amount requires a dollar-for-dollar matching fund to a predetermined maximum.

**Reasons for Expense Increase/Decrease within Program:** The hiring of a H&S organizer has expanded our capacity to provide locals with consultation expertise including mold inspection and testing and general IAQ assessments. We also no longer have outside legal counsel triage intake requests and instead the H&S organizer assesses the needs and makes the assignment determination.

**Justification for Continuation of Program:** Workplace health and safety is a priority concern for our members and locals, often requiring a degree of technical expertise. At the same time, addressing health and safety issues provides important opportunities for organizing. With a focus on assisting locals to form health and safety committees, this grant program builds long-term capacity.

FIELD & ORGANIZING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
31 - Local Office Support	1,850,000	1,636,154	1,800,000	1,800,000	0

**EXPENSE COMPONENTS:** This is money that is returned to locals under the local office support program. See MTA Policy 140.50 for details. In effect, members in locals who receive this support are getting a rebate for their locals on their MTA dues. The local office support formula caps the reimbursement to locals at a dollar value per FTE member.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation of Program:** This program provides financial help to locals.

FIELD & ORGANIZING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
32 - Membership Materials / ID Cards	100,000	117,868	100,000	100,000	0

**EXPENSE COMPONENTS:** Design, printing, assembly and mailing of membership materials and retiree calendars. The handbooks for local presidents and building reps are being revised and redesigned this year.

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded.

**Justification for Continuation of Program:** Membership recruitment and retention are essential to the vitality and collective power of our union. Membership cards and other materials inform new and continuing members what membership in their local, MTA and NEA means and provides.

FIELD & ORGANIZING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
33 - Staff Meetings/Training (F&O)	50,000	110,653	50,000	125,000	75,000

**EXPENSE COMPONENTS:** Conference room rental, meals and materials for four, in-person field staff meetings plus the annual two-day off-site planning meeting attended by all Field and Organizing staff.

**Reasons for Expense Increase/Decrease within Program Accounts:** Actual expenses for four, in-person staff meetings, one staff retreat, in-person staff trainings and regional staff trainings justify the increased request.

**Justification for Continuation of Program:** Staff meetings and the staff retreat are essential to provide a statewide forum for staff to assess and plan the work and provide a regular opportunity for staff training. The meetings also provide a forum for MTA leaders to engage in constructive conversations with the preK-12 and Higher Ed field staff. Renting meeting space is necessary because the number of staff is too big for any MTA office conference room.

FIELD & ORGANIZING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
34 - Higher Ed Leadership Meetings	5,000	0	0	5,000	5,000

**EXPENSE COMPONENTS:** Meals, facilities (when needed), mileage and materials for meetings of the Higher Education Leadership Council (HELIC), which brings together the leaders of various higher education locals for monthly meetings.

**Reasons for Expense Increase/Decrease within Program Accounts:** HELIC meetings remain mostly virtual, however, HELC leaders intend to schedule an in-person meeting at the Worcester office at least once during the budget year.

**Justification for Continuation of Program:** HELC provides higher ed locals the opportunity to meet on a regular basis to share information and ideas, and to increase the efficiency and effectiveness of the work of higher ed leaders on behalf of their members. These meetings continue, albeit on a virtual basis.

FIELD & ORGANIZING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
35 - MTA Reporter (Retired)	25,000	42,023	25,000	25,000	0

**EXPENSE COMPONENTS:** Pays for production and mailing of four issues of MTA Reporter.

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded.

**Justification for Continuation of Program:** The Reporter is one component of MTA's retired member program. It plays an important role in the Blueprint priority of connecting all members, in this case retirees, to the life of the union.

FIELD & ORGANIZING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
36 - Membership Recruitment	10,000	13,830	10,000	15,000	5,000

**EXPENSE COMPONENTS:** This line item covers a cost-sharing grant which provides funds to locals for activities designed to recruit and retain members and covers our share of the costs NEA incurs for printing membership forms.

**Reasons for Expense Increase/Decrease:** Additional funds needed to retain and recruit members.

**Justification for Continuation of Program:** MTA's support for member recruitment and retention activities in locals goes far beyond this grant. The grant is one way to support member recruitment and retention in locals which need financial assistance for these efforts.

FIELD & ORGANIZING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
37 - Contract Data Research System	21,600	21,000	32,000	32,000	0

**EXPENSE COMPONENTS:** Costs for annual upkeep of the contract database for researching provisions in local collective bargaining agreements.

**Reasons for Expense Increase/Decrease:** Additional database and tools used by the campaign research team. Level funded.

**Justification for Continuation of Program:** Four new databases have been developed and added to the contract database platform: an arbitration database; a school budget/finances database; a contract settlement report database, and a salary comparison database. A higher ed budget/finance database is in development and when completed will also be accessible on this platform. This new data is essential for all contracts, including ESP living wage campaign, to demonstrate the employer's capacity to lift wages. Contract information is important to collect and make available for use by local bargaining teams as part of furthering the Blueprint priority of maximizing bargaining power. Being able to share information is critical to support the growing interest in coordinated bargaining among our locals. It is also essential for research and responses on legislative matters.

TRAINING & PROF. LEARNING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
38 - Leadership & Organizational Development	98,000	99,103	175,000	350,000	175,000

**EXPENSE COMPONENTS:** This line item funds the non-staff costs to develop and implement training and professional learning programs for and with members (not including annual conferences), emphasizing learning opportunities related to organizing; member and community engagement; economic, social, gender, dis/ability and racial justice; leadership development at all levels of the union; and union administration. Included in this line item are anticipated program initiatives developed by the new Anti-Oppression Educator and Strategist, support for the ESP Bill of Rights and living wage campaign, the Next Generation Leadership Series, Book Circles (including the digital library), the MTA's annual Juneteenth event, the MTA's education policy and practice journal (a joint project with the CEPP) and ad hoc regional educational offerings, including those centered on bargaining.

**Reasons for Expense Increase/Decrease:** This line item was increased in the 2025-26 projections due to several unanticipated programmatic and project requests in the current fiscal year. The increase also reflects new initiatives related to the advancing of a community schools strategy. This includes professional learning about full-service community schools, community envisioning sessions, book clubs on community schools and building a Community School movement in Massachusetts broadly; MTA Forums; a "train-the-trainer" program centered on economic, social, gender, dis/ability and racial justice; and projects seeking to engage Black, Indigenous, and other people of color (BIPOC) members within the first five years of their career, retired members, adjunct faculty, higher education professional staff, Education Support Professionals (ESPs), and student members. This line item allows the division to accommodate diverse programmatic requests from locals, including the support of such programs as the Men of Education Gathering that seeks to support male educators of color and increase diversity in the field. This line item also allows the division to continue developing and implementing the MTA's open access policy and practice journal; a new youth activist conference; an annual labor conference on pensions; as well as respond to timely topics and issues such as ongoing questions and concerns over artificial intelligence in education and its impact on labor. This line item also allows for addressing increased attacks on curricula that center racial, economic and gender justice; addressing the crisis of student mental health and behavior issues; building a broad-based political education effort, including the history of labor and our own union, and addressing the growing threats to academic freedom, labor rights and, more broadly, defending democracy.

**Justification for Continuation of Program:** Robust member training and leadership development offerings are critical for supporting MTA locals and building our internal capacity. Every Blueprint priority is advanced through the wide range of member training and leadership programs that TPL offers. Other Executive Committee proposed budget priorities advanced through TPL programming include promoting the full-service community school model, bargaining for the common good, and ensuring that the MTA is a leading voice for public education.

TRAINING & PROF. LEARNING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
39 - Union Skills Conferences	78,000	109,091	85,800	150,000	64,200

**EXPENSE COMPONENTS:** This line item covers expenses associated with two statewide conferences: the Bargaining Summit and Winter Union Skills.

**Reasons for Increase/Decrease:** The increase reflects higher hotel expenses as the travel industry rebounds after the pandemic, tighter supplies given fewer hotel rooms under construction due to suspensions in the supply chain, rising interest rates and high inflation. Conference attendance continues to rise. The Bargaining Summit is projected to be moved from the winter to the fall, which will invariably mean increased hotel-related expenses.

**Justification for Continuation of Program:** The Bargaining Summit is critical in assisting locals in negotiations to win strong contracts and expand democratized bargaining. Winter Union Skills, one of MTA's most well-attended conferences, focuses on a wide range of skills for union leaders, from bargaining contracts to rank-and-file activism to union local administration. The Winter Union Skills/Bargaining Summit is the only space designed to address union skills comprehensively.

TRAINING & PROF. LEARNING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
40 - Summer Conference	360,000	283,802	300,000	330,000	30,000

**EXPENSE COMPONENTS:** The MTA Summer Conference will reflect on-site requirements and enhanced virtual supplements. The Summer Conference costs include rooms, meals and housekeeping services for participants. Additional expenses include presenter fees, special events, opening sessions (keynote, forum, AV) and conference publications. In addition, participation is sometimes entirely or partially funded for conference multi-session programs.

**Reasons for Increase/Decrease:** The increase in this line item reflects actuals over the past two years, offset by anticipated increases in: university rental rates, services attached to the venue, administrative costs, higher hotel expenses, and general conference-related expenses. One of the planning goals for 2025 and beyond is to increase conference attendance.

**Justification for Continuation of Program:** The Summer Conference is MTA's major training event, offering various leadership training and professional development workshops. Also, it provides the opportunity to launch organizational initiatives and reflect on the organization's focus and future direction. Participants enjoy opportunities to meet and network at planned and informal social and recreational activities. The previous two years confirm that virtual offerings will attract hard-to-reach members, and the TPL division also will continue developing a digital footprint.

**Related Revenue Line Item:** Line #8 Summer Conference Revenue.

TRAINING & PROF. LEARNING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
41 - Professional Development Workshops	141,000	79,125	141,000	100,000	(41,000)

**EXPENSE COMPONENTS:** This line item supports one- and two-day in-person, online and hybrid professional development workshops and programs for teachers, ESPs, administrators, and school/district teams in a wide variety of subject areas, including emergent bilingual (“ELL”) and special education offerings. Expenditures cover facilitator/educator fees and expenses, promotional materials, instructional materials and supplies, venue costs, and meals and refreshments. The line item also incorporates the expansion of a sociocultural and political context of education professional development series, professional development for higher education members, and anticipates the possible incorporation of the TLI program.

**Reasons for Expense Increase/Decrease:** Reduced to approximate actual experience.

**Justification for Continuation of Program:** Our members depend on the professional development opportunities MTA makes available throughout the year and at our conferences. In particular, members are provided with Professional Development Points to meet licensure and/or license renewal requirements, and some workshops offer continuing higher education credits as well. Professional development programming not only provides an important service that educators rely on, but it can also be a way, per our Blueprint priorities, to begin connecting members to the life of the union. Our higher education members would benefit from professional development to strengthen pedagogy and to document improvements in teaching in yearly evaluations. Expanding our offerings in anti-oppression education, with a strong focus on racial, economic, gender and dis/ability justice, will play an important role in our ability to lead on these critical issues as outlined in the MTA Blueprint.

**Related Revenue Line Item:** Line #7 Conference/Workshop Revenue.

TRAINING & PROF. LEARNING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
42 - New Member Conferences	47,730	34,984	52,503	40,000	(12,503)

**EXPENSE COMPONENTS:** This line covers the costs for the facility, meals, materials and guest speakers for the annual Early Career Educators Conference (ECEC), developed in collaboration with the New Member Committee, and for vacation week and regional workshops for new members. It also covers costs for SEAM members, including free participation in the Early Career Educators Conference and professional development activities on their campuses.

**Reasons for Expense Increase/Decrease:** Reduced to approximate actuals.

**Justification for Continuation of Program:** Research consistently shows that new members and student association members are more likely to stay in the teaching profession and take on leadership roles when they are introduced early in their career to the supports a union can provide. Similarly, this conference plays an important role in the Blueprint priority of connecting members to the life of the union and cultivating leadership among our younger members.

**Related Revenue Line Item:** Line #7 Conference/Workshop Revenue.

TRAINING & PROF. LEARNING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
43 - Ethnically Marginalized Affairs Committee Conference	47,730	86,611	52,503	90,000	37,497

**EXPENSE COMPONENTS:** This line covers the costs for the facility, meals, materials and guest speakers for the EMAC conference, developed in collaboration with the Ethnically Marginalized Affairs Committee, which comprises two days of presentations and discussions. The line item may also cover other projects and events advancing the mission of EMAC.

**Reasons for Expense Increase/Decrease:** The increase reflects higher hotel expenses as the travel industry rebounds after the pandemic, tighter supplies given fewer hotel rooms under construction due to suspensions in the supply chain, rising interest rates and high inflation. Costs associated with speakers and performers continue to rise.

**Justification for Continuation of Program:** EMAC is central to advancing the Blueprint priority of racial, social, gender, dis/ability and economic justice, particularly in supporting and developing leaders of color. The conference is the centerpiece of EMAC's annual programming.

**Related Revenue Line Item:** Line #7 Conference/Workshop Revenue.

TRAINING & PROF. LEARNING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
44 - Higher Education Conference	22,000	10,993	24,200	15,000	(9,200)

**EXPENSE COMPONENTS:** This line covers the costs for facility, meals, materials and guest speakers for the biennial Higher Education conference. Half of the cost is budgeted each fiscal year.

**Reasons for Expense Increase/Decrease within Program Accounts:** Reduced to approximate actual experience.

**Justification for Continuation of Program:** By creating a space for higher education leaders, members and allies to meet and discuss critical issues specific to public higher education, this conference fulfills the Blueprint priorities, especially maximizing bargaining power for our higher ed locals and members.

**Related Revenue Line Item:** Line #7 Conference/Workshop Revenue.

TRAINING & PROF. LEARNING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
45 - ESP Leadership & Professional Development	67,000	47,004	73,700	55,000	(18,700)

**EXPENSE COMPONENTS:** Expenses are for facilities, meals, materials, hotel rooms and outside trainers for regional workshops to serve the leadership and professional development needs of ESPs. (Expenses related to the annual ESP Conference are covered in the ESP Conference line.)

**Reasons for Expense Increase/Decrease within Program Accounts:** Reduced to reflect actual experience.

**Justification for Continuation of Program:** ESP membership represents a significant segment of the total membership, with unique needs that call for development of a leadership cohort. All of our ESP programming, whether this professional development line item, the ESP conference, or the many workshops for ESPs at other MTA conferences, is an important part of the Blueprint – connecting members to the life of the union, cultivating leadership, and advancing the Blueprint priority of economic, social, gender, dis/ability and racial justice.

**Related Revenue Line Item:** Line #7 Conference/Workshop Revenue.

TRAINING & PROF. LEARNING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
46 - ESP Conference	115,100	117,242	126,610	139,300	12,690

**EXPENSE COMPONENTS:** This line item covers the expenses for facilities, meals, materials, speakers and trainers associated with the annual ESP conference, developed in collaboration with the ESP Committee.

**Reasons for Expense Increase/Decrease within Program Accounts:** The 10% increase reflects higher hotel expenses as the travel industry rebounds after the pandemic, tighter supplies given fewer hotel rooms under construction due to suspensions in the supply chain, rising interest rates and high inflation.

**Justification for Continuation of Program:** ESP membership represents a significant segment of the total membership, with unique needs that call for the development of a leadership cohort. All of our ESP programming is an important part of the Blueprint – connecting members to the life of the union, cultivating leadership and advancing the Blueprint priority of economic, social, gender, dis/ability and racial justice. The cost of this conference is higher than others because historically attendance is higher.

**Related Revenue Line Item:** Line #7 Conference/Workshop Revenue.

TRAINING & PROF. LEARNING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
47 - Retired Conference and Gatherings	73,000	8,935	80,300	40,000	(40,300)

**EXPENSE COMPONENTS:** This account funds the annual Retired Member Gathering conference, Annual Meeting breakfast, and spring retirement breakfasts/luncheons, developed in collaboration with the Retired Members Committee.

**Reasons for Expense Increase/Decrease within Program Accounts:** Reduced to reflect remote meetings and actual experience.

**Justification for Continuation of Program:** These programs support the continued and vital involvement of our retired members in the work of MTA and, per the Blueprint, are an important part of connecting retired members to the life of the union.

**Related Revenue Line Item:** Line #7 Conference/Workshop Revenue

TRAINING & PROF. LEARNING Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
48 - General Conference Supplies and Services	36,000	23,270	39,600	43,500	3,900

**EXPENSE COMPONENTS:** Equipment, supplies and services that support the general conference program or are used at multiple conferences, such as multimedia projectors, easels, flip charts, exhibition supplies, hospitality items, etc.

**Reasons for Expense Increase/Decrease within Program Accounts:** The 10% increase reflects higher general conference supplies and services costs.

**Justification for Continuation of Program:** Equipment and supplies support the general conference programs. \_

LPPA Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
49 - Local Grants – Political Action Leaders	77,978	12,600	35,000	35,000	0

**EXPENSE COMPONENTS:** Grants to local associations to cover costs of stipends for Political Action Leaders (PALs).

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded.

**Justification for Continuation of Program:** The program is a good one, but more emphasis is being placed on the SDC program.

LPPA Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
50 - Regional Team Organizing Expenses	0	129	15,000	10,000	(5,000)

**EXPENSE COMPONENTS:** Each Senate District Coordinator is responsible for organizing a Legislative and Political Action Team (LPAT) consisting of at least 25 educators and community members from a defined region. This team-building process incurs expenses such as printing, food, room rentals, organizing tools, etc.

**Reasons for Expense Increase/Decrease:** Reduced because we spent so little. But that was mostly because we used a campaign account. We are proposing \$10,000 in case there isn't another account to charge these expenses to.

**Justification for Continuation of Program:** The structures put in place through the LPAT program are crucial to the Blueprint priority of advancing policy solutions and campaigns.

LPPA Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
51 - State Convention	5,000	936	0	5,000	5,000

**Expense Components:** Funding for MTA presence at Democratic Convention.

**Reasons for Expense Increase/Decrease within Program Accounts:** This will be the year for platform, and we will want to be actively involved in shaping it.

**Justification for Continuation of Program:**

LPPA Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
52 – Local, State and Federal Elections and Issues	275,000	497,602	275,000	395,000	120,000

**EXPENSE COMPONENTS:** This line item covers campaign costs including the costs of design, production, and printing and mailing/digital distribution of materials to members, data updates to the VAN for use by activists and staff, the MTA Today election insert, and phoning in support of MTA-recommended state and municipal candidates and priority policy issues.

**Reasons for Expense Increase/Decrease within Program Accounts:** Federal elections merged into this account with its 2022-2023 funding level of \$120,000. This will support increased spending on local and state elections and reduce our reliance on reserves to fund these expenses.

**Justification for Continuation of Program:** This account helps support MTA’s involvement in elections for the state Legislature, governor and other statewide constitutional offices, as well as municipal offices, Proposition 2½ overrides, federal elections and issue campaigns. These elected officials make decisions that impact all educators including funding for preK-12 and higher education, COLA increases for higher education contracts, public employee benefits and education policy. MTA’s involvement in electoral races has lasting impact when our recommended candidates are then more likely to advocate for our goals. It is also an integral part of building member power.

LPPA Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
53 - VOTE – Political Contributions	14,999	10,150	14,999	14,999	0

**EXPENSE COMPONENTS:** The MTA’s permissible political contribution, pursuant to the Office of Campaign and Political Finance (OCPF) regulations (970 CMR 1.22), to its political action committee, Voice of Teachers for Education (VOTE).

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded.

**Justification for Continuation of Program:** Voice of Teachers for Education (VOTE) is MTA’s political action committee. Revised state campaign finance regulations permit MTA to contribute no more than \$15,000 in aggregate annually to the VOTE PAC and pro-education candidate committees.

LPPA Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
54 - Legislative Materials and Fees	25,000	13,655	25,000	25,000	0

**EXPENSE COMPONENTS:** Pays for lobbyist registration fees, research materials, subscriptions for magazines, newspapers; subscription to InstaTrac (online legislative tracking service providing status of bills, votes and summaries of legislation), subscription to the State House News Service and experts who testify at legislative hearings and provide research on pending legislative issues.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation of Program:** Necessary and integral part of our lobbying efforts. Lobbyist registration is required by law.

LPPA Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
55 - State Budget / Issues Activities / Polling	225,000	77,581	225,000	225,000	0

**EXPENSE COMPONENTS:** Expenses include alerting and informing members via direct mail, email, phoning, etc. about issues being considered by the Legislature that directly impact them and creating marketing communications materials that advance MTA's objectives with the general public and legislators. Includes expenses for a data management system. This line item also is utilized when needed for polling of both voters and our members around MTA's priority issues.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation of Program:** This program is key to keeping members informed and action-orientated around issues that are being decided by the Legislature and the governor. This includes issues that are MTA's major legislative priorities: building high-quality, debt-free public higher education, addressing the preK-12 fiscal crisis, protecting the Question 2 victory, and ensuring a dignified retirement.

LPPA Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
56 - Policy Development, Research and Monitoring	44,500	2,360	54,500	54,500	0

**EXPENSE COMPONENTS:** This line item is associated with the core work of CEPP: working with members, MTA staff, students and other community members and allies to support the policy goals of our members. Through quantitative and qualitative research on conditions in Massachusetts and best practices in other states, we build on the wisdom and insights of our members to identify and support policy initiatives that improve the learning conditions of students and the working conditions of educators. We focus particularly on the needs and aspirations of those students and educators who face the most significant challenges, including challenges rooted in systemic racism and other forms of oppression.

This line item also includes expenses related to advocacy with and the monitoring of the Board of Elementary and Secondary Education, the Board of Higher Education, the Board of Early Education and Care, Secretary of Education, the Legislature and related state and local agencies. Our proactive and reactive work addresses issues such as challenging the high-stakes MCAS regime, shaping educator licensure policies, advancing the ESP Bill of Rights, promoting community schools, monitoring educator evaluation, developing strategies to diversify the educator workforce, supporting culturally sustaining pedagogical practices, promoting equitable school finance, examining early college programs, halting charter schools and transforming school and district accountability. It also covers the launching and management of a peer-reviewed policy & practice journal. The primary goal of the journal is to rethink educational policy and practice given the context of multiple pandemics and engaging members as a leading voice on education issues.

This line item covers all of our non-personnel costs for preK-12 research and related activity, including:

- Convening meetings for participatory action research projects, providing co-investigator stipends when appropriate.
- Supporting policy-related presentations and workshops, data visualization services and related workshops, and transcription services.
- Meetings in the community for outreach to potential partners, with expenses such as food, materials, mileage and possibly locations for larger meetings.
- Lobbyist registration fees for CEPP staff and charges required for public record requests related to education policy issues.
- Costs to produce policy, practice and school finance research reports, as well as other materials and handbooks to explain policy issues, including the CEPP Explorer and thepolicymminute.com.
- Contracted research; conferences and related travel; expenses related to supporting individual members, such as the production and distribution of individual Professional Development Folders for members to track their work in meetings.

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded.

