APRIL 26-27, 2024

Mass Mutual Center - Springfield, MA

NBI #01

2024 FORM FOR NEW BUSINESS ITEMS

Task Force to Review The Local Office Support Program 04.13.2024, 10:17 pm

NBI Name Kyle Gekopi			Date and Time Wellesley Educators Association
Delegate Making the Motion Barry Davis	Cell	Email	Association Represented or Retired Haverhill Education Association
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired
According to the MTA Standin	g/Special Rules		

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

I move that the MTA create a task force to review all Policies and procedures associated with the Local Office Support program and recommend amendments to align these policies with the following objectives:

Increase access to Local Office Support funds for all locals to attend MTA Annual Meeting, Training and Professional Learning Conferences, and NEA Events

Support new member outreach,

Expand access to funds for locals engaged in rank-and-file organizing,

Reduce the burden of local bookkeeping and repeated exchange of funds between MTA and local affiliates.

Support ESP leadership development.

The task force will consult with any existing body tasked with policy review before making recommendations for adoption by the delegates of the 2025 MTA Annual Meeting.

SUBMITTER'S RATIONALE:

A task force is needed to review this program to better align MTA financial resources with the MTA blueprint.

DUES IMPACT: \$0.00

SUBMITTER'S COST & STAFF TIME ESTIMATE: \$0, ~30 Hours

MTA COST & STAFF TIME ESTIMATE (For MTA use only):

MTA Cost Estimate: \$0 MTA Staff Time Estimate: 100 hours

NBI #02

2024 FORM FOR NEW BUSINESS ITEMS

Endorse A Plan to Disassociate NEA from Amazon.com 04.13.2024, 10:17 pm

NBI Name Kyle Gekopi			Date and Time Wellesley Educators Association
Delegate Making the Motion Deb Gesualdo	Cell	Email	Association Represented or Retired Malden Education Association
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired
According to the MTA Standin	g/Special Rules	:	

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

The MTA Annual Meeting will endorse the following New Business Item to be presented at the 2024 NEA Representative Assembly:

"In light of Amazon's position that the National Labor Relations Board (NLRB) is unconstitutional, the NEA shall use existing staff and resources to research and design a plan to remove any affiliations and partnerships with Amazon.com, Inc by May 1, 2028. (May Day). This plan will be presented to the 2025 Representative Assembly for adoption as a New Business Item."

As the highest governing body of the MTA, the delegates at the Annual Meeting have the ability to advance business to the NEA. This NBI advances a motion to the NEA in July. Amazon argues that the NLRB structure infringes upon their rights of corporate personhood, paving the way for an eventual supreme court ruling undoing the incredible labor gains over the board's 88 year history. The NEA can't consume the labor movement.

DUES IMPACT: \$0.00

SUBMITTER'S COST & STAFF TIME ESTIMATE: \$0.00, No Time Needed



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MTA COST & STAFF TIME ESTIMATE (For MTA use only):

MTA Cost Estimate: \$0 MTA Staff Time Estimate: 0 hours

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NBI #03

2024 FORM FOR NEW BUSINESS ITEMS

President Biden's Order on Women's Health 04.16.2024 11:24 a.m. NBI Name Date and Time Leonard Paolillo MSCA Delegate Making the Motion Cell Fmail Association Represented or Retired Tim Sheehan Amherst-Pelham Delegate Seconding the Motion Cell Email Association Represented or Retired According to the MTA Standing/Special Rules:

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

Utilizing existing publications, the MTA shall publicize the Executive Order on Advancing Women's Health Research and Innovation, which was promulgated by President Joe Biden on March 18, 2024. The discussion of the order should include, but not be limited to: a) the Biden administration's desire to advance women's health research, close health disparities, and ensure that the gains made in research are translated into real world clinical benefits for women; b) its policy to ensure that women have access to high-quality, evidence – based healthcare and to improve health outcomes for women across their lifespans; c) its policy to develop new comprehensive resources to help ensure that women have evidence – based information about menopause, including menopause – related research initiatives, findings, and symptom – prevention and treatment options; d) its policy to involve the Secretary of Defense and the Secretary of Veteran Affairs in evaluating the needs of women service members and veterans related to midlife health. In addition, the MTA President and board members in their communications will encourage our members to let their families and friends know about this comprehensive executive order and that President Joe Biden has demonstrated his commitment to advancing women's health care. Also, the MTA through a new NEA business Item will urge the NEA to similarly publicize the executive order.

SUBMITTER'S RATIONALE:

With the upcoming Presidential election, it is imperative that our members and the public know of an important accomplishment of President Biden.



DUES IMPACT: \$0.00

SUBMITTER'S COST & STAFF TIME ESTIMATE: \$200 - \$300, 2-3 Hours

MTA COST & STAFF TIME ESTIMATE (For MTA use only):

MTA Cost Estimate: \$0 MTA Staff Time Estimate: 20 hours

NBI #04

2024 FORM FOR NEW BUSINESS ITEMS

Encouraging districts to apply for IRA funds for greener schools

Encouraging districts to apply for the funds for greener schools			04.10.2024, 1.23 FW	
NBI Name			Date and Time	
Ferd Wulkan			Retired	
Delegate Making the Motion Michael Kozuch	Cell	Email	Association Represented or Retired Newton Teachers Association	
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired	
According to the MTA Standin	g/Special Rules	:		

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

Whereas, Massachusetts has 1,840 schools with 186 million square feet of building area responsible for an estimated 880,000 metric tons of carbon emissions annually, and

Whereas students spend over 15,000 hours inside a school by the time they graduate high school, and

Whereas, schools can fulfill their educational mission only when students and staff are provided with safe and healthful learning environments, and

Whereas, schools are increasingly subject to the impacts of extreme weather events that threaten the well-being of students, families, teachers and staff, and

Whereas, Massachusetts has set ambitious targets for the reduction of greenhouse gasses, and

Whereas, modifications to infrastructure, buildings and vehicles can decrease schools' greenhouse gas emissions, and

Whereas, the MTA belongs to the Climate Resilient Schools Coalition whose focus is to protect students from, and prepare students for, the effects of climate change, and

Whereas, the Inflation Reduction Act has allocated unlimited funds for the next ten years for the installation of ground source heat pumps to heat and cool schools, and

Whereas, the Environmental Protection Agency has allocated large sums of money for the transition from diesel to electric school buses,



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Therefore be it resolved that the MTA will disseminate to all members, committees and local presidents easily understood and easily used resources to encourage school districts to apply for these funds, and

Therefore be it further resolved that MTA will actively support members organizing in their schools and communities for their districts to apply for these funds and to take other steps to reduce the use of fossil fuels in their schools.

SUBMITTER'S RATIONALE:

DUES IMPACT: \$0

SUBMITTER'S COST & STAFF TIME ESTIMATE:

MTA COST & STAFF TIME ESTIMATE (For MTA use only):

MTA Cost Estimate: \$0 MTA Staff Time Estimate: 100 hours

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2024 FORM FOR NEW BUSINESS ITEMS

Decarbonization Task Force Reauthorization

NBI Name Michael Kozuch			Date and Time Newton Teachers Association
Delegate Making the Motion Craig Slatin	Cell	Email	Association Represented or Retired Retired
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired
According to the MTA Standin	g/Special Rules	:	

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

Whereas, the 2023 MTA Annual Meeting approved a Decarbonization Task Force to move the Massachusetts Teachers Association towards decarbonization by 2030,

and whereas, the Decarbonization Task Force has submitted its report and recommendations to the board and membership which provided a detailed plan with budgetary implications and a timeline,

and whereas, the recommendations are only now starting to be implemented,

and whereas, the Decarbonization Task Force should monitor the implementation of detailed timelines and action steps to help the MTA to achieve carbon neutrality by 2030.

Be it resolved: The MTA, in line with the 2021 Next Generation Roadmap for Massachusetts Climate Policy, and the UN Paris Agreement to keep global temperature rise well below 2 degrees celsius, hereby reauthorizes the Decarbonization Task Force for another year.

SUBMITTER'S RATIONALE:

As countries around the world work to fulfill climate pledges made at the 2015 UN gathering in Paris, fossil fuel projects are abandoned, and investment in renewable energy is growing.

Climate change science is advancing and discovering that several critical models have <u>underestimated</u> the feedback loops inherent with global warming. The polar regions are changing in ways that are increasing warming trends and will lead to much higher sea level rise in some areas, especially in the U.S. eastern seaboard. As an association of educators, our actions must demonstrate a regard for science-based decision-making that aims to mitigate and prevent the

NBI #05



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04.16.2024, 1:23 PM

worst scenarios of catastrophic climate change predicted to occur by the end of the 21st century. We hold this responsibility for our members, our students, their families, and their communities, and the Commonwealth.

- MTA has long advocated for social justice and protection of health, safety, and the natural environment. MTA Resolution B-11 puts us on record in advocating that the Commonwealth adopt measures to reduce dependence on fossil fuels and actively pursue and promote the use of alternative energy resources. As MTA urges the adoption of alternative energy resources in the Commonwealth, it must clean up its own operations.
- By helping to implement MTA's goal of 2030 carbon neutrality, reauthorizing the task force will serve our students and our communities by protecting their future. And we will show that we stand by our statements and walk the talk. We will truly be doing well by doing good.

DUES IMPACT: None

SUBMITTER'S COST & STAFF TIME ESTIMATE: \$0 and 72 hours of staff time.