**Justification for Continuation of Program:** By supporting the work of CEPP and members engaged in policy development and advocacy, this funding helps to keep the voices and wisdom of educators at the center of education policy debates. Working with educators we can advocate for policies that improve the learning conditions for all students, particularly those that face the greatest challenges and the working conditions of educators that are essential to providing high-quality education to all students. Working with GR and other divisions, we support the affirmative policy agenda of the MTA, and reactive work, with high-quality research and analysis. To do so effectively, we also need to monitor and advocate with government agencies, and develop relationships across government and with other stakeholders, to make sure that the research of CEPP and the priorities of the MTA are shaping education policy in Massachusetts. Members view CEPP materials as valuable resources that provide clear and accurate information about policy and regulatory issues that directly affect their working lives.

LPPA Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
57 - Higher Education Research & Policy	30,000	0	30,000	30,000	0

**EXPENSE COMPONENTS:** This line item covers the costs for higher education policy research, reports and materials. Topics include the costs and related policy considerations of all elements of the Cherish Act, and related budget advocacy. It also includes work on contract parameters, early college issues, and other topics including Tomorrow's Educators.

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded

**Justification for Continuation of Program:** With voter approval of the Fair Share Amendment and the increased annual spending, we have an historic opportunity to provide public higher education educators, students and institutions with the resources needed to remove obstacles to success, including those rooted in systemic racism and economic inequality, so that educators can meet the needs of all students and all students can thrive. These funds give CEPP the capacity to work with locals to complete the research, coordination and advocacy work needed to advance that vision.

COMMUNICATIONS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
58 - Media / Policy Priorities	120,000	54,857	100,000	100,000	0

**EXPENSE COMPONENTS:** Costs for media and policy priorities include video and ad development, production and placement; a range of organizational polling, reports and projects; and other priorities involving internal and external media and materials (e.g., signs, buttons, and stickers), as determined by current needs. Covers non-capital costs of camera replacement/upgrading and associated equipment expenses. Also pays for our participation in the Commonwealth News Service, which generates positive publicity for the association through radio stories distributed to stations throughout the state; for communications training programs for members; and for some digital and design work.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation of Program:** This account allows us to move rapidly and decisively on ad and video production, paid social media campaigns, internal and external polling, and other priority areas (often involving public policy and public relations or internal media projects). As such, the Media/Policy Priorities Account provides a vital way for the MTA to rapidly convey and amplify messages about issues that relate to students, public schools, colleges and universities and to deal with organizing, policy, political and other Communications Division needs. As the MTA is targeted ever more aggressively by anti-public education forces while pursuing our own organizational and coalition goals, we must have the resources to promote our views and activities and respond to urgent challenges. All of our communications approaches are integral to the five Blueprint priorities; this account gives us the tools and resources to help build union and member power – including bargaining power – at the local and state levels, is key to promoting racial and social justice in diverse media and advances our policy positions through both analysis and strategic message dissemination.

COMMUNICATIONS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
59 - MTA Today	167,400	118,557	120,000	120,000	0

**EXPENSE COMPONENTS:** Printing, postage and associated costs to produce, publish and distribute three issues of MTA Today in print and in an enhanced e-book/website version for distribution to all members. Costs include graphics and photos for MTA Today that can also be used for other projects.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation of Program:** While reliance on electronic and digital communications continues to grow, polling of MTA membership in 2023 showed that many members are still getting a lot of their information from the print version of MTA Today, the association's flagship print publication. It is one component of our ability to engage members in the life of the union by providing legislative, campaign, and policy information, informing readers about internal governance matters and opportunities as well as leadership and committee opportunities and deadlines, and helping to enhance the image of public education by conveying the many ways that public school and college employees help Massachusetts students succeed. Particular attention is paid to making sure we show the diversity of our membership in photos and artwork. In carrying The MTA Advantage and MTAB-endorsed ads (which are paid for by MTAB), the publication also promotes our member-benefit programs.

COMMUNICATIONS Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
60 - Website / Digital Communications	165,000	157,522	165,000	165,000	0

**EXPENSE COMPONENTS:** Funds to maintain and improve MTA websites and online services. The budget line provides for technical support, website development coding, online surveys and calendars, internet security, server space for massteacher.org and local websites, domain renewals and purchases, licenses, and the content management system. It also covers contingencies for unexpected expenses and special project capacity such as the interfaces developed and adapted for Training and Professional Learning Division content.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation of Program:** The websites, mobile platforms, social media services and other digital communications vehicles operated, hosted and facilitated by the MTA are vital components of our outreach to, and interconnection with, both members and the public. In 2025, we plan to launch a new website, which could change, and even reduce, the costs of maintaining this platform while allowing us to create a fresher, more contemporary MassTeacher.org, which is also easier to navigate. At the same time, in order to best reach our audiences, we will need to put more funding into social media advertising since it is increasingly harder to make an impact on Facebook without putting money behind posts. This account also provides direct support to locals, including their ability to conduct member surveys and provides the resources that allow us to help locals and chapters develop, design, and host their own websites on a sophisticated WordPress platform.

LEGAL SERVICES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
61 - Auxiliary Support: Filing fees, transcript fees, expert costs, arbitrator fees in dismissal cases, etc.	160,000	72,242	140,000	120,000	(20,000)

**EXPENSE COMPONENTS:** This line item pays for case-related expenses incurred by both in-house and outside attorneys in the course of litigation, including transcripts, filing fees, sheriffs' fees, experts, outside copying/printing costs, arbitration costs (for job security cases such as dismissal or layoff), and other like expenses.

**Reasons for Expense Increase/Decrease:** There has been a consistent trend of lower expenses on this line. Since the costs of individual services are increasing it is prudent to reduce the budget only nominally. As we see this trend continuing, this seems like a prudent reduction.

**Justification for Continuation of Program:** Necessary expenses in cases where MTA-appointed attorneys represent members and locals.

**Related Revenue Line Item:** Line #5 NEA Legal Reimbursement / Line #6 Insurance & Court Reimbursement of Attorney's Fees

LEGAL SERVICES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
62 - Outside Attorney Fees – Legal	2,260,000	2,491,852	2,060,000	2,060,000	0

**EXPENSE COMPONENTS:** MTA's Legal Services Policy authorizes the assignment of attorneys to MTA affiliates and individual members in a wide range of legal areas. The volume and complexity of legal work remains very high and continues to exceed in-house capacity, resulting in a sustained overflow of legal work to outside attorneys. In addition to overflow, the Division uses outside counsel with specialized expertise (criminal, tax, real estate, workers' compensation and corporate).

**Reasons for Expense Increase/Decrease:** Based on 2024/25 data it looks like these expenses could decrease, however, there is a lot of novel litigation that is requiring more use of outside counsel for non-reimbursable expenses, and this may bloat the budget.

**Justification for Continuation of Expense:** Continued use of outside counsel is necessary given the scope of legal services provided, a litigious landscape in public education and labor law, and the commitment to quality legal representation that MTA has long maintained. Strong legal advocacy is an important element of the Blueprint priority of maximizing bargaining power and, at the same time, coordinating legal representation more closely with organizing efforts will increase a local's power and connect members to the life of the union.

**Related Revenue Line Item:** Line #5 NEA Legal Reimbursement / Line #6 Insurance & Court Reimbursement of Attorney's Fees

LEGAL SERVICES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
63 - Outside Attorney Fees, Workers Comp	300,000	329,104	300,000	300,000	0

**EXPENSE COMPONENTS:** This line item covers the cost of outside counsel to handle all workers' compensation cases for our members. Presently, we have a retainer agreement with O'Connor & Associates to handle all workers' compensation cases.

**Reasons for Expense Increase/Decrease:** Level funded

**Justification for Continuation of Expense:** Necessary to provide essential legal services.

**Related Revenue Line Item:** Line #9 Workers Compensation Reimbursement

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted Springfield	2023-2024 Actuals Springfield	2024-2025 Adopted Springfield	2025-2026 Proposed Springfield	Increase/Decrease From 2024-2025
64 - Annual Meeting - Expense	480,000	422,274	528,000	465,000	(63,000)

**EXPENSE COMPONENTS:** This line item funds all the expenditures necessary for a high-quality and engaging Annual Meeting, including Convention Center rental fee, parliamentary and steno typist fee, A/V, stage workers, drayage fee (chairs, booths, stage/ setup), security, electrical, sound, communication systems, badges, delegate handbook, budget book, scripts, signs/banners, special supplies, on-site printing, copier/printer rental, awards and gifts, lunches and breaks (for podium, committees and staff), special effects (includes backdrop), planning/debriefing meetings, on-site support (lodging, parking, meals, mileage), and logistical costs for pre-convention meetings. It also includes financial support for statewide retired district delegates, as well as regional Ethnic Minority Delegates. (See Annual Meeting Revenue above on line 9.)

**Reasons for Expense Increase/Decrease within Program Accounts:** Decreased funding due to reduction in actual costs.

**Justification for Continuation of Program:** The Annual Meeting of Delegates is required by the *MTA Bylaws and Standing Rules*. At this meeting, the approximately 1,800 delegates in attendance make important decisions regarding the affairs of the union, elect MTA officers, statewide and district directors, and executive committee members, debate and adopt the operating budget, adopt amendments to the Bylaws, Rules and Resolutions, hear featured speakers, bestow recognition awards, and debate and act on new business items.

**Related Revenue Line Item:** Line #10 Annual Meeting Revenue

<b>GOVERNANCE &amp; ADMINISTRATION Expense Line Item #</b>	<b>2023-2024 Adopted</b>	<b>2023-2024 Actual</b>	<b>2024-2025 Adopted</b>	<b>2025-2026 Proposed</b>	<b>Increase/Decrease From 2024-2025</b>
65 - Human Civil Rights Dinner & Awards – Expense	22,000	19,787	24,200	24,200	0

**EXPENSE COMPONENTS:** This line covers the costs of a venue, food, A.V. and other expenses associated with the HCR awards event. It also includes donations to charities identified by each awardee.

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded.

**Justification for Continuation of Program:** MTA’s Bylaws establish the promotion and protection of human and civil rights as a general objective of our organization. The charge of the Human Relations Committee is to select award recipients and, in collaboration with the Governance Division, design an awards program. Honoring the work of our MTA leaders of color is one important way to advance the Blueprint priority of racial, social and economic justice.

**Related Revenue Line Item:** Line #13 Human & Civil Rights Event Revenue

<b>GOVERNANCE &amp; ADMINISTRATION Expense Line Item #</b>	<b>2023-2024 Adopted</b>	<b>2023-2024 Actual</b>	<b>2024-2025 Adopted</b>	<b>2025-2026 Proposed</b>	<b>Increase/Decrease From 2024-2025</b>
66 - Board Meetings	176,000	166,683	193,600	212,960	19,360

**EXPENSE COMPONENTS:** This line funds the contractual and logistical costs to conduct meetings of the Board. Expenses for Board meetings vary with length of the meeting (1 or 2 days) and the venue selected, plus the cost of food, hotel rooms for Board and staff, A/V, copying, occasional fees for trainers and facilitators, and other miscellaneous expenses. Costs incurred for Executive Committee members to attend Board meetings are covered by this line item as well. The 75-member Board of Directors meets six times a year, with occasional special meetings to deal with pressing matters.

**Reasons for Expense Increase within Program Accounts:** Funding has been increased due to inflation. The Board has voted to resume in-person Board meetings for FY26.

**Justification for Continuation of Program:** The responsibility of the elected Board of Directors is in the MTA Bylaws and the MTA Policies. It makes important decisions regarding the affairs of the MTA when the Annual Meeting of Delegates is not in session.

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
67 - Other Board Activities	40,000	42,013	44,000	48,400	4,400

**EXPENSE COMPONENTS:** All Board of Director vouchered expenses, including meetings with MTA locals (travel and mileage and group meals), Annual Meeting and Summer Conference expenses (lodging, parking, mileage, tolls, and other meals), and the new Board orientation program are covered in this line item. Expenses for travel to additional MTA-sponsored statewide conferences, regional gatherings, committee meetings, and other events related to Board member responsibilities are also covered. Expenses may also include gifts, flowers and other authorized expenses incurred in the performance of MTA business.

**Reasons for Expense Increase/Decrease within Program Accounts:** Funding has been increased due to inflation.

**Justification for Continuation:** Board members do important work to build relationships with and among local leaders in their region as part of fulfilling their responsibilities. MTA provides reimbursement for reasonable expenses Board members incur in connection with that work. When Board members communicate regularly with local presidents and rank-and-file members, they play an important role in the Blueprint priority of connecting members to the life of the union.

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
68 - Executive Committee Meetings	27,500	23,544	30,250	31,750	1,500

**EXPENSE COMPONENTS:** This line item covers facilities, food and beverage, A.V., and all associated meeting expenses for Executive Committee (EC) meetings. When possible, EC meetings are held at an MTA office or in conjunction with another MTA program to reduce costs. Meetings include a three-day retreat.

**Reasons for Expense Increase/Decrease within Program Accounts:** Funding has been increased due to inflation. The EC may continue to hold a portion of its meetings virtually.

**Justification for Continuation of Program:** The Executive Committee is established in the MTA Bylaws. It is an important elected MTA decision-making body, and its duties are prescribed in the MTA Bylaws and the MTA Policies.

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
69 - Other Executive Committee Activities	11,000	14,748	12,100	15,000	2,900

**EXPENSE COMPONENTS:** All Executive Committee vouchered expenses including travel and mileage, internet costs and groups meals for meetings with the Board of Directors. Executive Committee members' expenses for Annual Meeting (lodging, parking, mileage, tolls, other meals); Summer Conference (mileage, tolls, housing, other meals) and the New Board Orientation program in August (when applicable). Miscellaneous expenses including expenses for subcommittees and other meetings and organizational events, county and local meetings, region/district meetings, mileage and travel for attendance at MTA-sponsored statewide and regional conferences. Postage, supplies, and other authorized expenses incurred in the performance of Association business.

**Reasons for Expense Increase/Decrease within Program Accounts:** Increased funding will enable Executive Committee members to do important outreach work in addition to attending Executive Committee and Board meetings. MTA provides reimbursement for reasonable expenses that Executive Committee members incur in connection with that work. This also accounts for inflation.

**Justification for Continuation:** Executive Committee members do important work to build relationships with and among local leaders in their region as part of fulfilling their responsibilities. MTA provides reimbursement for reasonable expenses EC members incur in connection with that work. When Board members communicate regularly with local presidents and rank-and-file members, they play an important role in the Blueprint priority of connecting members to the life of the union.

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
70 - Local Presidents Meetings	36,000	43,881	39,600	49,000	9,400

**EXPENSE COMPONENTS:** This line item covers expenses, mostly venues and food, for local, regional, and statewide local Presidents' meetings. In addition to the traditional in-person gatherings, some meetings may be held virtually, making it easier for presidents from remote locals to attend.

**Reasons for Increase/Decrease:** The 10% increase reflects higher hotel expenses as the travel industry rebounds after the pandemic, tighter supplies given fewer hotel rooms under construction due to suspensions in the supply chain, rising interest rates and high inflation.

**Justification for Continuation of Program:** The local presidents' meetings (regional and statewide) enhance the vital connection and communication between MTA leaders and the presidents who lead our locals.

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
71 - President's Special Projects	8,000	7,987	8,800	8,800	0
72 - National Conferences	27,500	27,403	30,250	30,250	0
73- Special Interest Conferences	27,500	13,916	30,250	30,250	0
TOTALS	63,000	49,306	69,300	69,300	0

**EXPENSE COMPONENTS:** The President approves expenditures from these line items. President's Special Projects refers to the MTA President's discretionary fund, often used to invite out-of-town guests to MTA events or to support unique member and local activities. The conferences line makes it possible for MTA members to attend a wide array of NEA national conferences and other conferences of interest.

**Reasons for Expense Increase:** Level funded.

**Justification for Continuation:** Helping to cover the costs of special events and conferences provides growth experiences for our leaders and emerging leaders. Also, the president of a 117,000-member union will always be presented with miscellaneous events, guests and requests for which a small discretionary budget is warranted.

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
74 - NEA Delegate Stipends:	286,500	284,675	286,500	286,500	0
Local Stipends	72,000	1,600	72,000	72,000	0
S, R&R Stipends	208,000	283,075	208,000	208,000	0
NEA-R Annual Mtg.	6,500	0	6,500	6,500	0
TOTALS	286,500	284,675	286,500	286,500	0

**EXPENSE COMPONENTS:** This program funds stipends for statewide, regional, retired, student and local delegates to the NEA Representative Assembly (RA). This line also funds the attendance of 12 retired delegates at the NEA Retired Annual Meeting, which precedes the RA.

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded.

**Justification for Continuation of Program:** MTA's delegates to the NEA Representative Assembly are our voice in the political, policy, financial and organizational issues that come before the NEA RA, as well as at the NEA Retired Annual Meeting.

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted Orlando	2023-2024 Actuals Orlando	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
75 - NEA Convention - Expenses	82,500	18,766	90,750	90,750	0

**EXPENSE COMPONENTS:** Expenses for the Massachusetts caucus meetings and on-site programs for delegates at the NEA-RA include hotel meeting room, breakfast, A/V, equipment rental, supplies, shipping and specialty items. A delegate handbook is also produced.

**Reasons for Expense Increases within Program Accounts:** Level funded.

**Justification for Continuation of Program:** MTA's delegates to the NEA Representative Assembly are our voice in the political, policy, financial and organizational issues which come before the NEA RA. The Massachusetts caucus meets each morning to conduct business and vote on positions to be taken on the convention floor.

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted	2023-2024 Actuals	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
76 – MTA & NEA Elections	55,366	54,134	58,134	58,134	0

**EXPENSE COMPONENTS:** This line provides funding for MTA's elections throughout the year except for elections held at Annual Meeting. Elections include the all-member election of NEA Directors, Alternate NEA Directors, NEA delegates (statewide, regional, retired & student), statewide retired district delegates and regional ethnic minority delegates to the MTA Annual Meeting. This line also provides funding for interim elections for executive committee and district director vacancies, and postage for special electoral mailings.

**Reasons for Expense Increases within Program Accounts:** Level funded.

**Justification for Continuation of Program:** In order to send delegates to the NEA RA and elect statewide delegates to the MTA Annual Meeting, both of which are provided for in the MTA Bylaws and the MTA Policies, we must conduct elections which comply with NEA's various requirements and the Landrum-Griffin Act. MTA Bylaws require that MTA officer elections be conducted at Annual Meeting.

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
77 - Committees	150,000	69,718	150,000	150,000	0

**EXPENSE COMPONENTS:** This line funds the meeting and travel expenses of 30-plus MTA committees comprised of committees of the Bylaws, policy committees, program committees, special project groups, temporary task forces, and one All Chairs meeting.

The Annual Meeting adopts a total budget for all committees. Then, in October, the MTA Board adopts line-item committee budgets for the current fiscal year based on the total committee budget adopted by the Annual Meeting.

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded.

**Justification for Continuation of Program:** Committees are required under MTA bylaws and policies. They are an essential way that member activists lead the work of the MTA to advance all of the Blueprint priorities: connecting members to the life of the union (importantly, to the statewide union in this instance), cultivating leadership at all levels, maximizing bargaining power, advancing policy solutions and campaigns, and leading on economic, social, and racial justice.

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
78 - Projects, Coalitions & Annual Donations	70,000	97,854	60,000	60,000	0

**EXPENSE COMPONENTS:** This line funds annual donations to the organizations listed below.

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded.

**Justification for Continuation of Program:** This expense line covers annual donations to Citizens for Public Schools (\$30,000), MassCare (\$10,000), NAACP (\$10,000), and City Life Vida Urbana (\$10,000). The partnerships we build through the community organizations we support strengthen our ability to advance policy solutions and campaigns and work in coalition to organize for equity and a common good agenda.

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
79 - Discretionary Donations	70,000	62,700	70,000	70,000	0

**EXPENSE COMPONENTS:** This line funds discretionary donations.

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded.

**Justification for Continuation of Program:** The partnerships we build through the community organizations we support strengthen our ability to advance policy solutions and campaigns and work in coalition to organize for equity and a common good agenda.

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
80 - Massachusetts Child Donation	20,000	20,000	20,000	20,000	0

**EXPENSE COMPONENTS:** This line funds the Massachusetts Child donation.

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded.

**Justification for Continuation of Program:** Continued annual donation to Massachusetts Child.

GOVERNANCE & ADMINISTRATION Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
81- AFL/CIO Membership Dues	250,000	234,932	250,000	300,000	50,000

**EXPENSE COMPONENTS:** This line covers AFL-CIO dues for MTA locals. Given the number of members in our affiliated locals, MTA is entitled to two seats on the State Council of the Massachusetts AFL-CIO, held by the MTA president and vice president. Each affiliated local also has the opportunity to participate as a voting member in their region's Central Labor Council/Area Labor Federation.

**Reasons for Increase/Decrease within Program Accounts:** Increased in order to change the way MTA membership is charged by AFL-CIO.

**Justification for Continuation of Program:** As the largest union in New England, MTA plays a pivotal role in the Massachusetts labor movement. The opportunity to participate in the AFL-CIO and build relationships and solidarity with almost every union in the state is invaluable. Examples of how MTA has benefitted from this strong alliance include rallying behind Question 2 to fight charter school expansion, actions relative to GIC design changes, and broad support for the Fair Share Amendment. Our active participation in the larger Massachusetts labor movement is especially important to the Blueprint priorities of maximizing our bargaining power and advancing policy solutions and campaigns.

HUMAN RESOURCES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
82 - Internal Employee/ Management Meetings	28,000	20,996	28,000	28,000	0

**EXPENSE COMPONENTS:** Includes management strategic planning meetings, joint labor/management meetings and retreats. Costs are for meeting space, meals and presenters.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation of Program:** Educational programs and planning meetings for staff and managers, as well as multiple JLMCs, are essential to effective management, fostering employee morale, and maintaining positive labor/management relationships.

HUMAN RESOURCES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
83 – All-Staff Meetings	25,000	35,364	25,000	40,000	15,000

**EXPENSE COMPONENTS:** Covers trainers, guest speakers, facilities, food and materials for All-Staff meetings. There are three All-Staff Meetings annually.

**Reasons for Expense Increase/Decrease:** Increase due to market increase of expenses when organizing events.

**Justification for Continuation of Program:** All-staff meetings are one of the few times that almost the entire staff from around the state comes together, an important part of fostering employee morale and solidarity. They also will be the venue for continued employee education and engagement on diversity, inclusion and racial justice. One meeting includes Service Awards, MTA's employee recognition program. Outside facilities are needed because of the size of the group.

HUMAN RESOURCES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
84 - Training & Tuition Reimb- Staff	100,000	188,975	100,000	110,000	10,000

**EXPENSE COMPONENTS:** Training and tuition reimbursement to encourage professional development and as required in staff union contracts.

**Reasons for Expense Increase/Decrease:** Adjustment for FY25-26 incorporates KnowBe4 training platform and coverage from previous fiscal actual.

**Justification for Continuation of Program:** It is important to provide professional development training to enhance employee skills, growth opportunities and retention.

HUMAN RESOURCES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
85 - Employee Engagement and Recognition	20,000	21,350	20,000	35,000	15,000

**EXPENSE COMPONENTS:** Employee recognition involves acknowledgements related to employee life events such as birthdays and anniversaries, bereavement, retirement, childbirth/adoption, a contribution to retirement parties, memorial donations and flowers. Employee engagement activities also include events coordinated by our employee-driven Events & Social Committee, such as a holiday party and annual summer outing.