MTA COST & STAFF TIME ESTIMATE (For MTA use only):

MTA Cost Estimate: \$0 MTA Staff Time Estimate: 100 hours **NBI #06**

Refocus MTA on Education in Massachusetts			04.16.2024, 1:53 pm
NBI Name Dori Fishbone			Date and Time Lincoln Educators Association
Delegate Making the Motion Colette Kuchel	Cell	Email	Association Represented or Retired Lincoln Educators Association
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired
According to the MTA Standing/Special Rules: With the exception of items on the agenda, all substantive motions shall be			all be submitted in writing to the Presiding Officer.

MOTION

MOVED:

The MTA Board of Directors shall not take positions on matters of international conflict. The MTA will keep our focus on our core mission which is to work collectively with all our members to defend their rights and responsibilities in our collective agreements and to uphold the laws in Massachusetts General Law 150E.

SUBMITTER'S RATIONALE:

The MTA's core mission is to work collectively with all our members to defend their rights and responsibilities in our collective bargaining agreements and to uphold the laws in Massachusetts General Law 150e. The MTA should refrain from commenting and taking sides in geopolitical conflicts that are divisive to its members. Instead, the MTA should focus on wages, class sizes, safe schools, health and safety, and student and teacher mental health. Taking positions on

international conflicts will risk alienating students and faculty and could lead to creating a hostile learning and work environment. When the MTA weighs in on contentious international conflicts, it undermines their standing as a professional union for all members. Since the executive board is not elected on their expertise in international policy, they do not have the qualifications to represent the membership in complex issues of international law and diplomacy. It would be impractical to educate all of MTA's members sufficiently to obtain an adequate mandate to establish an MTA position on every international conflict.

DUES IMPACT: \$0



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MTA COST & STAFF TIME ESTIMATE (For MTA use only): MTA Cost Estimate: \$0 MTA Staff Time Estimate: 0 hours

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NBI #07

2024 FORM FOR NEW BUSINESS ITEMS

Publicizing Beyond Thoughts and Prayers

NBI Name			Date and Time
Leonard Paolillo			MSCA
Delegate Making the Motion Tim Sheehan	Cell	Email	Association Represented or Retired Amherst-Pelham
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired

According to the MTA Standing/Special Rules:

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

The MTA shall publicize the gun reform efforts of the Beyond Thoughts and Prayers PAC which was launched by Representative Jake Auchincloss of Massachusetts 4th District with the assistance of Representative Luch McBath of Georgia 7th district. The coverage should include but not be limited to: a) the PAC targeting districts with Republican representatives that voted for President Joe Biden in 2020 and other districts nationwide with polling that favors gun safety legislation in order to elect pro gun safety legislators b) the PAC supporting those candidates who will support 1) the Assault Weapons Band Act, 2) Equal Access to Justice for Victims of Gun Violence Act, and 3) Ethan's Law (requiring safe gun storage, named after a Connecticut child who was killed by an unsecured gun); c) the story behind Representative Luch McBath becoming a renowned gun safety advocate. In addition, the President and Board of Directors will encourage our members to let others know about the efforts of the Beyond Thoughts and Prayers PAC.

SUBMITTER'S RATIONALE:

In order to enact needed gun safety legislation, we need representatives in Congress who will make it a priority to pass legislation that will make our schools and communities safer.

DUES IMPACT: \$0.00



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04.16.2024, 9:21 pm

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MTA COST & STAFF TIME ESTIMATE (For MTA use only): MTA Cost Estimate: \$0 MTA Staff Time Estimate: 50 hours

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NBI #08

2024 FORM FOR NEW BUSINESS ITEMS

Stop development of framework			04.17.2024, 1:46 pm
NBI Name Karen Burstein			Date and Time Bedford Education Association
Delegate Making the Motion Elizabeth Goldberg	Cell	Email	Association Represented or Retired Norwood Teachers Association
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired
According to the MTA Standing With the exception of items of	<i>"</i>		shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

The MTA will not create a framework for discussing and set of curriculum resources for learning about the history and current events on the Israeli-Palestinian conflict for educational use.

SUBMITTER'S RATIONALE:

On December 9, 2023, without polling or notifying any of its 117,000 members, the MTA Board of Directors passed the following motion: "The Training and Professional Learning Division will develop a framework for discussing and set of curriculum resources for learning about the history and current events in Israel and Occupied Palestine, for MTA members to use with each other and their students."

The Israeli-Palestinian conflict is complex for several reasons, each contributing to its prolonged and often volatile nature, necessitating expert analysis to understand its nuances. The conflict has deep historical roots. Experts in history, politics, human rights, and international law are needed to interpret and unpack these layers and provide context. Understanding the social and cultural implications requires expertise in anthropology, sociology, and cultural studies. Experts may hold differing views and analyses of the conflict, reflecting the diverse and complex nature of the issue itself.

Investing the MTA's staff time and money into developing a curriculum is not the best use of our limited resources.







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One element of the MTA's strategic action plan is "Ensuring through continuous input and advocacy that all policies and regulations regarding education policy and practice reflect the perspective and expertise of experienced practitioners." The mission of the plan states that, "Great unions have been and will continue to be constructed on a number of central principles and practices. Such tenets form the foundation of this Strategic Action Plan, which is designed to help the MTA work with its locals and chapters as they build the vision, the structures and the broad base of involvement that our members and our students need and deserve." The MTA should stay focused on issues that directly impact MTA members such as hours, wages, fair contracts, and working conditions. If such far-reaching decisions and dialogue are to take place, every effort should be made to include input from all members and information should be disseminated appropriately prior to such actions.

DUES IMPACT: \$0.00

SUBMITTER'S COST & STAFF TIME ESTIMATE: \$0.00

MTA COST & STAFF TIME ESTIMATE (For MTA use only): MTA Cost Estimate: \$0 MTA Staff Time Estimate: 0 hours

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NBI# 09

2024 FORM FOR NEW BUSINESS ITEMS

<u>Written Policy on MTA's Invo</u> NBI Name Brett Berkman	lvement ir	1 International Affairs	04.20.2024 3:05 pm Date and Time Framingham
Delegate Making the Motion Sarah Guernsey	Cell	Email	Association Represented or Retired Framingham
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired
According to the MTA Standin	g/Special Rule	s:	

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

The MTA will create a task force to create a union policy regarding not taking positions on international conflict. This written policy will be an important step in keeping our focus on our core mission which is to work collectively with all our members to defend their rights and responsibilities in our collective agreements and to uphold the laws in Massachusetts General Law 150E.

SUBMITTER'S RATIONALE:

The MTA's core mission is to work collectively with all our members to defend their rights and responsibilities in our collective bargaining agreements and to uphold the laws in Massachusetts General Law 150e. The MTA should refrain from commenting and taking sides in geopolitical conflicts that are divisive to its members. A written policy will guide the MTA's decision making around geopolitical conflicts in years to come. It will remind the MTA leadership, executive board, board of directors, and members at large that taking positions on international conflicts will risk alienating sides and could lead to creating a hostile learning and work environment. The policy will explain how when the MTA weighs in on contentious international conflicts, it undermines its standing as a professional union for all members. The task force will outline that since the executive board is not elected on their expertise in international policy, they do not have the qualifications to represent the membership in complex issues of international law and diplomacy. Furthermore, it would be very costly to train and educate all MTA members sufficiently in order to have them make statements on every international conflict. This increase in training and education cost would need to be budgeted by either increasing dues or taking money away from some of the other important MTA work

DUES IMPACT: \$0

SUBMITTER'S COST & STAFF TIME ESTIMATE:

MTA COST & STAFF TIME ESTIMATE (For MTA use only):MTA Cost Estimate:\$0MTA Staff Time Estimate:30 hours

ANNUAL MEETING OF DELEGATES APRIL 26-27, 2024 Mass Mutual Center - Springfield, MA

2024 FORM FOR NEW BUSINESS ITEMS

Operations & Facilities Review			04.21.2024 6:52 a.m.	
NBI Name MTA			Date and Time	
John Sullivan			Belmont Education Association	
Delegate Making the Motion	Cell	Email	Association Represented or Retired	
Kerry Costello			Andover Education Association	
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired	

According to the MTA Standing/Special Rules:

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED: That MTA's Executive Director-Treasurer review MTA operations and facilities to make recommendations to the Executive Committee about how to improve support of local affiliates' ability to organize and represent members before the development of the 2025 Budget. This review shall include data on the effectiveness of the additional new hires for the current fiscal year and any additional new hires for the prospective membership year as of December 31, 2024.

SUBMITTER'S RATIONALE: The proposed MTA Budget has recommended dues increases significantly above a COLA increase in the last two years which expands the number of MTA employees. There has been no comprehensive study to justify this approach. The cost of each employee is budgeted at approximately \$230,00. Over the same time, affiliate locals have reported the need for support from their Field Representative/Organizers and an increased response time from MTA departments. All 400+ locals need support for democratic unionism to improve working conditions and organize to win fights around what members care about. Our members deserve and expect us to be good stewards of their dues dollars. Before asking for more money from members, we need to improve our responsiveness and ensure our facilities meet the needs of members and employees.

DUES IMPACT: \$0

SUBMITTER'S COST & STAFF TIME ESTIMATE:

MTA COST & STAFF TIME ESTIMATE (For MTA use only): MTA Cost Estimate: \$0 MTA Staff Time Estimate: Ongoing work that is a normal part of budget development.



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ANNUAL MEETING OF DELEGATES

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2024 FORM FOR NEW BUSINESS ITEMS

MTA COMMITMENT TO LC	04.22.2024 7:46AM		
NBI Name Lamikco Magee			Date and Time APEA
Delegate Making the MoMon	Cell	Email	Association Represented or Retired
Georgia Malcolm			APEA
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired
According to the MTA Standing	<i>"</i>		

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

Locals must have 80% or more membership in each unit to pay more than \$3 each year in dues increases.