**Reasons for Expense Increase/Decrease within Program Accounts:** Increase due to market increase of expenses when organizing events.  
**Justification for Continuation of Program:** MTA's hardworking staff deserves to be recognized and appreciated. These programs are important for employee morale and engagement.

HUMAN RESOURCES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
86 - Recruitment	45,000	43,936	60,000	45,000	(15,000)

**EXPENSE COMPONENTS:** This line covers costs for print and web-based recruitment and community outreach for vacant MTA positions.

**Reasons for Expense Increase/Decrease within Program Accounts:** Decreased to reflect actual experience.

**Justification for Continuation of Program:** Part of MTA's work related to the Blueprint priority of leading on racial, economic and social justice includes recruiting and hiring candidates from diverse backgrounds.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
87 - Office Supplies/Small Equip	134,750	144,950	134,750	141,750	7,000

**EXPENSE COMPONENTS:** General office supplies for all MTA offices.

**Reasons for Expense Increase/Decrease:** Increased to reflect actual experience.

**Justification for Continuation of Expense:** Necessary business expense.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
88 - Equipment Maintenance/Leasing	181,900	379,856	219,000	320,800	101,800

**EXPENSE COMPONENTS:** Leasing and maintenance contracts for office copiers, printing and mailing equipment for the print shop, as well as maintenance contracts and cybersecurity protection on all MTA computers.

**Reasons for Expense Increase/Decrease:** Increased to reflect actuals.

**Justification for Continuation of Expense:** Necessary business expense.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
89 - Computer Leasing	40,000	8,845	40,000	40,000	0

**EXPENSE COMPONENTS:** The total lease costs are split for budgetary purposes to comply with generally accepted accounting principles. A portion of the cost is charged to this account and the remainder of the cost is charged to our balance sheet liability for capital leases.

**Reasons for Expense Increase/Decrease within Program Accounts:** Level funded.

**Justification for Continuation of Program:** Computer technology updates enhance employee productivity capacity and the ability to deliver high-quality service in all parts of the organization.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
90 - Internet Connectivity	28,000	33,566	28,000	33,600	5,600

**EXPENSE COMPONENTS:** Internet access for the entire organization.

**Reasons for Expense Increase/Decrease:** Increased to reflect actuals.

**Justification for Continuation:** Necessary business expense.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
91 - Equipment Repairs – (P&M)	4,500	7,077	4,500	4,500	0

**EXPENSE COMPONENTS:** Repairs not covered by service contracts.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation of Expense:** Necessary business expense.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
92 - Software Packages	272,000	373,740	361,500	410,000	48,500

**EXPENSE COMPONENTS:** Enterprise software and various computer software packages, upgrades and licensing renewals.

**Reasons for Expense Increase/Decrease:** Increased to cover actuals as well as licenses needed for additional staff members and for BOD and Committee chair accounts added during FY25.

**Justification for Continuation:** Necessary business expense.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
93 - Insurance – APL Policy	18,000	17,214	18,000	18,000	0

**EXPENSE COMPONENTS:** The Association Professional Liability (APL) policy covers the cost of MTA participation in an NEA insurance program, which covers state and local affiliate staff and governance (along with the NEA) for payment of damages in lawsuits alleging negligence. The premium is based on the number of MTA members.

**Reasons for Expense Increase/Decrease:** Level funded. Actual policy cost in current year is \$17,503.

**Justification for Continuation:** Necessary expense in the event negligence claims are brought against MTA locals or staff. The Massachusetts Bar Association requires insurance coverage for practicing attorneys. We have separate coverage for MTA and its officers under a directors and officers' policy funded in the corporate insurance line.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
94 - Offsite Storage	10,700	11,484	10,700	11,500	800

**EXPENSE COMPONENTS:** Storage of miscellaneous equipment and supplies for annual events, as well as office furniture and printed materials.

**Reasons for Expense Increase/Decrease:** Increased to reflect actuals.

**Justification for Continuation:** Necessary business expense.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
95 - Bank Service Fees	20,000	7,297	20,000	18,000	(2,000)

**EXPENSE COMPONENTS:** Bank fees.

**Reasons for Expense Increase/Decrease:** Reduced to reflect actual past experience and projected 2025 amount of \$17,000.

**Justification for Continuation:** Necessary business expense.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
96 - MTAB- Hanover & Liberty Mutual Property Casualty Advertising Fee	20,000	20,000	20,000	20,000	0

**EXPENSE COMPONENTS:** MTA's share of the cost of marketing the Hanover & Liberty Mutual Property/Casualty insurance programs, managed and performed by MTAB staff.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation:** These insurance programs are valued by our members and generate revenue for the MTA.

**Related Revenue Line Item:** Line #16 Property and Casualty Endorsement and Royalty Income

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
97 - Corporate Insurance	130,000	154,425	145,000	145,000	0

**EXPENSE COMPONENTS:** Includes standard commercial policy, automobile policy, umbrella liability policy, fiduciary liability policy, crime policy, internet media, directors' and officers' coverage, and other liability coverage.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation:** Necessary business expense to reduce risk in connection with MTA property and operations.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
98 - Postage & Delivery	75,000	73,046	75,000	75,000	0

**EXPENSE COMPONENTS:** Postage and delivery expenses for MTA offices.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation:** Necessary business expense.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
99 - Paper	21,542	67,169	21,542	67,000	45,458

**EXPENSE COMPONENTS:** Cost of paper used in producing printed documents.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation:** Necessary business expense.

**Related Revenue Line Item:** Line #12 Printing Income

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
100 - Dues	35,000	5,519	70,000	70,000	0

**EXPENSE COMPONENTS:** Membership dues to organizations and associations for MTA staff.

**Reasons for Expense Increase/Decrease:** Level funded. Prior increase due to transfer of \$10,000 NCSEA (National Council of State Education Association) dues from Policy, Documents, Projects, Coalitions & Donations (line 82) and subsequent \$25,000 increase in dues.

**Justification for Continuation:** Involvement in professional organizations enhances staff knowledge and builds valuable relationships.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
101 - Subscriptions	125,000	132,725	125,000	100,600	(24,400)

**EXPENSE COMPONENTS:** MTA maintains a legal library in the Legal Division and subscribes to various online research systems. Also includes subscriptions for other MTA divisions.

**Reasons for Expense Increase/Decrease:** Decreased based on identified duplicative subscriptions.

**Justification for Continuation:** Essential to the efficient delivery of high-quality legal services by staff attorneys and to maintain skill and competency level of staff in other divisions.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
102 - Records Retention	50,000	90,784	65,000	65,000	0

**EXPENSE COMPONENTS:** Storage of records at secure off-site location.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation:** Necessary business expense. We need to retain hard copies of some records, such as Legal Division case files.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
103 - Depreciation	400,000	613,165	400,000	400,000	0

**EXPENSE COMPONENTS:** Reflects depreciation expense on fixed assets, per generally accepted accounting principles. All assets are included except Quincy buildout costs, which were financed through building sale proceeds. Costs of annual capital expenditures are spread over the useful life of the assets rather than charged in full in the year of acquisition.

**Reasons for Expense Increase/Decrease:** Level funded.

**Justification for Continuation:** Necessary business expense.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
104 - Contingency	809,686	0	334,047	265,992	(68,055)

**EXPENSE COMPONENTS:** This account provides resources for contingencies. Expenditures from this account require a vote of the Executive Committee.

**Reasons for Expense Increase/Decrease:** The contingency line covers two categories (1) unanticipated expenses (“true contingencies”) and (2) costs that are anticipated but are too uncertain to include in a line item or are not yet allocated. This year’s contingency includes raise contingency for non-unit employees. The 24-25 budget included funds for president and vice president’s expenses, reinstated on lines 24 & 25 in FY26.

**Justification for Continuation:** Necessary for contingencies.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
105 – Reserve Strengthening Fund	0	0	0	0	0

**EXPENSE COMPONENTS:** This account provides resources for reserve strengthening and replenishment.

**Reasons for Expense Increase/Decrease:** New line item to begin reserve replenishment after spending on organizational initiatives.

**Justification for Continuation:** Necessary for building reserves for use in future unbudgeted organizational initiatives.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
106 - Unrelated Business Income Tax	22,000	171,878	30,000	90,000	60,000

**EXPENSE COMPONENTS:** “Unrelated business income” is income from activities that the IRS considers to be distinct from MTA’s normal activities (e.g. printing income, advertising income and income from MTAB).

**Reasons for Expense Increase/Decrease:** Increased to reflect new UBIT interpretation guidance from our CPAs that includes taxes on royalty income from the property and casualty insurance program written through EIA. A consideration to move this revenue to MTAB should be explored.

**Justification for Continuation:** Legal requirement.

ADMINISTRATIVE EXPENSES Expense Line Item #	2023-2024 Adopted	2023-2024 Actual	2024-2025 Adopted	2025-2026 Proposed	Increase/Decrease From 2024-2025
107 - Increased Campaign Capacity	1,184,430	0	2,063,872	0	(2,063,872)

**EXPENSE COMPONENTS:** This is a contingency line item devoted to funding recommendations for increased staff capacity in support of statewide and local campaigns.

**Reasons for Expense Increase/Decrease:** This fund was used to expand campaign capacity by hiring additional staff for local and statewide campaigns. These funds are now reflected in salary and benefits.

**Justification for Continuation:** Increased local and state campaigns require increased campaign staff support. When these staff are added this line will be moved into salary and benefits.

# SECTION 7



MASSACHUSETTS TEACHERS ASSOCIATION										
2025-2026										
FIELD & ORGANIZING COMBINED										
REGIONAL CENTERS, HIGHER EDUCATION, F&O PROGRAM MANAGEMENT, ORGANIZERS										
LN	REF	ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024 BUDGET	PROPOSED BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25		
<b>REVENUE</b>										
1	MEMBERSHIP DUES	17,879,455	17,674,132	19,440,010	21,463,771	2,023,761	2,023,761	10.41%		
	Affiliation Dues									
	<b>TOTAL MEMBERSHIP DUES</b>	<b>17,879,455</b>	<b>17,674,132</b>	<b>19,440,010</b>	<b>21,463,771</b>	<b>2,023,761</b>	<b>2,023,761</b>	<b>10.41%</b>		
<b>PROGRAM REVENUE</b>										
2	NEA UniServ Funding - Full/Time	2,552,367	2,730,634	2,923,220	3,433,793	510,573	510,573	17.47%		
3	NEA UniServ Funding - Part/Time	127,674	166,980	312,855	235,815	(77,040)	(77,040)	-24.62%		
4	NEA Funds - Project / Grant Revenue	75,000	268,978	225,000	225,000	0	0	0.00%		
	Total Program Revenue	2,755,041	3,166,592	3,461,075	3,894,608	433,533	433,533	12.53%		
	<b>TOTAL OPERATING REVENUE</b>	<b>20,634,496</b>	<b>20,840,724</b>	<b>22,901,085</b>	<b>25,358,379</b>	<b>2,457,294</b>	<b>2,457,294</b>	<b>10.73%</b>		
<b>EXPENSES</b>										
<b>SALARIES &amp; FRINGE BENEFITS</b>										
1	Salaries	10,278,390	10,910,352	11,609,947	13,367,020	1,757,073	1,757,073	15.13%		
2	Wages	1,324,624	1,288,776	1,438,195	1,592,028	153,833	153,833	10.70%		
3	Part-time Staff	115,000	59,308	115,000	115,000	0	0	0.00%		
4	Overtime	9,000	24,182	9,000	7,000	(2,000)	(2,000)	-22.22%		
5	FICA	886,384	936,022	1,085,252	1,140,421	55,169	55,169	5.08%		
6	Pension	3,488,367	674,109	3,447,552	3,347,446	(100,206)	(100,206)	-2.91%		
7	Health & Dental Insurance	2,111,413	2,918,161	2,702,708	2,785,079	82,371	82,371	3.05%		
8	Post Retirement Health Insurance	209,060	0	240,643	227,479	(13,164)	(13,164)	-4.47%		
9	Life Insurance	63,704	0	71,840	64,263	(7,577)	(7,577)	-10.55%		
10	Short and Long Term Disability & Paid Family Medical Leave	97,642	0	129,748	123,681	(6,067)	(6,067)	-4.68%		
11	State/Federal Unemployment Tax/Univ Hlth	39,255	93,762	39,947	35,947	(4,000)	(4,000)	-10.01%		
	Temporary Help	0	28,188	0	0	0	0	0.00%		
12	Worker's Compensation	13,549	0	15,998	15,499	(499)	(499)	-3.12%		
	Total Salaries & Fringe Benefits	18,636,388	16,932,830	20,905,930	22,820,863	1,914,933	1,914,933	9.16%		
<b>CONTRACTED SERVICES &amp; PROF FEES</b>										
13	Consultants	75,000	0	75,000	75,000	0	0	0.00%		
	Total Contracted Svcs & Prof Fees	75,000	0	75,000	75,000	0	0	0.00%		
<b>FACILITIES &amp; TELEPHONE</b>										
18	Telephone	33,000	36,836	25,500	25,500	0	0	0.00%		
19	Rent	560,894	596,632	571,065	584,636	13,571	13,571	2.38%		
20	Janitorial Supplies/Services	41,440	32,222	45,460	32,222	(13,238)	(13,238)	-29.12%		
21	Utilities and Operating Expenses - Leaseholds	86,545	66,131	83,500	66,129	(17,371)	(17,371)	-20.80%		
	Total Facilities & Telephone	721,879	731,821	725,525	708,487	(17,038)	(17,038)	-2.35%		
<b>BUSINESS EXPENSES</b>										
22	Travel - Mileage	199,994	218,411	199,995	219,994	19,999	19,999	10.00%		
23	Travel - Miscellaneous Expenses & Parking	105,012	253,077	105,012	195,012	90,000	90,000	85.70%		
	Total Transportation & Travel	305,006	471,488	305,007	415,006	109,999	109,999	36.06%		

MASSACHUSETTS TEACHERS ASSOCIATION									
2025-2026									
FIELD & ORGANIZING COMBINED									
REGIONAL CENTERS, HIGHER EDUCATION,									
F&O PROGRAM MANAGEMENT, ORGANIZERS									
LN	REF	ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25		
<b>PROGRAM EXPENSES</b>									
26		425,000	584,917	425,000	750,000	325,000	76.47%		
27		35,000	14,678	35,000	35,000	0	0.00%		
28		14,773	12,948	14,773	24,773	10,000	67.69%		
29		40,000	2,600	10,000	5,000	(5,000)	-50.00%		
30		90,000	73,344	90,000	75,000	(15,000)	-16.67%		
32		100,000	117,868	100,000	100,000	0	0.00%		
33		50,000	110,653	50,000	125,000	75,000	150.00%		
34		5,000	0	0	5,000	5,000	100.00%		
35		25,000	42,023	25,000	25,000	0	0.00%		
36		10,000	13,830	10,000	15,000	5,000	50.00%		
37		21,600	21,000	32,000	32,000	0	0.00%		
		816,373	1,067,221	791,773	1,191,773	400,000	4		
<b>ADMINISTRATIVE EXPENSES</b>									
87		29,750	44,741	29,750	40,750	11,000	36.97%		
88		35,500	90,264	35,500	84,000	48,500	136.62%		
92		0	10,055	18,000	14,000	(4,000)	-22.22%		
98		8,000	88	8,000	8,000	0	0.00%		
100		500	609	500	500	0	0.00%		
101		6,100	3,438	6,100	0	(6,100)	-100.00%		
		79,850	149,195	97,850	147,250	49,400	50.49%		
		20,634,496	19,352,555	22,901,085	25,358,379	2,457,294	10.73%		
		0	1,488,169	0	0	0			
<b>DIVISION STAFF / SALARIES &amp; WAGES / HEADCOUNT = 95.5</b>									
					\$203,083				
					\$979,351				
					\$156,222				
					\$9,135,712				
					\$1,698,462				
					\$126,854				
					\$178,254				
					\$163,568				
					\$534,762				
					\$178,254				
					\$141,936				
					\$1,144,585				
					\$115,000				

MASSACHUSETTS TEACHERS ASSOCIATION 2025-2026												
FIELD & ORGANIZING BY SERVICE CENTER												
REGIONAL OFFICES, HIGHER EDUCATION, F&O PROGRAM MANAGEMENT, ORGANIZERS												
REGIONAL SERVICE CENTERS												
	CENTRAL	METRO	NORTHEAST	SOUTHEAST	HOLYOKE	PITTSFIELD	HIGHER EDUCATION	ORGANIZERS	PROGRAM MANAGEMENT			
LN REF	REVENUE	MEMBERSHIP DUES	MEMBERSHIP DUES	Affiliation Dues	TOTAL MEMBERSHIP DUES	PROGRAM REVENUE	NEA UniServ Funding - Full/Time	NEA UniServ Funding - Part/Time	NEA Funds -Project / Grant Revenue	Total Program Revenue	TOTAL OPERATING REVENUE	EXPENSES
1	21,463,771	2,816,416	2,381,435	2,810,293	2,744,732	2,369,416	707,874	3,159,314	2,664,196	1,810,095		
2	3,433,793	0	0	0	0	0	0	0	0	0	3,433,793	
3	235,815	0	0	0	0	0	0	0	0	0	235,815	
4	225,000	0	0	0	0	0	0	0	0	0	225,000	
	3,894,608	0	0	0	0	0	0	0	0	0	3,894,608	
	25,356,379	2,816,416	2,381,435	2,810,293	2,744,732	2,369,416	707,874	3,159,314	2,889,196	5,479,703		
<b>EXPENSES</b>												
<b>SALARIES &amp; FRINGE BENEFITS</b>												
1	13,367,020	1,495,635	1,332,578	1,494,126	1,502,481	1,250,778	358,509	1,891,357	1,698,462	2,343,094		
2	1,592,028	165,722	146,674	173,963	164,869	180,332	61,639	86,226	300,000	312,603		
3	115,000	0	0	0	0	0	0	0	0	115,000		
4	7,000	1,000	1,000	1,000	1,000	1,000	0	1,000	0	1,000		
5	1,140,421	126,369	113,102	127,017	126,831	108,622	31,875	150,293	152,614	203,698		
6	3,474,446	379,306	338,208	380,994	380,986	328,411	95,603	451,225	388,328	606,385		
7	2,785,079	368,953	211,050	354,461	286,078	317,712	60,274	405,315	253,516	527,720		
8	227,479	26,202	26,202	26,202	26,202	21,437	5,954	28,583	28,584	38,112		
9	64,263	7,282	6,487	7,313	7,310	6,273	1,841	8,666	7,446	11,645		
10	123,681	14,019	12,483	14,062	14,067	12,076	3,545	16,685	14,333	22,411		
11	35,947	3,774	3,773	3,773	3,773	3,086	1,082	4,116	4,116	8,454		
12	15,499	1,757	1,565	1,765	1,764	1,513	442	2,090	1,797	2,806		
	22,820,863	2,590,019	2,193,122	2,584,676	2,515,362	2,229,240	620,764	3,045,556	2,849,196	4,192,928		
<b>CONTRACTED SERVICES &amp; PROF FEES</b>												
13	75,000	0	0	0	0	0	0	0	0	75,000		
	75,000	0	0	0	0	0	0	0	0	75,000		
<b>FACILITIES &amp; TELEPHONE</b>												
18	25,500	3,900	0	6,100	5,000	4,000	6,500	0	0	0		
19	584,636	117,686	103,513	128,831	136,782	50,064	34,500	13,260	0	0		
20	32,222	11,250	0	1,065	10,679	7,200	2,028	0	0	0		
21	66,129	17,060	11,800	13,121	6,907	5,910	10,331	0	0	0		
	708,487	149,896	115,313	149,117	159,368	68,174	53,359	13,260	0	0		
<b>BUSINESS EXPENSES</b>												
22	219,994	24,000	23,998	23,999	23,999	24,001	9,999	29,998	40,000	20,000		
23	195,012	25,001	25,002	25,001	25,003	25,001	15,002	30,000	0	25,002		
	415,006	49,001	49,000	49,000	49,002	49,002	25,001	59,998	40,000	45,002		

MASSACHUSETTS TEACHERS ASSOCIATION													
2025-2026													
FIELD & ORGANIZING BY SERVICE CENTER													
REGIONAL OFFICES, HIGHER EDUCATION, F&O PROGRAM MANAGEMENT, ORGANIZERS													
LN REF	PROPOSED 2025-2026 BUDGET	REGIONAL SERVICE CENTERS					HIGHER EDUCATION	ORGANIZERS	PROGRAM MANAGEMENT				
		CENTRAL	METRO	NORTHEAST	SOUTHEAST	HOLYOKE				PITTSFIELD			
		PROGRAM EXPENSES											
26	State and Local Organizing	750,000	0	0	0	0	0	0	0	0	0	0	750,000
27	Higher Ed Membership Data Reimbursement	35,000	0	0	0	0	0	0	0	35,000	0	0	0
28	Large Locals	24,773	0	0	0	0	0	0	0	0	0	0	24,773
29	Health & Welfare Initiatives Consultant	5,000	0	0	0	0	0	0	0	0	0	0	5,000
30	Indoor Air Quality/Workplace Health/Safety Consultant	75,000	0	0	0	0	0	0	0	0	0	0	75,000
32	Membership Materials/I.D. Cards	100,000	0	0	0	0	0	0	0	0	0	0	100,000
33	Staff Meetings/Training (P&O)	125,000	0	0	0	0	0	0	0	0	0	0	125,000
34	Higher ED Leadership Meetings	5,000	0	0	0	0	0	0	0	5,000	0	0	0
35	MTA Reporter (Retired)	25,000	0	0	0	0	0	0	0	0	0	0	25,000
36	Membership Recruitment	15,000	0	0	0	0	0	0	0	0	0	0	15,000
37	Contract Data Research System	32,000	0	0	0	0	0	0	0	0	0	0	32,000
	Total Program Expenses	1,191,773	0	0	0	0	0	0	0	40,000	0	0	1,151,773
	ADMINISTRATIVE EXPENSES												
87	Office Supplies / Small Equipment	40,750	9,000	11,000	9,000	5,000	750	0	0	0	0	0	1,000
88	Equipment Maintenance/Leasing	84,000	16,500	13,000	16,500	14,000	17,000	7,000	0	0	0	0	0
92	Software Packages	14,000	0	0	0	0	0	0	0	0	0	0	14,000
98	Postage and Delivery	8,000	2,000	0	2,000	2,000	1,000	1,000	0	0	0	0	0
100	Dues	500	0	0	0	0	0	0	0	500	0	0	0
101	Subscriptions	0	0	0	0	0	0	0	0	0	0	0	0
	Total Administrative Expenses	147,250	27,500	24,000	27,500	21,000	23,000	8,750	500	0	0	0	15,000
	TOTAL EXPENSES	25,358,379	2,816,416	2,381,435	2,810,293	2,744,732	2,369,416	707,874	3,159,314	2,889,196	0	0	5,479,703
	NET INCOME (LOSS)	0	0	0	0	0	0	0	0	0	0	0	0
	DIVISION STAFF / SALARIES & WAGES / HEADCOUNT = 95.5												
	Director, Field & Organizing	\$203,083											
	Regional Manager (5)	\$979,351											
	Health & Safety Organizer	\$156,222											
	Field Rep/Organizer (55)	\$9,135,712											
	Regional Organizer (12)	\$1,698,462											
	ESP Organizer	\$126,854											
	New Member/ SEAM Organizer	\$178,254											
	Retired Member Organizer	\$163,568											
	Bargaining Strategists (3)	\$534,762											
	Membership Data Strategist	\$178,254											
	Data Specialist	\$141,936											
	Coordinator (13.5)	\$1,144,585											
	Part Time Regional Representatives (35)	\$115,000											