SUBMITTER'S RATIONALE:

The MTA must work harder to help locals keep members and this is an incentive if they want more in dues. Members must see the value of affiliation with the MTA. Although local executive boards work really hard on membership, most have full time jobs. Some of our units are near 50% and may be decertified while MTA is asking members to pay more and more in dues every year. Members don't see the value. Locals should not have to eat the cost of the dues increase to keep membership affordable to lower paid units.

DUES IMPACT:

SUBMITTER'S COST & STAFF TIME ESTIMATE:

MTA COST & STAFF TIME ESTIMATE (For MTA use only): MTA Cost Estimate: MTA Staff Time Estimate:

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NBI #12

2024 FORM FOR NEW BUSINESS ITEMS

Changing the Funding Process for Public Sector Union Contracts 04.22.2024 11:18 a.m. NBI Name Date and Time Susan McNeil Association of Professional Administrators (APA) **Delegate Making the Motion** Cell Email Association Represented or Retired **Claudine Barnes** Massachusetts Community College Council Delegate Seconding the Motion Cell Email Association Represented or Retired According to the MTA Standing/Special Rules: With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

MTA shall work in coalition to change the way state public sector union contracts are funded, so that negotiated contracts ratified by public sector unions shall be funded expeditiously, and shall continue working on this until a solution is found and implemented.

SUBMITTER'S RATIONALE:

The current manner of contract funding as mandated by MGL 150e is unnecessarily burdensome and causes systemic delays in the funding of negotiated contracts. Under the current system, once a contract is ratified it has to be approved by the Office of Administration and Finance and then sent to the Governor to approve to be sent to the Legislature for funding.

This process is unnecessary because the Governor sets the financial parameters and all public sector unions are required to accept the same terms. Once the parameters are set the money is set aside in the budget in a fund controlled by A&F. Once a contract is negotiated and duly ratified, the appropriation request should go directly to the Legislature for a vote.

Under the current system, a regular 75-day delay in funding a ratified contract is built into the process. As a result, one MTA higher ed local unit recently had to wait nearly 11 months from ratification until payment, and the vast majority of all public higher education union contracts have been delayed longer than 90 days before they were funded.

DUES IMPACT: \$0

SUBMITTER'S COST & STAFF TIME ESTIMATE:

It is hard to estimate the cost of this endeavor, but we hope that MTAs continued work with AFL-CIO Public Sector Taskforce would bring together all stakeholders affected to work towards this valuable and important change and that they will be willing and able to share in costs as well as work hours until a solution is found and implemented. MTA COST & STAFF TIME ESTIMATE (For MTA use only):MTA Cost Estimate:\$0MTA Staff Time Estimate:ongoing work

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NBI# 13

2024 FORM FOR NEW BUSINESS ITEMS

Health and Safety Protections for Educators <u>NBI Name</u> Eric Simard			4/22/24, 3:34 PM Date and Time Pathfinder Education Association
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired
According to the MTA Standing/Special Rules:			

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

We motion that the MTA allocates resources to lobby state officials to create a CMR change to 454 CMR 25.02, .05, and .06. This would expand protections for educators beyond the scope of severe injury to include non-physical harassment (which may be currently excluded), and to expand notification to the complainant.

SUBMITTER'S RATIONALE:

In its current form, the CMR seems to only refer to serious injury and illness, seemingly ignoring social emotional trauma of non-physical assault that many members are forced to endure. Furthermore, the weak reporting language seems to allow Districts to hide, mask, or delay releasing citations and findings to employees. (See attachment for actual red-line proposal of change.)

DUES IMPACT: \$0

SUBMITTER'S COST & STAFF TIME ESTIMATE: \$100,000

MTA COST & STAFF TIME ESTIMATE (For MTA use only):MTA Cost Estimate:\$0MTA Staff Time Estimate:400 hours

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2024 FORM FOR NEW BUSINESS ITEMS

NBI NamePension Reform Faceb	ook Group		04.22.2024 3:37 PM
Date and Time Matthew Scheffler			Framingham Teachers Assoc.
Delegate Making the Motion	Cell	Email	Association Represented or Retired
Christine Mulroney			Framingham Teachers Assoc.
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired

According to the MTA Standing/Special Rules:

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED: This motion is submitted on behalf of the newborn daughter of Sungida Rashid, a new mother we lost in Boston because our hospitals were plundered by Private Equity investments from teacher pensions. (Boston Globe: <u>Steward's medical devices were repossessed. Weeks later, a new mother died.</u>) This is the true cost of Private Equity and our Pension.

I move MTA to create, endorse, and support a Pension Reform Facebook Group (Where's Our 11?) to inform, organize, and mobilize MTA members to take action and address the abusive investments and mismanagement of the PRIT fund by Mass PRIM, MTRS, and their private fund managers.

This is to be done in consultation with the Minnesota Pension Reform Group (20k members),
Ohio Retired Teacher Association Facebook Group (18k members), and Benchmark Financial
Services (a Leading Pension Advocacy Organization)

Fact:

MTRS is one of the <u>worst-funded and managed pensions in the nation</u>, with a ranking of <u>29th out of 30 to</u> <u>comparable public pensions</u>. This is the result of 40+ years of management by Mass PRIM. We are <u>subsidizing</u> the failed investments and management of Wall Street fund managers with our 11% and

<u>State Funding</u>, at the cost of school budget shortfalls, cuts, and COLA adjustments that fall well below inflation.

We also have one of the highest exposure to private markets and valuation risk, which has suffered the worst financial collapse since 2008 these past two years.

The Pension Gamble (full documentary) | FRONTLINE



Impact:

Boston Globe: "Sungida Rashid gave birth at St. Elizabeth's Medical Center in October, and barely a day later she was bleeding to death....In the operating room, caregivers had a plan to quickly treat it, but the staff there soon discovered something alarming — the embolism coil that doctors could have used to stop the bleeding wasn't available. Weeks prior, the hospital's inventory of the devices had been repossessed, according to hospital staff. A company rep from the manufacturer explained to staff that Steward Health Care, the parent company for St. Elizabeth's, hadn't paid the bill."

This is the true cost of blindly trusting our 11% to underperforming private fund managers. Enough is enough.

We can no longer afford to be silent.

SUBMITTER'S RATIONALE:

Where's Our 11?

A Window into the True Cost of Private Equity: (Infants) & Private Equity Manager: Apollo

Apollo Management Co. – New York, NY

Fund	Vintage Year	Commitment	Contributed	Distributed	NAV	Net IRR	Net Multiple
Apollo Investment Fund IV, L.P.	1998	50,000,000	51,120,766	84,514,931	26,523	8.5%	1.7x

PESP Report- Profits over Patient

Local Story of PE & Healthcare: <u>Sungida Rashid</u>- New Mother Dead Boston, MA (<u>Steward's medical devices</u> were repossessed. Weeks later, a new mother died.)



Apollo's Stranglehold on Hospitals Harms Patients and Healthcare Workers Portfolio Companies: LifePoint and ScionHealth Massachusetts Pension Reserves Investment Management Board

True Cost I.	True Cost II.
The Healthcare Divide (full documentary) FRONTLINE	Mother's death sparks concern about hospital investment



DUES IMPACT: \$0

SUBMITTER'S COST & STAFF TIME ESTIMATE:

MTA COST & STAFF TIME ESTIMATE (For MTA use only):MTA Cost Estimate:\$0MTA Staff Time Estimate:400 hours

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04.22.2024 3:37 PM

Mass Mutual Center - Springfield, MA

2024 FORM FOR NEW BUSINESS ITEMS

Public Letter re: Mass PRIM private investments

Matthew Scheffler			Date and Time Framingham Teachers Assoc.
Delegate Making the Motion	Cell	Email	Association Represented or Retired
Christine Mulroney			Framingham Teachers Assoc.
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired

According to the MTA Standing/Special Rules:

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED: This motion is submitted on behalf of the children being harmed by our Private Equity investments. In consultation with the <u>Center of Economic and Policy Research</u>, I move MTA to write an informed public letter to all appropriate State and Federal regulatory agencies and authorities: PERAC, MA State SEC, Legislators, Governor, State Treasurer, Attorney General, the SEC, and federal delegations. calling for an investigation and public hearings into the inconsistencies of Non-GAAP accounting practices and performance reporting of Mass PRIM's private investments (i.e., all close-end alternative funds) and the systemic risks they pose to our pension as warned by federal and global regulators in the last 6 months. (<u>SEC- Red Alert; IOSCO; FSOC</u>)

Fact:

<u>Equable Pension Research Group</u>: <u>ranked Massachusetts 41st out of 51</u> with among the highest exposure to valuation risk due to <u>40% asset allocation to private markets</u>.

Michael Trotsky, Mass PRIM CIO, has acted as spokesperson for Private Equity's largest lobbying group, the <u>American Investment Council</u>, and personally benefits from the <u>inflated accounting practices</u> of our private fund managers(<u>The state's highest-paid quasipublic official</u>). He is a <u>persistent purveyor of the lie and myth</u> that the <u>IRRs of our Private Equity</u> funds are realized. Since Inception 25+ years ago, Mass PRIM's PE investments have not realized a positive cash-on-cash return to total commitments, costing our pension system billions in <u>lost market value</u>.

Impact:

In 2016, Mass PRIM committed a \$225 million commitment. Blackstone would soon take ownership of several private companies, including <u>Packer's Sanitation</u> and <u>Center of Autism and Related Disorders</u> (<u>CARDS</u>) at grave costs.