MASSACHUSETTS TEACHERS ASSOCIATION									
2025-2026									
LEGISLATION, POLICY AND POLITICAL ACTION COMBINED									
GRASSROOTS CAMPAIGNS, GOVERNMENT RELATIONS, CENTER FOR EDUCATION POLICY AND PRACTICE (CEPP)									
LN REF	ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25			
<b>REVENUE</b>									
<b>MEMBERSHIP DUES</b>									
1	Affiliation Dues	4,192,149	4,166,092	4,484,724	4,694,097	209,373	4.67%		
	TOTAL MEMBERSHIP DUES	4,192,149	4,166,092	4,484,724	4,694,097	209,373	4.67%		
<b>PROGRAM REVENUE</b>									
2	NEA Uniserv Funding - Full time	41,141	0	0	0	0	100.00%		
3	NEA Uniserv Funding - Part time	94,622	127,766	0	0	0	0.00%		
4	NEA Funds - Project/Grant Revenue	0	150,000	0	0	0	0.00%		
	Total Program Revenue	135,763	277,766	0	0	0	100.00%		
	TOTAL OPERATING REVENUE	4,327,912	4,443,858	4,484,724	4,694,097	209,373	4.67%		
<b>EXPENSES</b>									
<b>SALARIES &amp; FRINGE BENEFITS</b>									
1	Salaries	1,396,501	1,445,738	1,642,954	1,714,267	71,313	4.34%		
2	Wages	314,105	262,445	241,754	280,831	39,077	16.16%		
3	Part Time Staff	337,500	313,400	450,000	450,000	0	0.00%		
4	Overtime	9,000	4,718	9,000	4,500	(5,001)	-55.57%		
5	FICA	155,457	175,154	175,114	186,528	11,414	6.52%		
6	Pension	526,654	101,764	506,165	456,150	(50,015)	-9.88%		
7	Health & Dental Insurance	344,343	408,338	443,087	476,707	33,620	7.59%		
8	Post Retirement Health Insurance	32,465	0	37,553	33,347	(4,206)	-11.20%		
9	Life Insurance	9,555	0	10,536	8,744	(1,792)	-17.01%		
10	Short & Long Term Disability & PFMLA	14,672	0	19,020	16,539	(2,481)	-11.47%		
11	State/Federal Unemployment Tax/Univ Hlth	16,584	26,724	19,748	16,539	(3,209)	-16.25%		
12	Worker's Compensation	2,044	0	2,350	2,112	(238)	-10.13%		
	Temporary Help	0	3,689	0	0	0	0.00%		
	Total Salaries & Fringe Benefits	3,158,880	2,741,970	3,557,281	3,646,564	88,782	2.50%		
<b>FACILITIES</b>									
18	Telephone	5,000	1,353	3,500	3,500	0	0.00%		
19	Rent	164,452	143,585	167,517	170,584	3,067	1.83%		
21	Utilities and Operating Expenses - Leaseholds	7,400	17,352	32,225	17,352	(14,873)	-46.15%		
	Total Facilities	176,852	162,290	203,242	191,436	(11,806)	-5.81%		
<b>BUSINESS EXPENSES</b>									
22	Travel - Mileage	10,001	7,718	10,000	7,798	(2,202)	-22.02%		
23	Travel - Miscellaneous Expenses & Parking	22,502	34,876	22,502	35,000	12,498	55.54%		
	Total Transportation & Travel	32,503	42,594	32,502	42,798	10,296	31.66%		

MASSACHUSETTS TEACHERS ASSOCIATION									
2025-2026									
LEGISLATION, POLICY AND POLITICAL ACTION COMBINED									
GRASSROOTS CAMPAIGNS, GOVERNMENT RELATIONS, CENTER FOR EDUCATION POLICY AND PRACTICE (CEPP)									
LN REF	ADOPTED BUDGET 2023-2024	2023-2024 ACTUAL	ADOPTED BUDGET 2024-2025	PROPOSED BUDGET 2025-2026	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25			
<b>PROGRAM EXPENSES</b>									
49	Local Grants / Political Action Leaders	12,600	35,000	35,000	0	0.00%			
50	Regional Team Organizing Expenses	0	129	15,000	(5,000)	-33.33%			
51	State Convention	5,000	936	0	5,000	0.00%			
52	Local, State and Federal Elections & Issues	275,000	497,602	275,000	395,000	43.64%			
53	VOTE - Political Contributions	14,999	10,150	14,999	14,999	0.00%			
54	Legislative Materials/Fees	25,000	13,655	25,000	25,000	0.00%			
55	State Budget / Issues Activities	225,000	77,581	225,000	225,000	0.00%			
56	Policy Development, Research & Monitoring	44,500	2,360	54,500	54,500	0.00%			
57	Higher Ed Research & Policy	30,000	0	30,000	30,000	0.00%			
	Total Program Expenses	942,477	2,216,735	674,499	120,000	17.79%			
<b>ADMINISTRATIVE EXPENSES</b>									
87	Office Supplies	1,000	1,202	1,000	1,000	0.00%			
88	Equipment Maintenance & Leasing	6,100	13,753	6,100	9,800	3,700	60.66%		
92	Software Packages	0	1,530	0	0	0.00%			
98	Postage & Delivery	1,000	95	1,000	1,000	0.00%			
100	Dues	2,000	411	2,000	2,000	0.00%			
101	Subscriptions	7,100	4,916	7,100	5,000	(2,100)	-29.58%		
	Total Administrative Expenses	17,200	21,907	17,200	18,800	1,600	9.30%		
	<b>TOTAL EXPENSES</b>	4,327,912	5,185,496	4,484,724	4,694,097	208,872	4.66%		
	<b>NET INCOME (LOSS)</b>	0	(741,638)	0	0	0	0.00%		
<b>DIVISION STAFF / SALARIES &amp; WAGES / HEADCOUNT = 13.75</b>									
	Director				\$182,475				
	Education Policy Specialist (3)				\$424,621				
	Coordinator (0.75)				\$64,669				
	Lobbyists (3)				\$520,076				
	Legislative Specialist				\$96,184				
	Legislative Clerk				\$119,979				
	Grassroots Campaigns Manager				\$177,170				
	Campaign Strategist				\$134,195				
	Political Community Organizers (2)				\$275,731				
	Part Time Senate District Coordinators (50)				\$450,000				

MASSACHUSETTS TEACHERS ASSOCIATION						
2025-2026						
LEGISLATION, POLICY AND POLITICAL ACTION BY DIVISION						
GRASSROOTS CAMPAIGNS, GOVERNMENT RELATIONS, CENTER FOR EDUCATION POLICY AND PRACTICE (CEPP)						
LN	REF	PROPOSED 2025-2026 BUDGET	GRASSROOTS CAMPAIGNS	GOVERNMENT RELATIONS	CEPP	
<b>REVENUE</b>						
<b>MEMBERSHIP DUES</b>						
1		4,694,097	1,484,651	2,062,221		1,147,225
		4,694,097	1,484,651	2,062,221		1,147,225
<b>PROGRAM REVENUE</b>						
2		0	0	0		0
3		0	0	0		0
4		0	0	0		0
		0	0	0		0
		0	0	0		0
		4,694,097	1,484,651	2,062,221		1,147,225
<b>TOTAL OPERATING REVENUE</b>						
<b>EXPENSES</b>						
<b>SALARIES &amp; FRINGE BENEFITS</b>						
1		1,714,267	587,097	520,075		607,095
2		280,831	0	216,162		64,669
3		450,000	450,000	0		0
4		4,500	(1)	4,501		0
5		186,528	79,270	56,397		50,861
6		456,150	134,231	168,331		153,588
7		476,707	137,467	189,876		149,364
8		33,347	9,527	11,909		11,911
9		8,744	2,575	3,225		2,944
10		16,839	4,957	6,214		5,668
11		16,539	13,108	1,716		1,715
12		2,112	621	781		710
		0	0	0		0
		3,646,564	1,418,852	1,179,187		1,048,525
<b>FACILITIES</b>						
18		3,500	0	3,500		0
19		170,584	0	170,584		0
21		17,352	0	17,352		0
		191,436	0	191,436		0
<b>BUSINESS EXPENSES</b>						
22		7,798	6,799	998		1
23		35,000	9,000	16,001		9,999
		42,798	15,799	16,999		10,000

MASSACHUSETTS TEACHERS ASSOCIATION						
2025-2026						
LEGISLATION, POLICY AND POLITICAL ACTION BY DIVISION						
GRASSROOTS CAMPAIGNS, GOVERNMENT RELATIONS, CENTER FOR EDUCATION POLICY AND PRACTICE (CEPP)						
LN	REF	PROPOSED 2025-2026 BUDGET	GRASSROOTS CAMPAIGNS	GOVERNMENT RELATIONS	CEPP	
<b>PROGRAM EXPENSES</b>						
49		35,000	35,000	0	0	0
50		10,000	10,000	0	0	0
51		5,000	5,000	0	0	0
52		395,000	0	395,000	0	0
53		14,999	0	14,999	0	0
54		25,000	0	25,000	0	0
55		225,000	0	225,000	0	0
56		54,500	0	54,500	0	54,500
57		30,000	0	0	0	30,000
		794,499	50,000	659,999	0	84,500
<b>ADMINISTRATIVE EXPENSES</b>						
87		1,000	0	1,000	0	0
88		9,800	0	9,800	0	0
92		0	0	0	0	0
98		1,000	0	1,000	0	0
100		2,000	0	0	0	2,000
101		5,000	0	2,800	0	2,200
		18,800	0	14,600	0	4,200
		4,694,097	1,484,651	2,062,221	0	1,147,225
		0	0	0	0	0
<b>DIVISION STAFF / SALARIES &amp; WAGES / HEADCOUNT = 13.75</b>						
		\$182,475				
		\$424,621				
		\$64,669				
		\$520,076				
		\$96,184				
		\$119,979				
		\$177,170				
		\$134,195				
		\$275,731				
		\$450,000				

MASSACHUSETTS TEACHERS ASSOCIATION 2025-2026									
<u>TRAINING AND PROFESSIONAL LEARNING</u>									
LN REF		ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25		
	<b>REVENUE</b>								
	<b>MEMBERSHIP DUES</b>								
1	Affiliation Dues	2,910,813	2,892,722	3,238,390	3,736,165	497,775	15.37%		
	<b>TOTAL MEMBERSHIP DUES</b>	2,910,813	2,892,722	3,238,390	3,736,165	497,775	15.37%		
	<b>PROGRAM REVENUE</b>								
2	NEA Uniserv Funding - Full time	21,000	0	0	0	0	#DIV/0!		
	NEA Grant Revenue	0	27,411	0	0	0	0.00%		
7	Conference/Workshop Revenue	21,000	6,439	21,000	5,000	(16,000)	-76.19%		
8	Summer Conference Revenue	24,150	37,644	24,150	15,000	(9,150)	-37.89%		
	Total Program Revenue	66,150	71,494	45,150	20,000	(25,150)	-55.70%		
	<b>TOTAL OPERATING REVENUE</b>	<u>2,976,963</u>	<u>2,964,216</u>	<u>3,283,540</u>	<u>3,756,165</u>	<u>472,625</u>	<u>14.39%</u>		
	<b>OPERATING EXPENSES</b>								
	<b>SALARIES &amp; FRINGE BENEFITS</b>								
1	Salaries	698,250	676,585	667,825	814,718	146,893	22.00%		
2	Wages	320,675	450,974	519,540	555,411	35,871	6.90%		
4	Overtime	50,000	114,829	50,000	100,000	50,000	100.00%		
5	FICA	81,006	95,195	92,012	111,803	19,791	21.51%		
6	Pension	314,553	60,786	319,171	312,870	(6,301)	-1.97%		
7	Health & Dental Insurance	269,936	271,654	317,275	379,793	62,518	19.70%		
8	Post Retirement Health Insurance	23,373	0	25,039	23,821	(1,218)	-4.86%		
9	Life Insurance	5,691	0	6,639	6,010	(629)	-9.47%		
10	Short and Long Term Disability & Paid Family Medical Leave	8,764	0	11,997	11,562	(435)	-3.63%		
11	State/Federal Unemployment Tax/Univ Hlth	3,933	8,582	3,744	3,430	(314)	-8.39%		
12	Worker's Compensation	1,222	0	1,482	1,447	(35)	-2.36%		
	Temporary Help	0	16,238	0	0	0	0.00%		
	Total Salaries & Fringe Benefits	1,777,403	1,694,843	2,014,724	2,320,865	306,141	15.20%		
	<b>BUSINESS EXPENSES</b>								
22	Travel - Mileage	6,000	7,763	6,000	8,000	2,000	33.33%		
23	Travel - Miscellaneous Expenses & Parking	10,000	17,777	10,000	18,000	8,000	80.00%		
	Total Business Expenses	16,000	25,540	16,000	26,000	10,000	62.50%		



MASSACHUSETTS TEACHERS ASSOCIATION 2025-2026									
COMMUNICATIONS DIVISION									
LN REF	ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25			
<b>REVENUE</b>									
<b>MEMBERSHIP DUES</b>									
1	2,409,287	2,940,859	2,409,287	2,734,855	325,568	13.51%			
TOTAL MEMBERSHIP DUES									
	2,409,287	2,940,859	2,409,287	2,734,855	325,568	13.51%			
<b>PROGRAM REVENUE</b>									
11	40,000	42,250	40,000	40,000	0	0.00%			
Newspaper Advertising									
	40,000	42,250	40,000	40,000	0	0.00%			
Total Program Revenue									
	40,000	42,250	40,000	40,000	0	0.00%			
TOTAL OPERATING REVENUE									
	2,449,287	2,983,109	2,449,287	2,774,855	325,568	13.29%			
<b>OPERATING EXPENSES</b>									
<b>SALARIES &amp; FRINGE BENEFITS</b>									
1	1,080,147	1,112,777	1,080,147	1,315,762	235,615	21.81%			
2	167,551	158,186	167,551	186,924	19,373	11.56%			
4	4,000	6,121	4,000	6,000	2,000	50.00%			
5	94,204	96,569	94,204	114,485	20,281	21.53%			
6	382,149	73,852	382,149	342,878	(39,271)	-10.28%			
7	190,881	306,017	190,881	337,698	146,817	76.92%			
8	23,372	0	23,372	23,820	448	1.92%			
9	6,969	0	6,969	6,590	(379)	-5.44%			
10	10,700	0	10,700	12,679	1,979	18.50%			
11	3,933	10,006	3,933	3,430	(503)	-12.79%			
12	1,484	0	1,484	1,589	105	7.08%			
Total Salaries & Fringe Benefits									
	1,965,390	1,768,093	1,965,390	2,351,855	386,465	19.66%			

MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026

COMMUNICATIONS DIVISION

LN REF		ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25
	<b>BUSINESS EXPENSES</b>						
22	Travel - Mileage	1,998	2,560	1,998	2,499	501	25.08%
23	Travel - Miscellaneous Expenses & Parking	11,999	17,992	11,999	18,001	6,002	50.02%
	Total Business Expenses	13,997	20,172	13,997	20,500	6,503	46.46%
	<b>PROGRAM EXPENSES</b>						
58	Media/Policy Priorities	120,000	54,857	100,000	100,000	0	0.00%
59	MTA TODAY	167,400	118,557	120,000	120,000	0	0.00%
60	Website/Digital Communications	165,000	157,522	165,000	165,000	0	0.00%
	Total Program Expenses	452,400	330,936	385,000	385,000	0	0.00%
	<b>ADMINISTRATIVE EXPENSES</b>						
87	Office Supplies	0	2,129	0	0	0	0.00%
88	Equipment Maintenance/Leasing	0	5,879	0	0	0	0.00%
92	Software Packages	10,000	8,339	10,000	9,000	(1,000)	-10.00%
100	Dues	1,500	0	1,500	1,500	0	0.00%
101	Subscriptions	6,000	7,346	6,000	7,000	1,000	16.67%
	Total Administrative Expenses	17,500	23,693	17,500	17,500	0	0.00%
	<b>TOTAL EXPENSES</b>	2,449,287	2,142,894	2,381,887	2,774,855	392,968	16.50%
	<b>NET INCOME (LOSS)</b>	0	840,215	67,400	0	(67,400)	
	<u><b>DIVISION STAFF / SALARIES &amp; WAGES / HEADCOUNT = 10</b></u>						
	Director				\$182,475		
	Communications Specialist (4)				\$617,557		
	Web Content Manager				\$178,254		
	Staff Assistant				\$100,697		
	Graphic Designer				\$86,226		
	Editor/Writer				\$156,222		
	Interactive Media Developer and Strategist				\$178,254		

MASSACHUSETTS TEACHERS ASSOCIATION 2025-2026										
<u>LEGAL SERVICES</u>										
LN REF		ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25			
	<u>REVENUE</u>									
1	Affiliation Dues	5,418,101	5,384,426	5,323,164	5,674,390	351,226	6.60%			
	<b>TOTAL MEMBERSHIP DUES</b>	5,418,101	5,384,426	5,323,164	5,674,390	351,226	6.60%			
	<u>PROGRAM REVENUE</u>									
5	NEA Legal Reimbursement	1,600,000	1,327,697	1,600,000	1,600,000	0	0.00%			
6	Insurance & Court/ Reimburse Atty Fees	20,000	6,688	20,000	10,000	(10,000)	-50.00%			
9	Workers Compensation Reimbursement	60,000	60,131	60,000	60,000	0	0.00%			
	Total Program Revenue	1,680,000	1,394,516	1,680,000	1,670,000	(10,000)	-0.60%			
	<b>TOTAL OPERATING REVENUE</b>	<b>7,098,101</b>	<b>6,778,942</b>	<b>7,003,164</b>	<b>7,344,390</b>	<b>341,226</b>	<b>4.87%</b>			
	<u>EXPENSES</u>									
	<u>SALARIES &amp; FRINGE BENEFITS</u>									
1	Salaries	2,057,180	1,917,954	2,143,803	2,350,639	206,836	9.65%			
2	Wages	511,367	553,279	544,231	611,199	66,968	12.31%			
3	Part - Time Staff	175,000	208,561	175,000	175,000	0	0.00%			
4	Overtime	6,000	10,991	6,000	11,000	5,000	83.33%			
5	FICA	197,271	187,547	198,009	222,891	24,882	12.57%			
6	Pension	762,775	147,393	708,946	674,536	(34,410)	-4.85%			
7	Health & Dental Insurance	411,046	581,213	464,160	538,418	74,258	16.00%			
8	Post Retirement Health Insurance	44,150	0	44,514	42,878	(1,636)	-3.68%			
9	Life Insurance	14,344	0	15,022	12,985	(2,037)	-13.56%			
10	Short and Long Term Disability & Paid Family Medical	21,827	0	27,025	24,985	(2,040)	-7.55%			
11	State/Federal Unemployment Tax/Univ Hlth	13,081	18,726	12,070	10,739	(1,331)	-11.03%			
12	Workers Compensation	2,959	0	3,284	3,118	(166)	-5.05%			
	Temporary Help	0	56,024	0	0	0	0.00%			
	Total Salaries & Fringe Benefits	4,217,000	3,681,688	4,342,064	4,678,388	336,324	7.75%			
	<u>BUSINESS EXPENSES</u>									
22	Travel - Mileage	10,001	10,417	10,000	10,001	1	0.01%			
23	Travel - Miscellaneous Expenses & Parking	25,000	64,349	25,000	64,001	39,001	156.00%			
	Total Transportation & Travel	35,001	74,766	35,000	74,002	39,002	111.43%			

MASSACHUSETTS TEACHERS ASSOCIATION									
2025-2026									
LEGAL SERVICES									
LN	REF	ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25		
<b>PROGRAM EXPENSES</b>									
61		160,000	72,242	140,000	120,000	(20,000)	-14.29%		
62		2,260,000	2,491,852	2,060,000	2,060,000	0	0.00%		
63		300,000	329,104	300,000	300,000	0	0.00%		
		2,720,000	2,893,198	2,500,000	2,480,000	(20,000)	-0.80%		
<b>ADMINISTRATIVE EXPENSES</b>									
87		0	4,759	0	0	0	0.00%		
92		0	0	0	0	0	100.00%		
93		18,000	17,214	18,000	18,000	0	0.00%		
100		8,000	3,098	8,000	8,000	0	0.00%		
101		100,100	116,340	100,100	86,000	(14,100)	-14.09%		
		126,100	141,411	126,100	112,000	(14,100)	-11.18%		
		7,098,101	6,791,063	7,003,164	7,344,390	341,226	4.87%		
		0	(12,121)	0	0	0			
<b><u>DIVISION STAFF / SALARIES &amp; WAGES / HEADCOUNT = 18</u></b>									
					\$218,273				
					\$205,071				
					\$1,918,297				
					\$117,861				
					\$214,901				
					\$196,945				
					\$78,945				
					\$175,000				