<u>Blackstone-Backed Slaughterhouse Cleaner Embroiled in Child-Labor Scandal - Bloomberg</u>: "Packers had the 14th-highest number of <u>severe injuries</u>—defined as an amputation, hospitalization, or the loss of an eye— among the 14,000 companies tracked by OSHA in 29 states.....Labor Department <u>said</u> it found that PSSI violated federal law by employing minors in hazardous jobs, including cleaning dangerous power equipment. It said several, including a 13-year-old, suffered chemical burns and other injuries."

We can no longer afford to be silent.

SUBMITTER'S RATIONALE:

Where's Our 11?:

A Window into the True Cost of Private Equity (Children) & Mass PRIM, PE Manager: Blackstone Blackstone Capital Partners – New York, NY

Fund	Vintage Year	Commitment	Contributed	Distributed	NAV	Net IRR	Net Multiple
Blackstone Capital Partners IV, L.P.	2003	75,000,000	87,464,449	212,571,091	268,045	36.3%	2.4x
Blackstone Capital Partners V, L.P.	2006	125,000,000	131,329,992	214,765,745	55,740	7.6%	1.6x
Blackstone Capital Partners VI, L.P.	2011	100,000,000	109,001,079	159,519,195	35,372,259	12.4%	1.8x
Blackstone Capital Partners VII, L.P.	2016	225,000,000	240,647,299	154,584,817	223,548,650	13.7%	1.6x
Blackstone Capital Partners VIII, L.P.	2020	250,000,000	165,313,798	10,338,068	180,583,858	11.8%	1.2x

PESP Report- Child Abuse

Portfolio Company #1: <u>Packer's Sanitation</u> Portfolio Company #2: <u>Center of Autism and Related Disorders (CARDS)</u> Blackstone Capital Partners, 2016- <u>Blackstone</u> & Exploiting <u>Child Labor</u> & <u>Children with Autism</u>



Images released by the US labor department show children working illegally for PSSI. Photograph: US Department of Labor



The Myth of Private Equity | Jeffrey C. Hooke | Talks at Google



Portfolio Company #1: Packer's Sanitation

In February 2023, the U.S. Department of Labor charged Packers Sanitation with employing 102 children to clean slaughterhouses. (Alone and Exploited, Migrant Children Work Brutal Jobs Across the U.S. - The New York Times) Since this story broke, Packers Sanitation has collapsed to the verge of bankruptcy as major clients cut ties over the scandal (Blackstone-Backed Slaughterhouse Cleaner Embroiled in Child-Labor Scandal - Bloomberg & Fitch Revises Packers' Outlook to Negative; Affirms IDR at 'B-')

Portfolio Company #2: Center of Autism and Related Disorders (CARDS)

In 2018, Blackstone used our money to buy a chain of autism treatment centers, the Center of Autism and Related Disorders (CARD) for \$600 million. Blackstone implemented a cookie-cutter treatment template and standardized therapeutic plans in the name of cost-cutting & profiteering, resulting in reports of severe physical abuse to children and billing fraud. (Parents and clinicians say private equity's profit fixation is short-changing kids with autism; Private equity is the biggest player in the autism-therapy industry, and some say that's hurting the quality of care | Fortune & Audit of Medicaid Applied Behavior Analysis for Children Diagnosed With Autism)

Blackstone has since declared bankruptcy and sold CARD back to its original owner for \$48.5 million (Autism treatment center gets US bankruptcy court approval for \$48.5 million sale | Reuters &. This Psychologist Got Rich Selling Her Chain Of Autism Treatment Centers. Now She's Trying To Buy It Back) It has been 8 years since we committed \$225 million in Fund VII, to which Blackstone has only returned \$155 million in distributions. Private Equity Disclosure Report - 06.30.23.xlsx

DUES IMPACT: \$0

SUBMITTER'S COST & STAFF TIME ESTIMATE:

MTA COST & STAFF TIME ESTIMATE (For MTA use only):MTA Cost Estimate:\$0MTA Staff Time Estimate:10 hours

Mass Mutual Center - Springfield, MA

2024 FORM FOR NEW BUSINESS ITEMS

MTA Organize an Annual Labor Conference of Pensions			04.22.2024 3:37 PM			
Matthew Scheffler			Date and Time Framingham Teachers Assoc.			
Delegate Making the Motion	Cell	Email	Association Represented or Retired			
Christine Mulroney			Framingham Teachers Assoc.			
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired			

According to the MTA Standing/Special Rules:

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED: This motion is submitted on behalf of troubled teenagers and at-risk youth who have been harmed or lost their lives due to the criminal negligence and management of private equity fund managers, such as Bain Capital and Centerbridge Capital

I move the MTA to organize an annual Labor Conference of Pensions (LCOP) in collaboration with all willing Sibling Unions in Massachusetts who are invested in or impacted by Mass PRIM and their Private Funds. The mission of this conference is to demand financial science, not marketing, guide the management of the PRIT fund, and raise awareness of the true cost and societal impact of our pension investments. It is an open secret that Wall Street views public pensions as <u>"dumb money"</u>. It's time we change that.