MASSACHUSETTS TEACHERS ASSOCIATION 2025-2026									
GOVERNANCE AND ADMINISTRATION									
LN REF	ADOPTED 2023-2024 BUDGET	2024-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25			
<b>REVENUE</b>									
<b>MEMBERSHIP DUES</b>									
1	7,010,948	6,967,373	7,686,849	5,473,962	(2,212,887)	-28.79%			
2	0	0	0	0	0	0.00%			
<b>TOTAL MEMBERSHIP DUES</b>	<b>7,010,948</b>	<b>6,967,373</b>	<b>7,686,849</b>	<b>5,473,962</b>	<b>(2,212,887)</b>	<b>-28.79%</b>			
<b>PROGRAM REVENUE</b>									
10	20,000	20,481	20,000	21,000	1,000	5.00%			
13	600	0	600	0	(600)	-100.00%			
<b>Total Program Revenue</b>	<b>20,600</b>	<b>20,481</b>	<b>20,600</b>	<b>21,000</b>	<b>400</b>	<b>1.94%</b>			
<b>TOTAL OPERATING REVENUE</b>	<b>7,031,548</b>	<b>6,987,854</b>	<b>7,707,449</b>	<b>5,494,962</b>	<b>(2,212,487)</b>	<b>-28.71%</b>			
<b>EXPENSES</b>									
<b>SALARIES &amp; FRINGE BENEFITS</b>									
1	933,441	1,001,145	971,148	987,892	16,744	1.72%			
2	229,414	245,037	243,221	253,342	10,121	4.16%			
4	20,000	43,820	20,000	44,000	24,000	120.00%			
5	67,718	76,424	70,097	75,190	5,093	7.27%			
6	239,085	75,844	226,284	189,387	(36,897)	-16.31%			
7	194,462	275,452	203,131	225,941	22,810	11.23%			
8	12,980	0	13,905	11,907	(1,998)	-14.37%			
9	6,497	0	6,789	5,444	(1,345)	-19.81%			
10	9,333	0	11,606	10,333	(1,273)	-10.97%			
11	3,058	6,946	2,910	2,399	(511)	-17.56%			
12	1,087	0	1,198	1,038	(160)	-13.36%			
<b>Total Salaries &amp; Fringe Benefits</b>	<b>1,717,075</b>	<b>1,724,668</b>	<b>1,770,289</b>	<b>1,806,873</b>	<b>36,584</b>	<b>2.07%</b>			
<b>CONTRACTED SERVICES &amp; PROF FEES</b>									
	0	0	0	0	0	0.00%			
13	25,000	19,481	25,000	25,000	0	0.00%			
17	125,000	59,915	100,000	100,000	0	0.00%			
<b>Total Contracted Svcs &amp; Prof. Fees</b>	<b>150,000</b>	<b>79,396</b>	<b>125,000</b>	<b>125,000</b>	<b>0</b>	<b>0.00%</b>			
<b>FACILITIES</b>									
19	1,063,300	1,002,875	1,093,107	922,918	(170,189)	-15.57%			
20	2,688	4,333	8,175	4,333	(3,842)	-47.00%			
21	171,000	255,950	314,125	227,747	(86,378)	-27.50%			
<b>Total Facilities</b>	<b>1,236,988</b>	<b>1,263,158</b>	<b>1,415,407</b>	<b>1,154,998</b>	<b>(260,409)</b>	<b>-18.40%</b>			
<b>BUSINESS EXPENSES</b>									
22	4,004	5,344	4,000	5,004	1,004	25.09%			
23	29,999	42,912	30,000	43,001	13,001	43.34%			
24	52,000	42,184	0	45,000	45,000	100.00%			
25	22,000	15,540	0	20,000	20,000	100.00%			
<b>Total Business Expenses</b>	<b>108,003</b>	<b>105,980</b>	<b>34,000</b>	<b>113,005</b>	<b>79,005</b>	<b>232.37%</b>			

MASSACHUSETTS TEACHERS ASSOCIATION 2025-2026									
GOVERNANCE AND ADMINISTRATION									
LN REF		ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25		
	PROGRAM EXPENSES								
64	Annual Meeting	480,000	422,274	528,000	465,000	(63,000)	-11.93%		
65	Human Civil Rights Dinner & Awards	22,000	19,787	24,200	24,200	0	0.00%		
66	Board Meetings	176,000	166,683	193,600	212,960	19,360	10.00%		
67	Other Board Activities	40,000	42,013	44,000	48,400	4,400	10.00%		
68	Executive Committee Meetings	27,500	23,544	30,250	31,750	1,500	4.96%		
69	Other Executive Committee Activities	11,000	14,748	12,100	15,000	2,900	23.97%		
70	Local Presidents Meetings	36,000	43,881	39,600	49,000	9,400	23.74%		
71	President's Special Projects	8,000	7,987	8,800	8,800	0	0.00%		
72	National Conferences	27,500	27,403	30,250	30,250	0	0.00%		
73	Special Interest Conferences	27,500	13,916	30,250	30,250	0	0.00%		
74	NEA Delegate Stipends	286,500	284,675	286,500	286,500	0	0.00%		
75	NEA Convention Expenses	82,500	18,766	90,750	90,750	0	0.00%		
76	MTA / NEA Elections	55,366	54,134	58,134	58,134	0	0.00%		
77	Committees	150,000	69,718	150,000	150,000	0	0.00%		
78	Projects, Coalitions & Donations	70,000	97,854	60,000	60,000	0	0.00%		
79	Discretionary Donations	70,000	62,700	70,000	70,000	0	0.00%		
80	Massachusetts Child Donation	20,000	20,000	20,000	20,000	0	0.00%		
81	AFL/CIO Membership Dues	250,000	234,932	250,000	300,000	50,000	20.00%		
	Total Program Expenses	1,839,866	1,625,015	1,926,434	1,950,994	24,560	1.27%		
	ADMINISTRATIVE EXPENSES								
92	Software Packages	0	21,515	21,500	22,000	500	2.33%		
100	Dues	20,000	959	55,000	55,500	500	0.91%		
101	Subscriptions	1,500	585	1,500	600	(900)	-60.00%		
	Total Administrative Expenses	21,500	23,059	78,000	78,100	100	0.13%		
	Total Expenses Before Contingency	5,073,432	4,821,276	5,349,130	5,228,970	(120,160)	-2.25%		
104	Contingency	809,686	0	334,047	265,992	(68,055)	-20.37%		
107	Increased Campaign Capacity	1,184,430	0	2,063,872	0	(2,063,872)	-100.00%		
	TOTAL EXPENSES	7,067,548	4,821,276	7,747,049	5,494,962	(2,252,087)	-29.07%		
	NET INCOME (LOSS)	(36,000)	2,166,578	(39,600)	0	39,600			
	<b>DIVISION STAFF / SALARIES &amp; WAGES / HEADCOUNT = 7.0</b>								
	President				\$268,728				
	Vice President				\$223,940				
	Executive Director-Treasurer				\$230,000				
	Director				\$175,049				
	Executive Assistant to Executive Director-Treasurer				\$90,177				
	Governance Specialist				\$141,936				
	Governance Assistant				\$109,705				

MASSACHUSETTS TEACHERS ASSOCIATION										
2025-2026										
<u>HUMAN RESOURCES</u>										
LN	REF	ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25			
		<u>REVENUE</u>								
		<u>MEMBERSHIP DUES</u>								
1		840,702	835,477	1,118,966	1,305,639	186,673	16.68%			
		840,702	835,477	1,118,966	1,305,639	186,673	16.68%			
		840,702	835,477	1,118,966	1,305,639	186,673	16.68%			
		<u>EXPENSES</u>								
		<u>SALARIES &amp; FRINGE BENEFITS</u>								
1		335,207	115,341	458,493	616,753	158,260	34.52%			
2		0	0	0	0	0	0.00%			
5		25,644	8,691	33,847	45,464	11,617	34.32%			
6		103,687	20,042	123,293	141,011	17,718	14.37%			
7		76,871	(1,167,514)	135,778	53,950	(81,828)	-60.27%			
8		10,388	815,313	11,128	9,528	(1,600)	-14.38%			
9		1,872	108,979	2,558	2,704	146	5.71%			
10		2,883	133,039	4,632	5,205	573	12.37%			
11		1,748	50,787	1,664	1,372	(292)	-17.55%			
12		402	36,319	573	652	79	13.79%			
		568,702	120,997	771,966	876,639	104,673	13.56%			
		<u>CONTRACTED SERVICES &amp; PROF FEES</u>								
13		60,000	513,718	60,000	117,000	57,000	95.00%			
16		0	0	50,000	50,000	0	0.00%			
		60,000	513,718	110,000	167,000	57,000	51.82%			
		<u>BUSINESS EXPENSES</u>								
22		500	0	500	500	0	0.00%			
23		1,000	0	1,000	1,000	0	0.00%			
		1,500	0	1,500	1,500	0	0.00%			

MASSACHUSETTS TEACHERS ASSOCIATION									
2025-2026									
HUMAN RESOURCES									
LN REF		ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25		
	<b>PROGRAM EXPENSES</b>								
82	Internal Employee / Management Meetings	28,000	20,996	28,000	28,000	0	0.00%		
83	All - Staff Meetings	25,000	35,364	25,000	40,000	15,000	60.00%		
84	Training & Tuition Reimbursement- Staff	100,000	82,787	100,000	110,000	10,000	10.00%		
85	Employee Engagement and Recognition	20,000	21,350	20,000	35,000	15,000	75.00%		
86	Recruitment	<u>45,000</u>	<u>43,936</u>	<u>60,000</u>	<u>45,000</u>	<u>(15,000)</u>	<u>-25.00%</u>		
	Total Program Expenses	218,000	204,433	233,000	258,000	25,000	10.73%		
	<b>ADMINISTRATIVE EXPENSES</b>								
100	Dues	1,000	0	1,000	1,000	0	0.00%		
101	Subscriptions	<u>1,500</u>	<u>0</u>	<u>1,500</u>	<u>1,500</u>	<u>0</u>	<u>0.00%</u>		
	Total Administrative Expenses	2,500	0	2,500	2,500	0	0.00%		
	<b>TOTAL EXPENSES</b>	840,702	839,148	1,118,966	1,305,639	186,673	16.68%		
	<b>NET INCOME (LOSS)</b>	0	(3,671)	0	0	0			
	<b><u>DIVISION STAFF / SALARIES &amp; WAGES / HEADCOUNT = 4</u></b>								
	Director				\$154,500				
	Employee Relations/Diversity and Inclusion Specialist				\$203,803				
	HR Generalist				\$118,450				
	Employee Benefits Manager				\$140,000				

MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026

FINANCE & ACCOUNTING									
LN	REF	ADOPTED 2023-2024 BUDGET	ADOPTED 2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25	
<b>REVENUE</b>									
<b>MEMBERSHIP DUES</b>									
1		3,359,497	3,338,617	3,671,742	3,616,357	(55,385)	(55,385)	-1.51%	
		3,359,497	3,338,617	3,671,742	3,616,357	(55,385)	(55,385)	-1.51%	
<b>TOTAL MEMBERSHIP DUES</b>									
<b>OTHER INCOME</b>									
14		1,274,641	1,819,033	1,442,986	1,820,000	377,014	377,014	26.13%	
		0	729,747	0	0	0	0	0.00%	
15		171,000	144,906	163,000	158,800	(4,200)	(4,200)	-2.58%	
16		200,000	244,740	200,000	240,000	40,000	40,000	20.00%	
		1,645,641	2,938,426	1,805,986	2,218,800	412,814	412,814	22.86%	
<b>TOTAL OPERATING REVENUE</b>									
		5,005,138	6,277,043	5,477,728	5,835,157	357,429	357,429	6.53%	
<b>EXPENSES</b>									
<b>SALARIES &amp; FRINGE BENEFITS</b>									
1		438,454	581,446	639,779	793,973	154,194	154,194	24.10%	
2		799,074	735,976	883,257	923,058	39,801	39,801	4.51%	
R3		0	0	0	0	0	0	0.00%	
4		70,000	130,619	70,000	89,000	19,000	19,000	27.14%	
5		98,798	107,407	118,793	136,310	17,517	17,517	14.75%	
6		379,560	73,345	408,616	391,699	(16,917)	(16,917)	-4.14%	
7		316,988	313,049	440,237	470,562	30,325	30,325	6.89%	
8		27,331	0	6,891	33,343	26,452	26,452	383.86%	
9		6,918	0	8,508	7,533	(975)	(975)	-11.46%	
10		10,619	0	15,382	14,473	(909)	(909)	-5.91%	
11		5,681	10,475	5,824	4,802	(1,022)	(1,022)	-17.55%	
12		1,503	0	1,891	1,797	(94)	(94)	-4.97%	
		2,154,926	1,952,317	2,599,178	2,866,549	267,371	267,371	10.29%	
<b>CONTRACTED SERVICES &amp; PROF FEES</b>									
13		5,000	598	5,000	30,000	25,000	25,000	500.00%	
14		60,000	91,300	90,000	90,000	0	0	0.00%	
15		204,664	223,753	230,000	209,208	(20,792)	(20,792)	-9.04%	
16		70,000	75,447	70,000	70,000	0	0	0.00%	
		339,664	391,557	395,000	399,208	4,208	4,208	1.07%	
<b>BUSINESS EXPENSES</b>									
22		748	1,395	751	1,400	649	649	86.42%	
23		5,000	4,532	4,999	4,500	(499)	(499)	-9.98%	
		5,748	5,927	5,750	5,900	150	150	2.61%	



MASSACHUSETTS TEACHERS ASSOCIATION 2025-2026									
ITS (INFORMATION TECHNOLOGY SERVICES)									
LN REF		ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25		
	<u>REVENUE</u>								
	MEMBERSHIP DUES								
1	Affiliation Dues	<u>1,056,332</u>	<u>1,049,767</u>	<u>1,208,963</u>	<u>1,237,553</u>	<u>28,590</u>	<u>2.36%</u>		
	TOTAL MEMBERSHIP DUES	<u>1,056,332</u>	<u>1,049,767</u>	<u>1,208,963</u>	<u>1,237,553</u>	<u>28,590</u>	<u>2.36%</u>		
	TOTAL OPERATING REVENUE	<u>1,056,332</u>	<u>1,049,767</u>	<u>1,208,963</u>	<u>1,237,553</u>	<u>28,590</u>	<u>2.36%</u>		
	<u>EXPENSES</u>								
	SALARIES & FRINGE BENEFITS								
1	Salaries	169,499	177,160	177,160	182,475	5,315	3.00%		
2	Wages	138,204	129,706	186,620	205,894	19,274	10.33%		
5	FICA	22,964	22,496	26,777	29,314	2,537	9.47%		
6	Pension	94,329	18,232	97,367	88,795	(8,572)	-8.80%		
7	Health & Dental Insurance	54,506	71,580	96,277	34,407	(61,870)	-64.26%		
8	Post Retirement Health Insurance	6,493	0	6,955	7,146	191	2.75%		
9	Life Insurance	1,720	0	2,036	1,705	(331)	-16.26%		
10	Short and Long Term Disability & Paid Family Medical Leave	2,639	0	3,671	3,277	(394)	-10.73%		
11	State/Federal Unemployment Tax/Univ Hlth	1,311	2,327	1,248	1,029	(219)	-17.55%		
12	Workers Compensation	<u>367</u>	<u>0</u>	<u>452</u>	<u>411</u>	<u>(41)</u>	<u>-9.07%</u>		
	Total Salaries & Fringe Benefits	<u>492,032</u>	<u>421,501</u>	<u>598,563</u>	<u>554,453</u>	<u>(44,110)</u>	<u>-7.37%</u>		
	CONTRACTED SERVICES & PROF. FEES								
13	Consultants	<u>35,000</u>	<u>30,131</u>	<u>35,000</u>	<u>35,000</u>	<u>0</u>	<u>0.00%</u>		
	Total Contracted Services & Prof. Fees	<u>35,000</u>	<u>30,131</u>	<u>35,000</u>	<u>35,000</u>	<u>0</u>	<u>0.00%</u>		
	FACILITIES & TELEPHONE								
18	Telephone	<u>162,000</u>	<u>185,329</u>	<u>121,000</u>	<u>121,000</u>	<u>0</u>	<u>0.00%</u>		
	Total Facilities & Telephone	<u>162,000</u>	<u>185,329</u>	<u>121,000</u>	<u>121,000</u>	<u>0</u>	<u>0.00%</u>		

MASSACHUSETTS TEACHERS ASSOCIATION  
2025-2026

ITS (INFORMATION TECHNOLOGY SERVICES)

LN REF		ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25
	<b>BUSINESS EXPENSES</b>						
22	Travel - Mileage	1,500	1,541	1,500	1,500	0	0.00%
23	Travel - Miscellaneous Expenses & Parking	3,000	5,231	3,000	4,000	1,000	33.33%
	Total Business Expenses	4,500	6,772	4,500	5,500	1,000	22.22%
	<b>ADMINISTRATIVE EXPENSES</b>						
88	Equipment Maintenance / Leasing	112,900	177,445	150,000	178,000	28,000	18.67%
89	Computer Leasing	40,000	11,363	40,000	40,000	0	0.00%
90	Internet Connectivity	28,000	33,566	28,000	33,600	5,600	20.00%
92	Software Packages	180,000	268,335	230,000	270,000	40,000	17.39%
101	Subscriptions	1,900	0	1,900	0	(1,900)	-100.00%
	Total Administrative Expenses	362,800	490,809	449,900	521,600	71,700	15.94%
	<b>TOTAL EXPENSES</b>	1,056,332	1,134,542	1,208,963	1,237,553	28,590	2.36%
	<b>NET INCOME (LOSS)</b>	0	(84,775)	0	0	0	
	<b><u>DIVISION STAFF / SALARIES &amp; WAGES / HEADCOUNT = 3</u></b>						
	Director				\$182,475		
	IT Systems Support Specialist & Division Coordinator				\$100,697		
	IT Trainer				\$105,197		

MASSACHUSETTS TEACHERS ASSOCIATION										
2025-2026										
<u>PRINTING &amp; MAILING</u>										
LN	REF	ADOPTED 2023-2024 BUDGET	2023-2024 ACTUAL	ADOPTED 2024-2025 BUDGET	PROPOSED 2025-2026 BUDGET	PROPOSED INCR/(DECR) FROM FY 25	PROPOSED % INCR/(DECR) FROM FY 25			
		<u>REVENUE</u>								
		<u>MEMBERSHIP DUES</u>								
1		751,046	746,378	817,692	796,860	(20,832)	-2.55%			
		751,046	746,378	817,692	796,860	(20,832)	-2.55%			
		<u>PROGRAM REVENUE</u>								
12		50,000	93,550	50,000	94,000	44,000	88.00%			
		50,000	93,550	50,000	94,000	44,000	88.00%			
		801,046	839,928	867,692	890,860	23,168	2.67%			
		<u>EXPENSES</u>								
		<u>SALARIES &amp; FRINGE BENEFITS</u>								
2		325,452	400,023	373,205	342,416	(30,789)	-8.25%			
4		5,000	4,428	5,000	4,000	(1,000)	-20.00%			
5		25,279	31,378	28,934	26,502	(2,432)	-8.41%			
6		98,968	19,119	95,142	73,852	(21,290)	-22.38%			
7		83,330	82,220	85,476	100,418	14,942	17.48%			
8		10,388	0	11,128	9,528	(1,600)	-14.38%			
9		1,820	0	2,088	1,503	(585)	-28.02%			
10		2,785	0	3,721	2,878	(843)	-22.66%			
11		1,748	2,960	1,664	1,372	(292)	-17.55%			
12		384	0	442	341	(101)	-22.85%			
		555,154	540,128	606,800	562,810	(43,990)	-7.25%			
		<u>Total Salaries &amp; Fringe Benefits</u>								

**MASSACHUSETTS TEACHERS ASSOCIATION**  
2025-2026

**PRINTING & MAILING**

<u>LN</u>	<u>REF</u>	<u>ADOPTED</u> 2023-2024 <u>BUDGET</u>	<u>2023-2024</u> <u>ACTUAL</u>	<u>ADOPTED</u> 2024-2025 <u>BUDGET</u>	<u>PROPOSED</u> 2025-2026 <u>BUDGET</u>	<u>PROPOSED</u> INCR/(DECR) <u>FROM FY 25</u>	<u>PROPOSED %</u> INCR/(DECR) <u>FROM FY 25</u>
<b>BUSINESS EXPENSES</b>							
22		250	658	250	650	400	160.00%
23		<u>1,500</u>	<u>1,144</u>	<u>1,500</u>	<u>14,400</u>	<u>12,900</u>	<u>860.00%</u>
		1,750	1,802	1,750	15,050	13,300	760.00%
<b>ADMINISTRATIVE EXPENSES</b>							
87		64,000	48,720	64,000	50,000	(14,000)	-21.88%
88		27,400	49,410	27,400	49,000	21,600	78.83%
91		4,500	7,077	4,500	4,500	0	0.00%
94		10,700	11,484	10,700	11,500	800	7.48%
98		66,000	72,863	66,000	66,000	0	0.00%
99		21,542	67,169	21,542	67,000	45,458	211.02%
102		<u>50,000</u>	<u>90,784</u>	<u>65,000</u>	<u>65,000</u>	<u>0</u>	<u>0.00%</u>
		244,142	344,988	259,142	313,000	53,858	20.78%
<b>TOTAL EXPENSES</b>							
		801,046	886,918	867,692	890,860	23,168	2.67%
<b>NET INCOME (LOSS)</b>							
		0	(46,990)	0	0	0	
<b><u>DIVISION STAFF / SALARIES &amp; WAGES / HEADCOUNT = 4</u></b>							
					\$109,705		
					\$138,509		
					\$74,803		



# SECTION 8





TEN YEAR COMPARISON OF STAFF										
FISCAL YEARS 2016-2017 through 2025-2026										
	2025-2026	2024-2025	2023-2024	2022-2023	2021-2022	2020-2021	2019-2020	2018-2019	2017-2018	2016-2017
<b>FIELD &amp; ORGANIZING</b>										
Director	1	1	1	1	1	1	1	1	1	1
Regional Manager	5	5	3	3	3	2	2	2	2	2
New Member Organizer	0	0	0	0	1	1	1	0	0	0
Data Strategist	1	1	1	1	1	1	0	0	0	0
Data Specialist	1	1	1	1	1	1	1	1	1	1
Health & Safety Organizer	1	1	1	1	0	0	0	0	0	0
Coordinator	1	1	1	1	1	1	1	1	1	1
	10	10	8	9	8	6	6	6	5	5
<b>BCST (BARGAINING &amp; CAMPAIGN STRATEGIST) TEAM</b>										
BCST	3	3	3	3	3	0	0	0	0	0
Coordinator	1	0.5	0	0	0	0	0	0	0	0
	4	3.5	3	3	3	0	0	0	0	0
<b>CENTRAL REGION</b>										
Regional Team Leader/ Field Rep-organizer	1	1	0	0	0	0	0	0	0	0
UniServ/Field Rep-organizer	8	8	8	8	8	7	7	7	7	7
Coordinator	2	1	1	1	1	1	1	1	1	1
Secretary	0	0	1	1	1	1	1	1.2	1.2	1.2
	11	11	10	10	10	9	9	9.2	9.2	9.2
<b>METRO REGION</b>										
Regional Team Leader/ Field Rep-organizer	1	1	0	0	0	0	0	0	0	0
UniServ/Field Rep-organizer	8	8	8	8	8	7	7	7	7	7
Coordinator	2	1	1	1	1	1	1	1	1	1
Secretary	0	0	1	1	1	1	1	1.2	1.2	1.2
	11	11	10	10	10	9	9	9.2	9.2	9.2
<b>NORTHEAST REGION (NERO)</b>										
Regional Team Leader/ Field Rep-organizer	1	1	0	0	0	0	0	0	0	0
UniServ/Field Rep-organizer	8	8	8	8	8	7	7	7	7	7
Coordinator	2	2	2	2	2	2	2	2.2	2.2	2.2
	11	11	10	10	10	9	9	9.2	9.2	9.2
<b>SOUTHEAST REGION (SERO)</b>										
Regional Team Leader/ Field Rep-organizer	1	1	0	0	0	0	0	0	0	0
UniServ/Field Rep-organizer	8	8	8	8	8	7	7	7	7	7
Coordinator	2	2	2	2	2	2	2	2	2	2
Secretary	0	0	0	0	0	0	0	2.2	2.2	2.2
	11	11	10	10	10	9	9	9.2	9.2	9.2

TEN YEAR COMPARISON OF STAFF FISCAL YEARS 2016-2017 through 2025-2026											
	2025-2026	2024-2025	2023-2024	2022-2023	2021-2022	2020-2021	2019-2020	2018-2019	2017-2018	2016-2017	
<b>WESTERN/BERKSHIRE REGION (WEST)</b>											
Regional Team Leader/ Field Rep-organizer	1	1	0	0	0	0	0	0	0	0	
UniServ/Field Rep-organizer	8	8	8	8	8	7	7	7	7	7	
Coordinator	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.7	3.2	3.2	
	11.5	11.5	10.5	10.5	10.5	9.5	9.5	9.7	10.2	10.2	
<b>HIGHER EDUCATION</b>											
Regional Team Leader/ Field Rep-organizer	1	1	0	0	0	0	0	0	0	0	
Manager	0	0	1	1	1	1	1	1	1	1	
UniServ/Field Rep-organizer	9	9	8	8	8	7	7	7.25	7	7	
Regional Organizer	0	0	1	1	1	0	0	0	0	0	
New Member / SEAM Organizer	1	1	1	0	0	0	0	0	0	0	
Coordinator	1	1	1	1	1	1	1	1	1	1	
	12	12	12	11	11	9	9	9.25	9	9	
<b>STATEWIDE ORGANIZING TEAM</b>											
Regional Team Leader/ Regional Organizer	2	0	0	0	0	0	0	0	0	0	
Regional Organizer	10	12	5	5	5	5	5	5	5	5	
ESP Organizer - UniServ Consultant*	1	1	1	1	1	1	1	1	1	1	
Retired Member Organizer	1	1	1	1	1	1	1	1	1	1	
	14	14	7	7	7	2	2	2	2	2	

TEN YEAR COMPARISON OF STAFF										
FISCAL YEARS 2016-2017 through 2025-2026										
	2025-2026	2024-2025	2023-2024	2022-2023	2021-2022	2020-2021	2019-2020	2018-2019	2017-2018	2016-2017
<b>LEGISLATIVE POLICY &amp; POLITICAL ACTION</b>										
<b>GOVERNMENT RELATIONS</b>										
Director	0	0	1	1	1	1	1	1	1	1
Education Research & Policy Specialist	3	3	3	3	3	3	3	4	4	4
Legislative Specialist	1	1	1	1	1	1	1	1	1	1
Legislative Clerk	1	1	1	1	1	1	1	1	1	1
<b>CEPP &amp; RESEARCH</b>	5	5	6	6	6	6	6	7	7	7
<b>Director</b>	1	1	1	1	1	1	1	1	1	1
Education Research and Policy Specialist	2	2	2	2	2	2	2	2	2	2
Education Policy Specialist	1	1	1	1	1	1	1	1	1	1
Coordinator	0.75	0.75	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
PD Part-Timer	0	0	0	0	0	0	0	0	0	0.1
	4.75	4.75	4.5	4.5	4.5	4.5	4.5	4.5	5.1	5.1
<b>GRASSROOTS CAMPAIGNS</b>										
Director	1	1	1	1	1	1	1	1	1	1
Grassroots Campaign Deputy	0	0	0	0	0	0	0	0	0	0
ESP Organizer - UniServ Consultant	0	0	0	0	0	0	0	0	0	0
Retiree/Student Organizer	0	0	0	0	0	0	0	0	0	0
Coordinator	0	0	1	1	1	1	1	1	1	1
Political Community Organizer	3	3	3	3	3	3	3	3	3	3
	4	4	2	2	2	2	2	2	2	2
<b>COMMUNICATIONS</b>										
Director	1	1	1	1	1	1	1	1	1	1
Editor/Writer	1	1	1	1	1	1	1	1	1	1
Web Content Manager	1	1	1	1	1	1	1	1	1	1
Communications Specialist	4	3	3	3	3	3	3	3	3	3
Media Developer	1	1	1	1	1	1	1	1	1	1
Graphic Designer	1	1	1	1	1	1	1	1	1	1
Staff Assistant	1	1	1	1	1	1	1	1	1	1
	10	9	9	9	9	9	9	9	9	9

TEN YEAR COMPARISON OF STAFF FISCAL YEARS 2016-2017 through 2025-2026										
	2025-2026	2024-2025	2023-2024	2022-2023	2021-2022	2020-2021	2019-2020	2018-2019	2017-2018	2016-2017
<b>LEGAL SERVICES</b>										
General Counsel	1	1	1	1	1	1	1	1	1	1
Deputy General Counsel	1	1	1	1	1	1	1	1	1	1
Staff Counsel	10	9	9	9	9	9	9	9	9	9
Legal Administration Associate	0	0	0.5	0.5	0	0	0	0	0	0
Paralegal	2	2	2	2	2	2	2	2	2	2
Administrative Assistant	1	1	1	1	1	1	1	1	1	1
Coordinator	1	0	0	1	1	1	1	1	1	1
Legal Billing Specialist/Legal Secretary	1	1	0	1	1	1	1	1	1	1
Legal Secretary	1	1	2	2	2	2	2	2	2	2
	18	16	16.5	16.5	16.5	16	16	16	16	16
<b>TRAINING &amp; PROFESSIONAL LEARNING</b>										
Director	1	1	1	1	1	1	1	1	1	1
Program and Leadership Development Strategist	4	3	2	2	2	2	2	2	2	2
Events Producer	1	1	1	1	1	1	1	1	1	1
Conference Administrator's Assistant	0	0	0	0	0	0	0	0	0	0
Events Specialists	4	4	3	0	0	0	0	0	0	0
Coordinator	0	0	0.5	3.5	3.5	3.5	3.5	2	2	2
CEPP Part-timers (8 = 1 FTE)	0	0	0	0	0	0	1	1	1	1
Assistant Supervisor/Data Analyst	0	0	0	0	0	0	0	1	1	1
	10	9	8.5	7.5	7.5	8.5	8.5	9	9	9
<b>GOVERNANCE &amp; ADMINISTRATION</b>										
Executive Director-Treasurer	1	1	1	1	1	1	1	1	1	1
Director of Governance	1	1	1	1	1	1	1	1	1	1
Executive Assistant to Executive Director	1	1	1	1	1	1	1	1	1	1
Governance Specialist	1	1	1	1	1	1	1	1	1	1
Governance Assistant	1	1	1	1	1	1	1	1	1	1
	5	5	5	5	5	5	5	5	5	5

TEN YEAR COMPARISON OF STAFF										
FISCAL YEARS 2016-2017 through 2025-2026										
	2025-2026	2024-2025	2023-2024	2022-2023	2021-2022	2020-2021	2019-2020	2018-2019	2017-2018	2016-2017
<b>HUMAN RESOURCES</b>										
Human Resources Director	1	1	1	1	1	1	1	1	1	1
Human Resources Associate/Generalist	1	1	0.5	0.5	0.5	0	0	0	0	0
Benefits Manager	1	1	1	1	1	1	1	1	1	1
Employee Relations/Diversity & Inclusion Specialist	1	1	1	1	1	1	1	1	1	1
	4	4	3.5	3.5	3.5	3	3	3	3	3
<b>FINANCE AND ACCOUNTING</b>										
Chief Financial Officer	1	1	1	1	1	1	1	1	1	1
Controller	1	1	1	1	1	1	1	1	1	1
Assistant Controller	1	1	0	0	0	0	0	0	0	0
Payroll Manager	1	1	1	1	1	1	1	1	1	1
Accounting Manager - Membership	1	1	1	1	1	1	1	1	1	1
Financial Reporting Accountant	1	1	1	1	1	1	1	1	1	1
Budget Specialist	0	0	0	0.5	0	0	0	0.5	0.5	0.5
Sr. Accounting Clerk (General Ledger)	1	1	1	1	1	1	1	1	1	1
Sr. Accounting Clerk (Payroll)	1	1	1	1	1	1	1	1	1	1
Sr. Accounting Clerk (Payables)	1	1	1	1	1	1	1	1	1	1
Sr. Accounting Clerk (Receivables)	1	1	1	1	1	1	1	1	1	1
Accts. Rec./Membership Clerk	3	3	3	3	3.5	3.5	3.5	3	3	3
Administrative Accountant	0	0	1	1	1	1	1	1	1	1
Business Analyst	1	1	0	0	0	0	0	0	0	0
Coordinator	0.25	0.25	0	0	0	0	0	0	0	0
	14.25	13.25	12	11.5	11.5	11.5	11.5	11.5	11.5	11.5
<b>INFORMATION TECHNOLOGY SERVICES</b>										
Director	1	1	1	1	1	1	1	1	1	1
Senior Applications Developer	0	0	0	0	0	0	0	0	0	0
Systems Support Specialist	1	1	1.5	1.2	1.2	1.2	1.2	1.2	2.2	2.2
IT Trainer	1	1	0	0	0	0	0	0	0	0
	3	3	2.5	2.2	2.2	2.2	2.2	2.2	4.2	4.2
<b>PRINTING AND MAILING</b>										
Printing and Mailing Specialist	2	2	2	2	2	2	2	2	2	2
Printing and Mailing Lead	1	1	1	1	1	1	1	1	1	1
Printing and Graphic Design Specialist	1	1	1	1	1	1	1	1	1	1
	4	4	4	4	4	4	4	4	4	4
<b>TOTAL</b>	<b>177.5</b>	<b>172.0</b>	<b>154.0</b>	<b>152.7</b>	<b>151.2</b>	<b>134.2</b>	<b>134.2</b>	<b>137.0</b>	<b>140.8</b>	<b>139.8</b>



# SECTION 9





1996 / 1997 through 2025 / 2026 MTA DUES AS A % OF AVERAGE SALARY									
FISCAL YEAR	MTA ANNUAL DUES	ESTIMATED AVERAGE TEACHER SALARY *	DUES AS A % OF AVERAGE TEACHER SALARY	BEGINNING TEACHER SALARY *	DUES AS A % OF BEGINNING TEACHER SALARY	DUES ADJUSTED FOR INFLATION FY26 \$			
1996 / 1997	\$266	\$42,874	0.62%	\$25,570	1.04%	\$530			
1997 / 1998	\$275	\$44,051	0.62%	\$26,511	1.04%	\$540			
1998 / 1999	\$296	\$45,149	0.66%	\$27,361	1.08%	\$569			
1999 / 2000	\$296	\$46,580	0.64%	\$28,228	1.05%	\$551			
2000 / 2001	\$296	\$48,649	0.61%	\$29,431	1.01%	\$533			
2001 / 2002	\$302	\$49,242	0.61%	\$30,642	0.98%	\$536			
2002 / 2003	\$312	\$51,803	0.60%	\$31,716	0.98%	\$544			
2003 / 2004	\$314	\$53,733	0.58%	\$32,791	0.96%	\$532			
2004 / 2005	\$330	\$54,701	0.60%	\$33,775	0.98%	\$544			
2005 / 2006	\$338	\$56,366	0.60%	\$34,982	0.97%	\$536			
2006 / 2007	\$364	\$58,258	0.62%	\$35,949	1.01%	\$562			
2007 / 2008	\$373	\$64,164	0.58%	\$37,208	1.00%	\$552			
2008 / 2009	\$397	\$67,572	0.59%	\$38,119	1.04%	\$593			
2009 / 2010	\$424	\$68,781	0.62%	\$38,990	1.09%	\$622			
2010 / 2011	\$433	\$70,340	0.62%	\$39,632	1.09%	\$615			
2011 / 2012	\$446	\$70,960	0.63%	\$40,506	1.10%	\$622			
2012 / 2013	\$450	\$71,983	0.63%	\$41,015	1.10%	\$619			
2013 / 2014	\$456	\$73,966	0.62%	\$41,630	1.10%	\$614			
2014 / 2015	\$459	\$74,744	0.61%	\$42,625	1.08%	\$618			
2015 / 2016	\$459	\$76,656	0.60%	\$43,437	1.06%	\$611			
2016 / 2017	\$464	\$78,670	0.59%	\$44,263	1.05%	\$606			
2017 / 2018	\$474	\$80,204	0.59%	\$45,522	1.04%	\$603			
2018 / 2019	\$474	\$82,379	0.58%	\$46,156	1.03%	\$592			
2019 / 2020	\$477	\$84,638	0.56%	\$47,622	1.00%	\$593			
2020 / 2021	\$480	\$87,051	0.55%	\$48,342	0.99%	\$570			
2021 / 2022	\$483	\$90,784	0.53%	\$49,578	0.97%	\$528			
2022 / 2023	\$483	\$89,576	0.54%	\$51,034	0.95%	\$508			
2023 / 2024	\$503	\$92,711	0.54%	\$52,289	0.96%	\$514			
2024 / 2025	\$536	\$95,956	0.56%	\$54,119	0.99%	\$548			
2025 / 2026 (EXECUTIVE COMMITTEE PROPOSED)	\$550	\$99,315	0.55%	\$56,013	0.98%	\$550			

\*SOURCE: NEA; DESE, Office of School Finance, FY19 - FY23 Average Teacher Salaries data; MTA RESEARCH

**PROPOSED 2025- 2026 MTA EDUCATION SUPPORT PROFESSIONAL (ESP) DUES AS A % OF SALARY**

	Proposed FY26 Education Support Professional DUES	Salary Example 1	Dues as % of Salary Example 1	Salary Example 2	Dues as % of Salary Example 2
Clerical staff and custodian DUES (60% of Full time)	\$330	\$45,000	0.7%	\$55,000	0.6%
Paraeducators, food service personnel, and other ESP DUES (30% of Full time)	\$165	\$25,000	0.7%	\$40,000	0.4%

1996 / 1997 through 2025 / 2026 MTA MEMBERSHIP LEVELS AS OF JUNE 30

FULL TIME EQUIVALENTS

<u>FISCAL YEAR</u>	<u>BUDGET</u>	<u>ACTUAL</u>	<u>INCREASE / (DECREASE) VERSUS BUDGET</u>	<u>YOY Actuals</u>		<u>YOY Actuals Increase/(Decrease) %</u>
				<u>Increase/(Decrease)</u>	<u>Increase/(Decrease) %</u>	
1996 / 1997	64,100	66,242	2,142	1,869	2,790	2.90%
1997 / 1998	66,250	69,032	2,782	2,790	2,790	4.21%
1998 / 1999	69,000	71,775	2,775	2,743	2,743	3.97%
1999 / 2000	72,005	74,233	2,228	2,458	2,458	3.42%
2000 / 2001	74,000	76,781	2,781	2,548	2,548	3.43%
2001 / 2002	76,575	78,880	2,305	2,099	2,099	2.73%
2002 / 2003	78,875	78,668	(207)	(212)	(212)	-0.27%
2003 / 2004	78,000	77,585	(415)	(1,083)	(1,083)	-1.38%
2004 / 2005	75,500	78,416	2,916	831	831	1.07%
2005 / 2006	77,000	79,920	2,920	1,504	1,504	1.92%
2006 / 2007	79,500	81,871	2,371	1,951	1,951	2.44%
2007 / 2008	80,527	82,657	2,130	786	786	0.96%
2008 / 2009	81,515	83,908	2,393	1,251	1,251	1.51%
2009 / 2010	79,720	83,509	3,789	(399)	(399)	-0.48%
2010 / 2011	79,275	82,921	3,646	(588)	(588)	-0.70%
2011 / 2012	80,000	83,495	3,495	574	574	0.69%
2012 / 2013	81,500	84,229	2,729	734	734	0.88%
2013 / 2014	82,000	85,295	3,295	1,066	1,066	1.27%
2014 / 2015	83,800	86,135	2,335	840	840	0.98%
2015 / 2016	86,000	87,149	1,149	1,014	1,014	1.18%
2016 / 2017	86,380	87,407	1,027	258	258	0.30%
2017 / 2018	88,000	88,333	333	926	926	1.06%
2018 / 2019	79,920	88,280	8,360	(53)	(53)	-0.06%
2019 / 2020	84,988	89,214	4,226	934	934	1.06%
2020 / 2021	89,290	87,738	(1,552)	(1,476)	(1,476)	-1.65%
2021 / 2022	89,290	89,187	(103)	1,449	1,449	1.65%
2022 / 2023	89,506	90,302	796	1,115	1,115	1.25%
2023 / 2024	91,110	90,673	(437)	371	371	0.41%
2024 / 2025	92,243	91,062	(1,181)	389	389	0.43%
2025 / 2026 (PROPOSED)	92,243					as of 2/28/2025



# SECTION 10



A DIVERSE UNION  
*of* EDUCATION  
WORKERS

**Comparative Budget to Actual Report FY 2021 - DECEMBER FY2025**

LN NO.		2020-2021				2021-2022			
		ANNUAL MEETING APPROVED BUDGET	ACTUAL AS OF 6/30/21	Variance from Budget Increase/ (Decrease)		ANNUAL MEETING APPROVED BUDGET	ACTUAL AS OF 6/30/22	Variance from Budget Increase/ (Decrease)	
				\$	%			\$	%
<b>REVENUE</b>									
	<b>MEMBERSHIP DUES</b>	\$500.00	\$500.00	\$0.00	0.0%	\$503.00	\$503.00	\$0.00	0.0%
	FTE's	89,290	87,738	(1,552)	-1.7%	89,290	89,187	(103)	-0.1%
1	Affiliation Dues	42,859,200	42,084,251	(774,949)	-1.8%	43,127,078	42,974,112	(152,966)	-0.4%
	Public Relations Campaign Dues	1,785,800	1,784,760	(31,040)	-1.7%	1,785,800	1,783,740	(2,060)	-0.1%
	<b>TOTAL MEMBERSHIP DUES</b>	<b>44,645,000</b>	<b>43,839,011</b>	<b>(805,989)</b>	<b>-1.8%</b>	<b>44,912,878</b>	<b>44,757,852</b>	<b>(155,026)</b>	<b>-0.3%</b>
<b>PROGRAM REVENUE</b>									
	NEA UniServ Training Funds								
2	NEA UniServ Funding - Full Time	2,442,926	2,439,560	(3,366)	-0.1%	2,550,302	2,583,426	33,124	1.3%
3	NEA UniServ Funding - Part Time	236,400	203,566	(32,834)	-13.9%	234,784	232,760	(2,024)	-0.9%
4	NEA Funds - Project/Grant Revenue	0	181,409	181,409	0.0%	0	74,956	74,956	0.0%
5	NEA Legal Reimbursement	1,600,000	1,591,059	(8,941)	-0.6%	1,600,000	1,524,720	(75,280)	-4.7%
6	Insurance & Court/ Reimbursement of Attorney's Fees	8,000	24,296	16,296	203.7%	10,000	74,309	64,309	643.1%
7	Conference/Workshop Revenue	26,259	(20)	(26,279)	-100.1%	20,000	3,961	(16,039)	-80.2%
8	Summer Conference Revenue	43,000	0	(43,000)	-100.0%	43,000	0	(43,000)	-100.0%
9	Workers Compensation Reimbursement	50,000	45,354	(4,646)	-9.3%	50,000	37,840	(12,160)	-24.3%
10	Annual Meeting Revenue	21,000	0	(21,000)	-100.0%	21,000	20,250	(750)	-3.6%
11	Newspaper Advertising	75,000	77,558	2,558	3.4%	75,000	77,613	2,613	3.5%
12	Printing Income	50,000	36,290	(13,710)	-27.4%	50,000	51,547	1,547	3.1%
13	Human Civil Rights & Awards Revenue	600	0	(600)	-100.0%	600	0	(600)	-100.0%
	<b>Total Program Revenue</b>	<b>4,553,185</b>	<b>4,599,072</b>	<b>45,887</b>	<b>1.0%</b>	<b>4,654,686</b>	<b>4,681,382</b>	<b>26,696</b>	<b>0.6%</b>
<b>OTHER INCOME</b>									
14	Interest income	1,500,000	1,410,015	(89,985)	-6.0%	1,500,000	911,176	(588,824)	-39.3%
	Realized Gain/(Loss) on Investment Sales	0	4,914,413	4,914,413	0.0%	0	14,199,282	14,199,282	0.0%
15	MTA Benefits / Miscellaneous Income	143,000	146,938	3,938	2.8%	146,000	170,792	24,792	17.0%
16	Property Casualty Endorsement and Royalty Income	0	229,668	229,668	0.0%	300,207	260,775	(39,432)	-0.0%
	<b>Total Other Income</b>	<b>1,643,000</b>	<b>6,701,034</b>	<b>5,058,034</b>	<b>307.9%</b>	<b>1,946,207</b>	<b>15,542,025</b>	<b>13,595,818</b>	<b>698.6%</b>
	<b>TOTAL OPERATING REVENUE</b>	<b>50,841,185</b>	<b>55,139,117</b>	<b>4,297,932</b>	<b>8.5%</b>	<b>51,513,771</b>	<b>64,981,259</b>	<b>13,467,488</b>	<b>26.1%</b>
<b>EXPENSES</b>									
<b>SALARIES &amp; FRINGE BENEFITS</b>									
1	Salaries	16,850,632	15,951,639	(898,993)	-5.3%	17,196,492	17,059,574	(136,918)	-0.8%
2	Wages	4,135,459	4,313,272	177,813	4.3%	4,313,106	3,796,945	(516,161)	-12.0%
	Legal Interns/Student Interns	0	0	0	0.0%	0	0	0	0.0%
3	Part - Time Staff (Affil. Serv/Legal/PD/SDC)	685,000	566,889	(118,111)	-17.2%	632,500	527,151	(105,349)	-16.7%
4	Overtime	148,900	133,824	(15,076)	-10.1%	148,900	209,187	60,287	40.5%
5	FICA	1,496,113	1,470,262	(25,851)	-1.7%	1,571,157	1,545,254	(25,903)	-1.6%
6	Pension	7,021,538	8,603,350	1,581,812	22.5%	6,951,181	6,822,629	(128,552)	-1.8%
7	Health & Dental Insurance	3,132,735	2,868,798	(263,937)	-8.4%	3,331,590	3,205,226	(126,364)	-3.8%
8	Post Retirement Health Insurance	369,999	1,296,754	926,755	250.5%	390,002	1,162,872	772,870	198.2%
9	Life Insurance	116,067	116,560	493	0.4%	119,266	103,536	(15,730)	-13.2%
10	Short, Long Term Disability & PFMLA	209,865	128,483	(81,382)	-38.8%	265,290	120,081	(145,209)	-54.7%
11	State/Fed Unemployment Tax/Universal Health	79,057	225,607	146,550	185.4%	70,676	99,323	28,647	40.5%
12	Workers Compensation	30,000	27,741	(2,259)	-7.5%	30,001	21,375	(8,626)	-28.8%
	<b>Total Salaries &amp; Fringe Benefits</b>	<b>34,275,365</b>	<b>35,703,179</b>	<b>1,427,814</b>	<b>4.2%</b>	<b>35,020,161</b>	<b>34,673,153</b>	<b>(347,008)</b>	<b>-1.0%</b>
	* Not a Budgeted Item								
<b>CONTRACTED ADMINISTRATIVE SERVICES &amp; PROF. FEES</b>									
*	Temporary Help - Clerical	14,586	254,995	240,409	1648.2%	0	253,940	253,940	0.0%
13	Consultants	170,000	207,103	37,103	21.8%	157,500	219,004	61,504	39.1%
	Diversity & Inclusion	7,500	0	(7,500)	-100.0%	0	0	0	0.0%
14	Audit Fees	75,000	57,159	(17,841)	-23.8%	54,000	41,082	(12,918)	-23.9%
15	Investment Consulting Fees	440,000	531,004	91,004	20.7%	475,000	500,075	25,075	5.3%
16	Payroll & HR Service Fees	53,000	56,489	3,489	6.6%	78,000	62,096	(15,904)	-20.4%
17	Corporate Counsel	75,000	159,148	84,148	112.2%	143,436	533,421	389,985	271.9%
	<b>Total Contracted Administrative Services &amp; Professional Fees</b>	<b>835,086</b>	<b>1,265,898</b>	<b>430,812</b>	<b>51.6%</b>	<b>907,936</b>	<b>1,609,618</b>	<b>701,682</b>	<b>77.3%</b>
<b>FACILITIES &amp; TELEPHONE</b>									
18	Telephone	202,947	189,928	(13,019)	-6.4%	202,947	190,640	(12,307)	-6.1%
19	Rent	1,592,258	1,417,395	(174,863)	-11.0%	1,640,123	1,417,496	(222,627)	-13.6%
20	Janitorial Supplies / Services	36,988	28,206	(8,782)	-23.7%	38,788	40,880	2,092	5.4%
	Non-capital Moving Expenses	0	9,354	9,354	0.0%	0	0	0	0.0%
21	Utilities and Operating Expenses - Leaseholds	283,691	212,604	(71,087)	-25.1%	294,896	191,846	(103,050)	-34.9%
	<b>Total Facilities &amp; Telephone</b>	<b>2,115,884</b>	<b>1,857,487</b>	<b>(258,397)</b>	<b>-12.2%</b>	<b>2,176,754</b>	<b>1,840,862</b>	<b>(335,892)</b>	<b>-15.4%</b>
<b>BUSINESS EXPENSES</b>									
	Travel - Out-of-Town	0	0	0	0.0%	0	0	0	0.0%
22	Travel - Mileage	379,800	31,888	(347,912)	-91.6%	300,001	79,634	(220,367)	-73.5%
23	Travel - Other	268,362	155,538	(112,824)	-42.0%	216,998	347,530	130,532	60.2%
24	Travel and Residence - President's Expenses	30,000	(60)	(30,060)	-100.2%	30,000	9,033	(20,967)	-69.9%
25	Travel - Vice President's Expenses	52,000	27,784	(24,216)	-46.6%	52,000	36,434	(15,566)	-29.9%
	<b>Total Business Expenses</b>	<b>730,162</b>	<b>215,150</b>	<b>(515,012)</b>	<b>-70.5%</b>	<b>598,999</b>	<b>472,631</b>	<b>(126,368)</b>	<b>-21.1%</b>

**Comparative Budget to Actual Report FY 2021 - DECEMBER FY2025**

2022-2023		Variance from Budget		2023-2024		Variance from Budget		2024-2025		LN	
ANNUAL MEETING APPROVED BUDGET	ACTUAL AS OF 6/30/23	Increase/ (Decrease)	%	ANNUAL MEETING APPROVED BUDGET	ACTUAL AS OF 6/30/24	Increase/ (Decrease)	%	ANNUAL MEETING APPROVED BUDGET	ACTUAL AS OF 12/31/24	AS OF 12/31/24	NO.
		\$	%			\$	%				
\$503.00	\$503.00	\$0.00	0.0%	\$523.00	\$523.00	\$0.00	0.0%	\$556.00	\$556.00	\$556.00	
89,506	90,302	796	0.9%	91,110	90,673	(437)	-0.5%	92,243	91,240	92,243	
43,226,804	43,481,718	254,914	0.6%	45,828,330	45,449,297	(379,033)	-0.8%	49,442,084	19,456,615	19,776,836	1
1,790,120	1,806,040	15,920	0.9%	1,822,200	1,813,460	(8,740)	-0.5%	1,844,860	729,920	737,944	
45,016,924	45,287,758	270,834	0.6%	47,650,530	47,262,757	(387,773)	-0.8%	51,286,944	20,186,535	20,514,780	
2,674,165	2,634,624	(39,541)	-1.5%	2,614,508	2,730,634	116,126	4.4%	2,923,220	1,623,812	1,461,610	2
246,840	222,296	(24,544)	-9.9%	222,296	284,691	62,395	28.1%	312,855	111,702	156,427	3
120,000	377,598	257,598	214.7%	75,000	456,444	381,444	508.6%	225,000	162,832	225,000	4
1,600,000	1,345,665	(254,335)	-15.9%	1,600,000	1,327,697	(272,303)	-17.0%	1,600,000	769,223	799,998	5
10,000	2,600	(7,400)	-74.0%	20,000	6,688	(13,312)	-66.6%	20,000	52,629	10,002	6
20,000	10,711	(9,289)	-46.4%	21,000	6,439	(14,561)	-69.3%	21,000	2,007	10,500	7
23,000	0	(23,000)	-100.0%	24,150	37,644	13,494	55.9%	24,150	0	24,150	8
50,000	51,427	1,427	2.9%	60,000	60,131	131	0.2%	60,000	6,814	30,000	9
20,000	20,000	0	0.0%	20,000	20,481	481	2.4%	20,000	0	0	10
75,000	77,498	2,498	3.3%	40,000	42,250	2,250	5.6%	40,000	21,126	20,000	11
50,000	114,025	64,025	128.1%	50,000	93,550	43,550	87.1%	50,000	89,398	25,002	12
600	0	(600)	-100.0%	600	0	(600)	-100.0%	600	0	0	13
4,889,605	4,856,444	(33,161)	-0.7%	4,747,554	5,066,649	319,095	6.7%	5,296,825	2,839,543	2,762,689	
1,500,000	1,556,155	56,155	3.7%	1,274,641	1,819,033	544,392	42.7%	1,442,986	980,241	721,494	14
0	(1,616,244)	(1,616,244)	0.0%	0	729,747	729,747	0.0%	0	1,000,575	0	
146,000	164,119	18,119	12.4%	171,000	144,906	(26,094)	-15.3%	163,000	84,944	81,498	15
300,000	221,614	(78,386)	-26.1%	200,000	244,740	44,740	22.4%	200,000	30,099	100,002	16
1,946,000	325,644	(1,620,356)	-83.3%	1,645,641	2,938,426	1,292,785	78.6%	1,805,986	2,095,859	902,994	
51,852,529	50,469,846	(1,382,683)	-2.7%	54,043,725	55,267,832	1,224,107	2.3%	58,389,755	25,121,937	24,180,463	
17,429,906	17,256,342	(173,564)	-1.0%	18,440,040	17,938,499	(501,541)	-2.7%	19,458,346	10,067,419	9,729,197	1
4,458,124	3,897,599	(560,525)	-12.6%	4,230,179	4,224,402	(5,777)	-0.1%	4,603,918	2,605,277	2,401,966	2
0	0	0	0.0%	0	2,000	2,000	0.0%	0	7,000	-	
562,500	547,975	(14,525)	-2.6%	627,500	579,268	(48,232)	-7.7%	740,000	321,615	369,996	3
148,000	268,916	120,916	81.7%	173,000	339,708	166,708	96.4%	173,000	214,210	86,494	4
1,591,175	1,632,909	41,734	2.6%	1,743,201	1,736,882	(6,319)	-0.4%	1,925,964	1,037,348	963,018	5
6,206,984	1,641,314	(4,565,670)	-73.6%	6,442,507	1,264,486	(5,178,021)	-80.4%	6,287,091	3,159,451	3,089,836	6
3,695,753	3,426,041	(269,712)	-7.3%	4,155,833	4,060,170	(95,663)	-2.3%	5,135,342	2,767,815	2,516,409	7
399,996	760,302	360,306	90.1%	400,000	815,313	415,313	103.8%	422,793	211,398	207,375	8
119,055	106,509	(12,546)	-10.5%	119,090	108,979	(10,111)	-8.5%	133,402	73,678	66,708	9
179,579	125,042	(54,537)	-30.4%	181,864	133,039	(48,825)	-26.8%	240,145	187,487	120,084	10
63,718	199,521	135,803	213.1%	117,430	231,295	113,865	97.0%	92,564	37,224	46,302	11
33,003	22,246	(10,757)	-32.6%	25,001	36,319	11,318	45.3%	29,315	20,652	14,431	12
34,887,793	29,884,716	(5,003,077)	-14.3%	36,655,645	31,470,360	(5,185,285)	-14.1%	39,241,880	20,710,574	19,611,816	
0	290,103	290,103	0.0%	0	130,691	130,691	0.0%	0	122,154	0	
225,000	461,254	236,254	105.0%	200,000	542,369	342,369	171.2%	200,000	220,257	100,002	13
0	0	0	0.0%	0	0	0	0.0%	0	0	0	
60,000	108,241	48,241	80.4%	60,000	91,300	31,300	52.2%	90,000	45,735	45,000	14
425,000	226,564	(198,436)	-46.7%	204,664	223,753	19,089	9.3%	230,000	108,954	115,002	15
78,000	61,875	(16,125)	-20.7%	70,000	75,447	5,447	7.8%	120,000	46,103	60,000	16
125,000	319,685	194,685	155.7%	125,000	59,915	(65,085)	-52.1%	100,000	67,699	49,998	17
913,000	1,467,722	554,722	60.8%	659,664	1,123,475	463,811	70.3%	740,000	610,902	370,002	
200,000	183,725	(16,275)	-8.1%	200,000	223,518	23,518	11.8%	150,000	73,852	75,000	18
1,711,132	1,454,987	(256,145)	-15.0%	1,788,646	1,743,092	(45,554)	-2.5%	1,831,689	938,824	915,846	19
43,648	45,055	1,407	3.2%	44,128	36,555	(7,573)	-17.2%	53,635	16,390	26,814	20
0	0	0	0.0%	0	28,205	28,205	0.0%	0	0	0	
304,026	285,999	(18,027)	-5.9%	264,945	311,228	46,283	17.5%	429,850	151,111	214,920	21
2,258,806	1,969,766	(289,040)	-12.8%	2,297,719	2,342,598	44,879	2.0%	2,465,174	1,180,177	1,232,580	
0	0	0	0.0%	0	0	0	0.0%	0	109,573	0	
234,998	261,448	26,450	11.3%	234,996	255,827	20,831	8.9%	234,996	125,809	116,962	22
215,001	374,521	159,520	74.2%	215,012	441,488	226,476	105.3%	215,012	137,160	104,422	23
40,000	55,277	15,277	38.2%	52,000	42,184	(9,816)	-18.9%	0	21,485	-	24
0	24,559	24,559	0.0%	22,000	15,540	(6,460)	-0.0%	0	8,732	-	25
489,999	715,805	225,806	46.1%	524,008	755,039	231,031	44.1%	450,008	402,759	221,384	

**Comparative Budget to Actual Report FY 2021 - DECEMBER FY2025**

LN NO.		2020-2021				2021-2022			
		ANNUAL MEETING APPROVED BUDGET	ACTUAL AS OF 6/30/21	Variance from Budget Increase/ (Decrease)		ANNUAL MEETING APPROVED BUDGET	ACTUAL AS OF 6/30/22	Variance from Budget Increase/ (Decrease)	
				\$	%			\$	%
<b>PROGRAM EXPENSES</b>									
<i>Field &amp; Organizing</i>									
26	State and Local Organizing	223,000	190,286	(32,714)	-14.7%	223,000	281,428	58,428	26.2%
27	Higher Ed Membership Data Reimbursement	35,000	35,000	0	0.0%	35,000	35,000	0	0.0%
28	Large Locals	14,773	330	(14,443)	-97.8%	14,773	5,522	(9,251)	-62.6%
29	Health & Welfare Initiatives Consultant	70,000	26,100	(43,900)	-62.7%	70,000	29,100	(40,900)	-58.4%
30	Indoor Air Quality/Workplace Health/Safety Consultant	109,828	233,504	123,676	112.6%	75,000	89,641	14,641	19.5%
31	Local Office Support	1,770,000	1,734,514	(35,486)	-2.0%	1,800,000	1,843,024	43,024	2.4%
32	Membership Materials / I.D. Cards	154,600	68,829	(85,771)	-55.5%	154,600	91,747	(62,853)	-40.7%
33	Staff Meetings / Training	42,000	0	(42,000)	-100.0%	42,000	50,697	8,697	20.7%
34	Higher Ed Leadership Meetings	5,000	0	(5,000)	-100.0%	5,000	304	(4,696)	-93.9%
35	MTA Reporter (Retired)	25,000	34,761	9,761	39.0%	25,000	38,024	13,024	52.1%
36	Membership Recruitment	10,000	439	(9,561)	-95.6%	10,000	1,525	(8,475)	-84.8%
37	Contract Data Research System	14,000	11,550	(2,450)	-17.5%	14,000	44,480	30,480	217.7%
	Collective Bargaining/Crisis Funds	25,000	12,125	(12,875)	-51.5%	40,000	0	(40,000)	-100.0%
	Part Time Rep Meetings / Training	0	184	184	0.0%	0	0	0	0.0%
	Higher Ed Negotiations Support	30,000	29,573	(427)	-1.4%	0	0	0	0.0%
	Local President Release Time	0	11,739	11,739	0.0%	0	0	0	0.0%
	Printing	0	0	0	0.0%	0	0	0	0.0%
	Interest Based Bargaining	0	0	0	0.0%	0	0	0	0.0%
	New Member Stipends-FY23 incl w/S&L Organizing	0	0	0	0.0%	0	0	0	0.0%
	NEA Grant Expenses	0	0	0	0.0%	0	0	0	0.0%
	Higher Ed Organizing Program (NEA)	0	0	0	0.0%	0	0	0	0.0%
	FOF - Promise/Cherish Acts	0	1,768	1,768	0.0%	0	0	0	0.0%
	Intern Program Recruitment Program Study	0	0	0	0.0%	0	0	0	0.0%
	Early Childhood Organizing/Common Core PARCC Organizing	0	0	0	0.0%	0	0	0	0.0%
	<b>Subtotal Field &amp; Organizing</b>	<b>2,528,201</b>	<b>2,390,702</b>	<b>(137,499)</b>	<b>-5.4%</b>	<b>2,508,373</b>	<b>2,510,492</b>	<b>2,119</b>	<b>0.1%</b>
<i>Training and Professional Learning</i>									
38	Leadership and Organizational Development	168,000	57,307	(110,693)	-65.9%	168,000	26,143	(141,857)	-84.4%
39	Union Skills	0	0	0	0.0%	0	0	0	0.0%
40	Summer Conference Expenses	290,598	61,093	(229,505)	-79.0%	260,598	74,041	(186,557)	-71.6%
41	Workshops/Professional Development	118,000	76,665	(41,335)	-35.0%	118,000	6,840	(111,160)	-94.2%
42	New Member Conferences	39,312	2,796	(36,516)	-92.9%	39,312	1,931	(37,381)	-95.1%
43	Ethnic Minority Affairs Program & Conference	35,000	19,213	(15,787)	-45.1%	35,000	39,244	4,244	12.1%
44	Higher Ed Conference	17,500	0	(17,500)	-100.0%	17,500	0	(17,500)	-100.0%
45	ESP Leadership & Professional Development	55,800	2,850	(52,950)	-94.9%	55,800	37,801	(17,999)	-32.3%
46	ESP Conference	96,230	4,408	(91,822)	-95.4%	96,230	63,282	(32,948)	-34.2%
47	Retired Conference & Gatherings	60,480	2,465	(58,015)	-95.9%	60,480	3,239	(57,241)	-94.6%
48	General Conference Supplies & Services	54,400	5,912	(48,488)	-89.1%	30,000	702	(29,298)	-97.7%
	Occ Vocational Conference	0	0	0	0.0%	0	0	0	0.0%
	NEA Grant Expenses	0	0	0	0.0%	0	0	0	0.0%
	<b>Subtotal Training and Professional Learning</b>	<b>935,320</b>	<b>232,709</b>	<b>(702,611)</b>	<b>-75.1%</b>	<b>880,920</b>	<b>253,223</b>	<b>(627,697)</b>	<b>-71.3%</b>
<i>Legislation, Policy and Political Action</i>									
49	Local Grants/Political Action Leaders	52,500	44,450	(8,050)	-15.3%	75,000	43,750	(31,250)	-41.7%
50	Regional Team Organizing	2,000	0	(2,000)	-100.0%	10,000	0	(10,000)	-100.0%
51	State Conventions	10,000	0	(10,000)	-100.0%	2,500	0	(2,500)	-100.0%
52	Local, State and Federal Elections & Issues##	345,000	43,206	(301,794)	-87.5%	345,000	10,923	(334,077)	-95.1%
53	VOTE - Political Contributions	14,999	9,300	(5,699)	-38.0%	14,999	10,850	(4,149)	-27.7%
54	Legislative Materials and Fees	38,000	12,320	(25,680)	-67.6%	38,000	24,227	(13,773)	-36.2%
55	State Budget / Issues Activities / Polling	175,000	171,706	(3,294)	-1.9%	225,000	95,867	(129,133)	-57.4%
56	Policy Development, Research and Monitoring	14,500	0	(14,500)	-100.0%	44,500	330	(44,170)	-99.3%
57	Higher Education Research & Policy	30,000	38,168	8,168	27.2%	30,000	0	(30,000)	-100.0%
	Lobby Registration (Senate District Coordinators)	0	0	0	0.0%	0	3,214	3,214	0.0%
	Organizing Meetings & Actions	5,000	0	(5,000)	-100.0%	10,000	112	(9,888)	-98.9%
	Member to Member Activities Elections	50,000	67,762	17,762	35.5%	75,000	3,145	(71,855)	-95.8%
	Member to Member Activities Legislation	10,000	9,754	(246)	-2.5%	25,000	402	(24,598)	-98.4%
	Massachusetts Budget & Policy Center	175,000	175,000	0	0.0%	175,000	175,000	0	0.0%
	Mass Alliance	20,000	20,000	0	0.0%	20,000	20,000	0	0.0%
	Monitoring/Influencing Education	1,500	0	(1,500)	-100.0%	1,500	0	(1,500)	-100.0%
	Grant Expenses	0	10,409	10,409	0.0%	0	24,988	24,988	0.0%
	Current Ballot Initiative	0	0	0	0.0%	0	4,279,804	4,279,804	0.0%
	Other Ballot Initiative	0	0	0	0.0%	0	40,472	40,472	0.0%
	MTA Legislative Agenda	0	0	0	0.0%	0	0	0	0.0%
	Fund Our Future Coalition Expenses	0	71,514	71,514	0.0%	0	0	0	0.0%
	<b>Sub-Total Legislation, Policy and Political Action</b>	<b>943,499</b>	<b>673,589</b>	<b>(269,910)</b>	<b>-28.6%</b>	<b>1,091,499</b>	<b>4,733,084</b>	<b>3,641,585</b>	<b>333.6%</b>
<i>Communications</i>									
58	Media/Policy Priorities	120,000	119,519	(481)	-0.4%	110,000	75,634	(34,366)	-31.2%
59	MTA Today	152,700	147,257	(5,443)	-3.6%	152,800	143,082	(9,718)	-6.4%
60	Website/Digital Communications	150,000	147,741	(2,259)	-1.5%	150,000	94,363	(55,637)	-37.1%
	Public Relations Campaign	1,785,800	949,749	(836,051)	-46.8%	1,785,800	477,779	(1,308,021)	-73.2%
	<b>Sub-Total Communications</b>	<b>2,208,500</b>	<b>1,364,266</b>	<b>(844,234)</b>	<b>-38.2%</b>	<b>2,198,600</b>	<b>790,858</b>	<b>(1,407,742)</b>	<b>-64.0%</b>



**Comparative Budget to Actual Report FY 2021 - DECEMBER FY2025**

LN NO.		2020-2021				2021-2022			
		ANNUAL MEETING APPROVED BUDGET	ACTUAL AS OF 6/30/21	Variance from Budget Increase/ (Decrease)		ANNUAL MEETING APPROVED BUDGET	ACTUAL AS OF 6/30/22	Variance from Budget Increase/ (Decrease)	
				\$	%			\$	%
<b>PROGRAM EXPENSES</b>									
<i>Field &amp; Organizing</i>									
26	State and Local Organizing	223,000	190,286	(32,714)	-14.7%	223,000	281,428	58,428	26.2%
27	Higher Ed Membership Data Reimbursement	35,000	35,000	0	0.0%	35,000	35,000	0	0.0%
28	Large Locals	14,773	330	(14,443)	-97.8%	14,773	5,522	(9,251)	-62.6%
29	Health & Welfare Initiatives Consultant	70,000	26,100	(43,900)	-62.7%	70,000	29,100	(40,900)	-58.4%
30	Indoor Air Quality/Workplace Health/Safety Consultant	109,828	233,504	123,676	112.6%	75,000	89,641	14,641	19.5%
31	Local Office Support	1,770,000	1,734,514	(35,486)	-2.0%	1,800,000	1,843,024	43,024	2.4%
32	Membership Materials / I.D. Cards	154,600	68,829	(85,771)	-55.5%	154,600	91,747	(62,853)	-40.7%
33	Staff Meetings / Training	42,000	0	(42,000)	-100.0%	42,000	50,697	8,697	20.7%
34	Higher Ed Leadership Meetings	5,000	0	(5,000)	-100.0%	5,000	304	(4,696)	-93.9%
35	MTA Reporter (Retired)	25,000	34,761	9,761	39.0%	25,000	38,024	13,024	52.1%
36	Membership Recruitment	10,000	439	(9,561)	-95.6%	10,000	1,525	(8,475)	-84.8%
37	Contract Data Research System	14,000	11,550	(2,450)	-17.5%	14,000	44,480	30,480	217.7%
	Collective Bargaining/Crisis Funds	25,000	12,125	(12,875)	-51.5%	40,000	0	(40,000)	-100.0%
	Part Time Rep Meetings / Training	0	184	184	0.0%	0	0	0	0.0%
	Higher Ed Negotiations Support	30,000	29,573	(427)	-1.4%	0	0	0	0.0%
	Local President Release Time	0	11,739	11,739	0.0%	0	0	0	0.0%
	Printing	0	0	0	0.0%	0	0	0	0.0%
	Interest Based Bargaining	0	0	0	0.0%	0	0	0	0.0%
	New Member Stipends-FY23 incl w/S&L Organizing	0	0	0	0.0%	0	0	0	0.0%
	NEA Grant Expenses	0	0	0	0.0%	0	0	0	0.0%
	Higher Ed Organizing Program (NEA)	0	0	0	0.0%	0	0	0	0.0%
	FOF - Promise/Cherish Acts	0	1,768	1,768	0.0%	0	0	0	0.0%
	Intern Program Recruitment Program Study	0	0	0	0.0%	0	0	0	0.0%
	Early Childhood Organizing/Common Core PARCC Organizing	0	0	0	0.0%	0	0	0	0.0%
	<b>Subtotal Field &amp; Organizing</b>	<b>2,528,201</b>	<b>2,390,702</b>	<b>(137,499)</b>	<b>-5.4%</b>	<b>2,508,373</b>	<b>2,510,492</b>	<b>2,119</b>	<b>0.1%</b>
<i>Training and Professional Learning</i>									
38	Leadership and Organizational Development	168,000	57,307	(110,693)	-65.9%	168,000	26,143	(141,857)	-84.4%
39	Union Skills	0	0	0	0.0%	0	0	0	0.0%
40	Summer Conference Expenses	290,598	61,093	(229,505)	-79.0%	260,598	74,041	(186,557)	-71.6%
41	Workshops/Professional Development	118,000	76,665	(41,335)	-35.0%	118,000	6,840	(111,160)	-94.2%
42	New Member Conferences	39,312	2,796	(36,516)	-92.9%	39,312	1,931	(37,381)	-95.1%
43	Ethnic Minority Affairs Program & Conference	35,000	19,213	(15,787)	-45.1%	35,000	39,244	4,244	12.1%
44	Higher Ed Conference	17,500	0	(17,500)	-100.0%	17,500	0	(17,500)	-100.0%
45	ESP Leadership & Professional Development	55,800	2,850	(52,950)	-94.9%	55,800	37,801	(17,999)	-32.3%
46	ESP Conference	96,230	4,408	(91,822)	-95.4%	96,230	63,282	(32,948)	-34.2%
47	Retired Conference & Gatherings	60,480	2,465	(58,015)	-95.9%	60,480	3,239	(57,241)	-94.6%
48	General Conference Supplies & Services	54,400	5,912	(48,488)	-89.1%	30,000	702	(29,298)	-97.7%
	Occ Vocational Conference	0	0	0	0.0%	0	0	0	0.0%
	NEA Grant Expenses	0	0	0	0.0%	0	0	0	0.0%
	<b>Subtotal Training and Professional Learning</b>	<b>935,320</b>	<b>232,709</b>	<b>(702,611)</b>	<b>-75.1%</b>	<b>880,920</b>	<b>253,223</b>	<b>(627,697)</b>	<b>-71.3%</b>
<i>Legislation, Policy and Political Action</i>									
49	Local Grants/Political Action Leaders	52,500	44,450	(8,050)	-15.3%	75,000	43,750	(31,250)	-41.7%
50	Regional Team Organizing	2,000	0	(2,000)	-100.0%	10,000	0	(10,000)	-100.0%
51	State Conventions	10,000	0	(10,000)	-100.0%	2,500	0	(2,500)	-100.0%
52	Local, State and Federal Elections & Issues##	345,000	43,206	(301,794)	-87.5%	345,000	10,923	(334,077)	-95.1%
53	VOTE - Political Contributions	14,999	9,300	(5,699)	-38.0%	14,999	10,850	(4,149)	-27.7%
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55	State Budget / Issues Activities / Polling	175,000	171,706	(3,294)	-1.9%	225,000	95,867	(129,133)	-57.4%
56	Policy Development, Research and Monitoring	14,500	0	(14,500)	-100.0%	44,500	330	(44,170)	-99.3%
57	Higher Education Research & Policy	30,000	38,168	8,168	27.2%	30,000	0	(30,000)	-100.0%
	Lobby Registration (Senate District Coordinators)	0	0	0	0.0%	0	3,214	3,214	0.0%
	Organizing Meetings & Actions	5,000	0	(5,000)	-100.0%	10,000	112	(9,888)	-98.9%
	Member to Member Activities Elections	50,000	67,762	17,762	35.5%	75,000	3,145	(71,855)	-95.8%
	Member to Member Activities Legislation	10,000	9,754	(246)	-2.5%	25,000	402	(24,598)	-98.4%
	Massachusetts Budget & Policy Center	175,000	175,000	0	0.0%	175,000	175,000	0	0.0%
	Mass Alliance	20,000	20,000	0	0.0%	20,000	20,000	0	0.0%
	Monitoring/Influencing Education	1,500	0	(1,500)	-100.0%	1,500	0	(1,500)	-100.0%
	Grant Expenses	0	10,409	10,409	0.0%	0	24,988	24,988	0.0%
	Current Ballot Initiative	0	0	0	0.0%	0	4,279,804	4,279,804	0.0%
	Other Ballot Initiative	0	0	0	0.0%	0	40,472	40,472	0.0%
	MTA Legislative Agenda	0	0	0	0.0%	0	0	0	0.0%
	Fund Our Future Coalition Expenses	0	71,514	71,514	0.0%	0	0	0	0.0%
	<b>Sub-Total Legislation, Policy and Political Action</b>	<b>943,499</b>	<b>673,589</b>	<b>(269,910)</b>	<b>-28.6%</b>	<b>1,091,499</b>	<b>4,733,084</b>	<b>3,641,585</b>	<b>333.6%</b>
<i>Communications</i>									
58	Media/Policy Priorities	120,000	119,519	(481)	-0.4%	110,000	75,634	(34,366)	-31.2%
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	Public Relations Campaign	1,785,800	949,749	(836,051)	-46.8%	1,785,800	477,779	(1,308,021)	-73.2%
	<b>Sub-Total Communications</b>	<b>2,208,500</b>	<b>1,364,266</b>	<b>(844,234)</b>	<b>-38.2%</b>	<b>2,198,600</b>	<b>790,858</b>	<b>(1,407,742)</b>	<b>-64.0%</b>



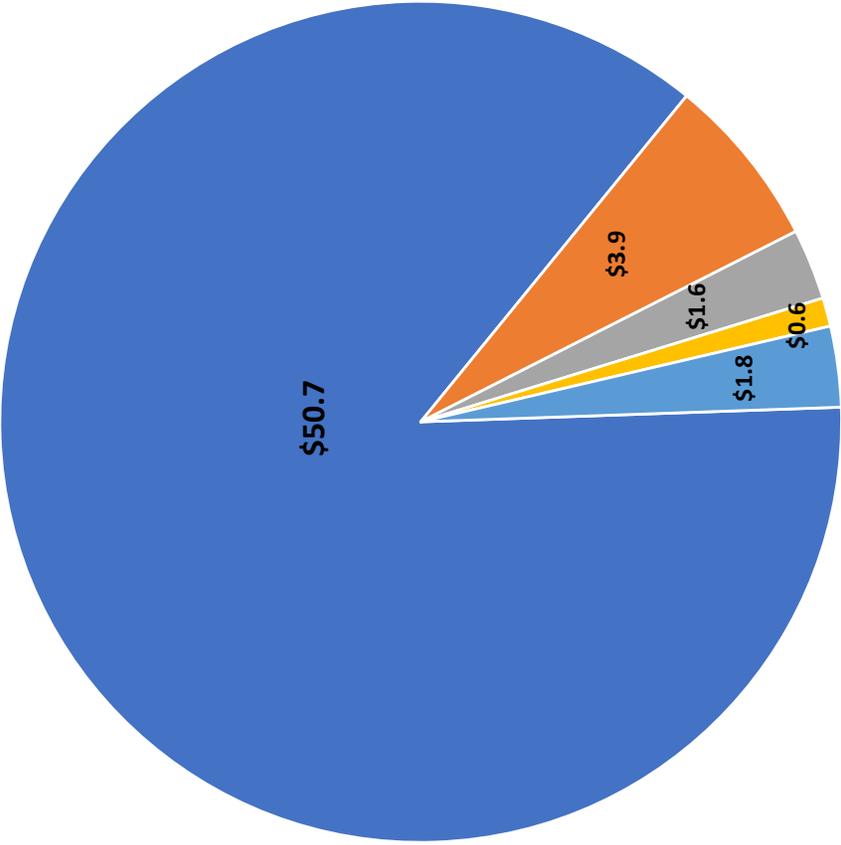


# SECTION 11





**SOURCES OF REVENUE**  
**2025-2026 PROPOSED BUDGET - EXECUTIVE COMMITTEE**  
**\$58,692,057**



■ AFFILIATION DUES (86.4%)

■ NEA GRANTS & UNISERVE FUNDING (6.6%)

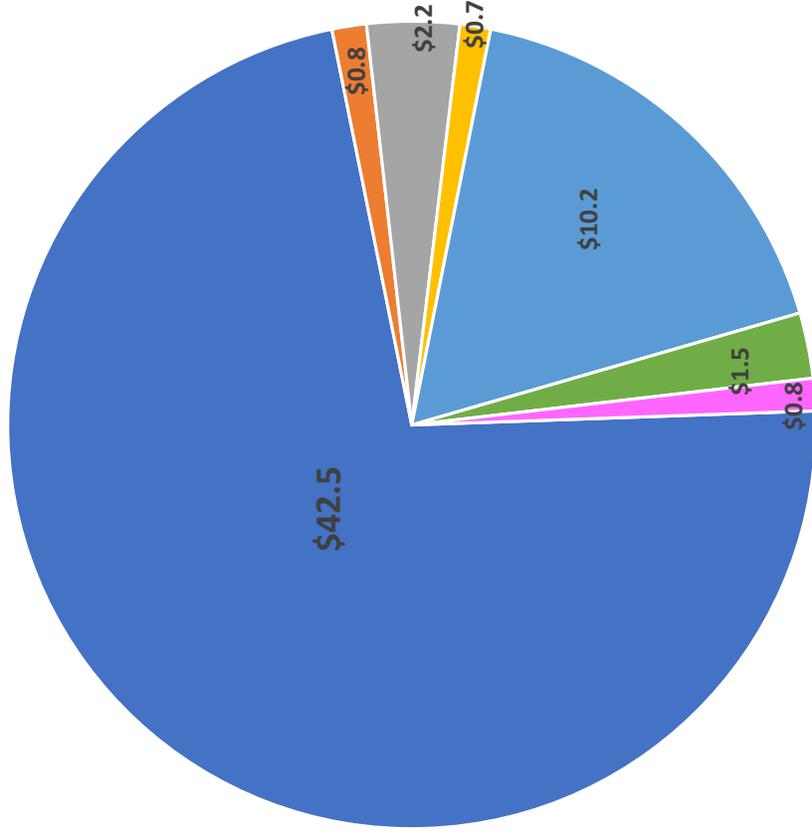
■ NEA LEGAL REIMBURSEMENTS (2.7%)

■ MISCELLANEOUS & PROGRAM REVENUE (1.1%)

■ INTEREST & DIVIDENDS (3.1%)

\$ Millions

**SOURCES OF EXPENDITURES**  
**2024-2025 PROPOSED BUDGET - BOARD OF DIRECTORS**  
**\$56,544,895**



- SALARIES & BENEFITS (72.4%)
- CONTRACTED & PROFESSIONAL FEES (1.4%)
- FACILITIES & TELEPHONE (3.7%)
- BUSINESS EXPENSES (1.2%)
- PROGRAM EXPENSES (17.4%)
- ADMINISTRATIVE EXPENSES (2.6%)
- DEPRECIATION / CONTINGENCY / MISCELLANEOUS (1.3%)

\$ Millions

# **MTA GRANT PROGRAMS for LOCALS**

In addition to the many local and statewide programs and activities funded through the MTA budget, MTA locals and committees have the opportunity to apply for grants to help fund specific projects or activities. Grant programs fortify organizing and membership activities, provide support in a bargaining crisis, subsidize the establishment of release time for presidents, assist locals to analyze health insurance benefits, strengthen local health & safety committees, and defray the administrative costs of running a local union. Additional grant programs help students in need and members who may have lost income due to union activity. (This list describes grant opportunities offered by the MTA and does not cover additional grants that may be available through the NEA) Grants can be accessed through a simple application process.

## **All In Grant**

Locals that develop a plan to build member power through engagement and action will receive between \$4 and \$10 per member depending on the number of locals that apply each fiscal year. Plan approval is contingent on maintaining and sharing with the MTA an accurate list of all bargaining unit members, the development and use of a two-way communication system, conducting intentional member conversations, and implementing organizing and mobilizing actions. This grant application process starts with developing an organizing plan with your MTA Field Representative-Organizer and is approved by the Field and Organizing Director.

## **Bargaining Crisis Funds**

In situations where locals have an expired contract, bargaining has reached impasse, and/or the local has filed an unfair labor practice related to negotiations, the local may apply for financial assistance of up to \$2,000 (an additional \$1,000 may be provided when the local matches the expenditures) for certain bargaining crisis expenses. This grant application is available through your MTA Field Representative-Organizer and is submitted to [rgatewood@massteacher.org](mailto:rgatewood@massteacher.org)

## **New Member Welcome Events**

This grant provides matching funds for half the cost of your event (such as socials, trainings, or union orientations) to welcome new members, up to \$500 per local/chapter. To access this funding, the local or chapter president should submit the receipts along with a short description of the event to [rgatewood@massteacher.org](mailto:rgatewood@massteacher.org)

## **Environmental Health & Safety Consulting on Indoor Air Quality and Workplace Health & Safety Issues**

In addition to assistance available from MTA's Health and Safety Organizer and expertise provided by MTA's Environmental Health & Safety Committee, locals may apply for consulting services on indoor air quality/workplace health and safety issues. Up to \$3,200 is provided for approved consulting advice, training, legal advice or representation. Requests are contingent on the local having a Health & Safety Committee of at least three members. The request must be signed by the local president and MTA Field Representative- Organizer and include the contact information for a member of the local H&S Committee.

### **Health Insurance Consulting through Boston Benefits Partners**

MTA has retained the consulting services of Boston Benefits Partners to provide expert advice and analysis on health care issues. Typically, these services are utilized when districts propose changes to the existing health plan design. Because the process to effectuate changes to health plan design may occur rapidly, it is essential that requests for services are filed as soon as a local is aware of that possibility. All applications should be completed by the local president and their Field Representative-Organizer and sent to the appropriate regional manager for approval.

### **Local President Release-Time Grant Program**

This MTA grant is designed to provide financial assistance to locals or chapters to fund paid release time for local presidents. Release time is traditionally full or half time, but MTA has supported alternative forms of union time, including but not limited to reduced teaching loads or schedules and release time in terms of days or hours. The presence of a local/chapter president with some release time helps build and develop strong organizing locals and increases rank and file member engagement. This application is developed with the MTA Field Representative-Organizer and regional manager and approved by the Field and Organizing Director.

### **Local Office Support**

Locals are eligible for financial support from MTA to defray a portion of the administrative costs of operating a local affiliate. Certain office, local officer compensation, and conference expenses may be reimbursed. There are strict filing timelines and procedures that are outlined in the MTA Policy Book. Guidelines require that locals submit requests for reimbursement on a quarterly basis.

### **Public Relations & Organizing (PRO) Grant**

The Public Relations/Organizing Campaign Committee supports MTA organizing and coalition-building efforts, as well as MTA's public relations and statewide campaigns, that promote public education at all levels. Grants to locals provide up to \$5,000 per fiscal year for public relations and organizing purposes, including the purchase of T-shirts, signs, and other materials, as well as related programs and activities. The PRO Committee also has the discretion to provide funding for more general campaigns and organizing activities. Further information and the application can be found at <https://massteacher.org/about-the-mta/committees/public-relations-organizing-campaign-committee>

### **Massachusetts Child**

The Massachusetts Child is a charitable corporation founded by MTA members in 1996 to help students struggling with financial need. Mass Child is a reimbursement program available to all MTA preK-12 local associations. Members use funds from their local associations to purchase qualifying items for students, as well as summer reading grants and extracurricular assistance for students, and Mass Child reimburses the local associations. For more information and application go to: [massteacher.org/opportunities-grants-awards/mass-child](https://massteacher.org/opportunities-grants-awards/mass-child)

# SECTION 12





# A Blueprint to Grow Our Collective Power

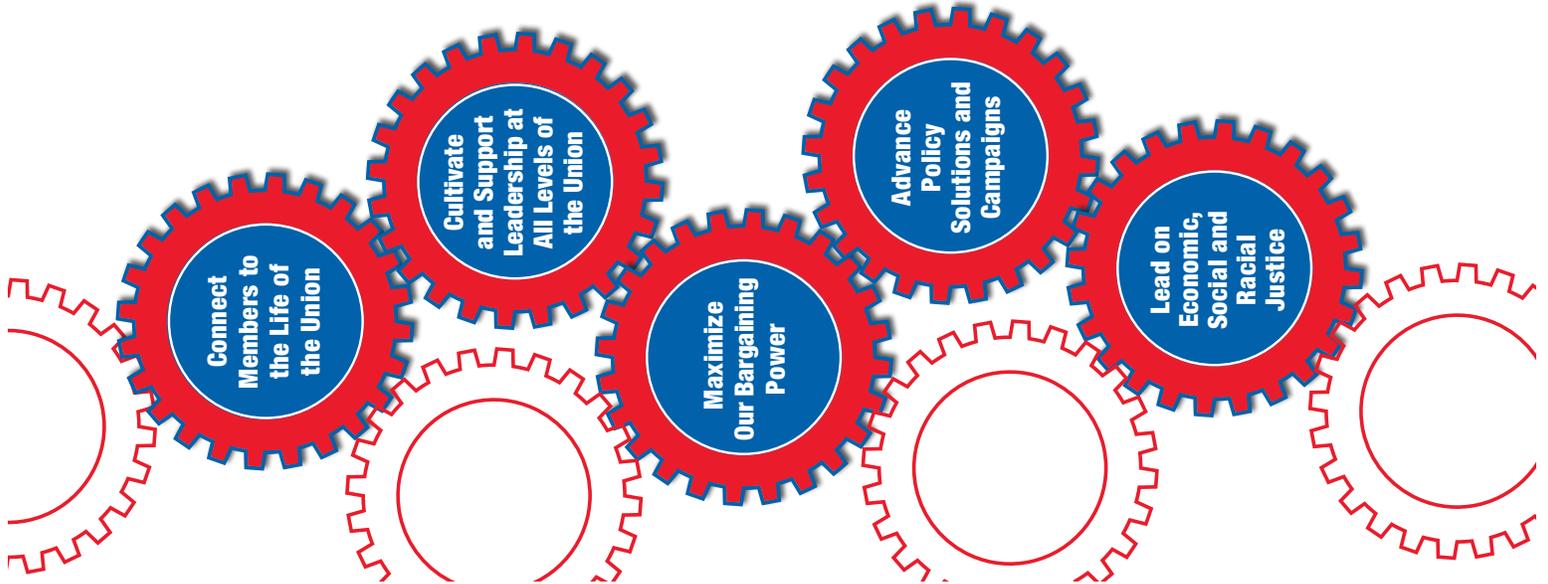
In the fall of 2019, the All In Blueprint Working Group, representing a broad cross section of locals and MTA constituencies, launched a strategic planning process. The group understood that dramatic changes were redefining the world in which our public schools and colleges – and our union – had to operate.

On the one hand was the need to respond to unprecedented challenges, from the U.S. Supreme Court’s *Janus* decision to the right-wing assault on the public sector bankrolled by dark money billionaires. Since then, our challenges have only been magnified by the COVID-19 pandemic. On the other hand, educators were organizing and winning campaigns for the common good at the bargaining table, on the picket line, in the State House, and at the ballot box.

The All In Blueprint Working Group implemented its charge by conducting a needs assessment survey that was completed by nearly two-thirds of MTA locals of all sizes in all regions and jurisdictions. Working group members facilitated 29 focus groups, including groups of local presidents, rank-and-file members by region, educators of color, preK-12 and higher education members, and ESP members. The MTA Board of Directors completed its own questionnaire and analysis, and in March 2020 it adopted the five Blueprint Strategic Priorities:

- #1: Connect Members to the Life of the Union**
- #2: Cultivate and Support Leadership at All Levels of the Union**
- #3: Maximize Our Bargaining Power**
- #4: Advance Policy Solutions and Campaigns**
- #5: Lead on Economic, Social and Racial Justice**

The Blueprint articulates the vision and aspirations of members, locals, and the MTA as a statewide union. The fiscal 2025-2026 budget was developed with the goal of continuing to sustain and invest in our capacity to achieve our five key priorities. Detail on specific programmatic initiatives to advance the Blueprint can be found in the line-item narratives of the budget. More detail on Blueprint accomplishments is also being provided in the Annual Report of the Executive Director-Treasurer, which will appear in the Delegate Handbook for the 2025 Annual Meeting. A full copy of the Blueprint is available at: [massteacher.org/blueprint](https://massteacher.org/blueprint).





Recommend to the MTA Board of Directors the adoption of the Annual Operating Budget of \$58,692,057 and an Operating Budget dues level of \$550, based on 92,243 full-time equivalent active members for the 2025-2026 fiscal year. Dues for clerical staff and custodians are to be \$330; dues for paraeducators, food service personnel and other Education Support Professionals are to be \$165.

Recommend to the MTA Board of Directors the adoption of the Annual Public Relations/ Organizing Campaign budget of \$1,844,860 and a Public Relations/Organizing Campaign dues level of \$20, based on 92,243 full-time equivalent active members for the 2025-2026 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.

MTA Board of Directors' Meeting  
**ITEM OF NEW BUSINESS**

Check One:     Proposed Policy     Proposed One-Time Action     Informational Item

---

**MOVED:**

1. When a member's life is lost at work, the MTA will encourage all of our local associations to have members present for memorial services, when possible, and to provide support for the family and community of the member whose life is lost at work.
2. The MTA will provide similar support for other NEA affiliates by having members present for memorial services, when possible, and by providing support for the family and the community of an NEA member whose life is lost at work.

**RATIONALE:**

**COST ESTIMATE:**

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**STAFF TIME ESTIMATE:**

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**SUBMITTED BY:**

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DATE OF MEETING: March 28-29, 2025

ITEM NO. 2025.03.28-29.2025 NBI02

MTA Board of Directors' Meeting  
**ITEM OF NEW BUSINESS**

Check One:     Proposed Policy     Proposed One-Time Action     Informational Item

---

**MOVED:**

Motion to provide MTA Members with a secure way to send emails to their representatives on the MTA BOD.

**RATIONALE:**

**COST ESTIMATE:**

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**STAFF TIME ESTIMATE:**

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**SUBMITTED BY:**

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MTA Board of Directors' Meeting  
**ITEM OF NEW BUSINESS**

Check One:    Proposed Policy    Proposed One-Time Action    Informational Item

---

**MOVED:**

The MTA web page entitled “Resources on the Conflict in the Middle East” will be temporarily paused to undergo a thorough vetting and balancing process. A Task Force will be formed to complete this process. This Task Force will ensure that the resources will reflect an approximately 50/50 balance of history, curriculum, visual arts and film materials representing both the Palestinian and Jewish/Israeli perspectives. This process does not preclude the inclusion of neutral resources.

All existing and newly added materials will be meticulously reviewed to ensure they do not promote hate against a protected class or deny the self-determination of any protected class. Any materials found to contain such content will not be included.

Before the webpage is reinstated, the Task Force will present to the Board a summary detailing:

- The type and number of resources representing each perspective.
- The vetting process used for each resource.

This approach ensures transparency, equity, and a commitment to balanced and inclusive educational materials.

**RATIONALE:**

**COST ESTIMATE:**

---

**STAFF TIME ESTIMATE:**

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**SUBMITTED BY:**

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MTA Board of Directors' Meeting  
**ITEM OF NEW BUSINESS**

Check One:   • Proposed Policy    • Proposed One-Time Action   • Informational Item

---

**MOVED:** The Board of Directors will form a BOD working group appointed by the MTA president to review MTA's Resources on Israel and Occupied Palestine to ensure a fair and impartial presentation of both Palestinian and Israeli perspectives are included in the resources. The resources will be updated based on the working groups's recommendations and will be shared at the June BOD meeting.

**RATIONALE:**

**COST ESTIMATE:**

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**STAFF TIME ESTIMATE:**

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**SUBMITTED BY:**

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