This conference will host a council of experts: academics, journalists, regulators, state and federal delegates, advocacy groups, and pension specialists from NEA, AFT, SEIU, Public Safety Unions, Teamsters, and United Auto Workers to offer their insight and provide a forum of direct communication between independent experts and pension beneficiaries. This forum will also provide all current Mass PRIM board members with access to independent, evidence-based research and information about Private Funds. This conference will publish a report compiling and highlighting the research findings from the council of experts, which will be distributed to the media, state & federal regulators, and pension board members & fund managers.

Fact:

These private funds and investments were deemed illegal until the <u>National Securities Market Improvement</u> <u>Act of 1996</u> because of their <u>history of abuse</u>, <u>mismanagement</u>, <u>and criminal enterprises</u>. We've never paid and sacrificed more into the PRIT fund, yet MA teachers still have one of the worst-funded pensions in the country. This is because Mass PRIM & MTRS has subsidized Wall Street's underperformance and bonuses with our 11% and state funding, while causing immeasurable societal harm for decades. The deregulation of State Pensions in 1996 is eerily similar to the deregulation of the Savings and Loan Banks by Wall Street in the 1980s. This gave rise to the opaque investment world of leveraged-buy-outs and corruption of regulatory oversight that would ultimately bankrupt over a thousand S&Ls between 1986 and 1995. Unfortunately, it seems the <u>S&L Crisis</u>, the arrest of Michael Milken, and the collapse of Drexel Burnham Lambert was only the beginning of this story. Leon Black, Michael Milken's lieutenant at Drexel and disgraced <u>financier behind Jeffery Epstein</u> would start Apollo, from Drexel's ashes and lobby <u>Congress to</u> <u>deregulate state pension funds</u> as they did with S&Ls to fund the next era of LBOs under their new gilded name: Private Equity.

History of Deregulations:

- A. 1980s | S&L Banks: <u>Michael Milken (Drexel Burnham Lambert</u>)-> <u>Depository Institutions</u> <u>Deregulation and Monetary Control Act 1980</u>
- B. 2000s | <u>Pensions</u>: <u>Leon Black</u> (Apollo) -> <u>National Securities Market Improvement Act</u> <u>1996</u>
- C. 2023: Private Equity Returns Plunge to Global Financial Crisis Levels Bloomberg

Impact:

Last year, the <u>118th Congress (2023-2024) introduced Stop Institutional Child Abuse Act</u>. This is in response to the extensive reports, findings, and evidence of abuse, neglect, and even death of our most vulnerable teenagers and children under the care our private fund managers: Bain Capital and Centerbridge Capital Partners and their portfolio companies.

A 2017 congressional report investigated the criminal harm and deaths our private equity fund managers were inflicted by our private fund manager Centerbridge Capital's portfolio company: Mentor Network They found "86 children died nationwide while in the company's care over a decade with 62 of those deaths categorized as "unexpected". (25 Investigates: State pays millions to foster care company with history of problems)

No longer can we afford to be silent

SUBMITTER'S RATIONALE:

Where's Our 11?:

A Window into the True Cost of Private Equity (Teenagers) & Mass PRIM, PE Managers: Bain Capital – Boston, MA Centerbridge Capital – NY

						•	
Fund	Vintage Year	Commitment	Contributed	Distributed	NAV	Net IRR	Net Multiple
Bain Capital Fund X, L.P.	2008	125,000,000	131,670,833	*	*	*	*
Centerbridge Capital Partners II, L.P.	2011	150,000,000	230,984,511	171,090,827	16,714,465	(7.3%)	0.8x
Centerbridge Capital Partners III, L.P.	2015	175,000,000	230,736,334	218,936,796	169,950,461	18.0%	1.7x
Centerbridge Capital Partners, LP	2007	50,000,000	78,776,126	138,754,063	1,988,596	19.2%	1.8x

PESP Reports: Troubled Youth

<u>The Kids Are Not Alright: How Private Equity Profits Off of Behavioral Health Services for Vulnerable and</u> At-Risk Youth

Portfolio Company #1: <u>Aspen Educational Group</u>

Portfolio Company #2: <u>Mentor Network (since rebranded Sevita Health)</u>





DUES IMPACT: \$0.50

SUBMITTER'S COST & STAFF TIME ESTIMATE:

MTA COST & STAFF TIME ESTIMATE (For MTA use only):MTA Cost Estimate:\$50,000MTA Staff Time Estimate:500 hours





2024 FORM FOR NEW BUSINESS ITEMS

MTA will organize an open meeting 2 weeks prior to Mass PRIM's quarterly meetings 04.22.2024 3:37 PM

Matthew Scheffler			Date and Time Framingham Teachers Assoc.
Delegate Making the Motion	Cell	Email	Association Represented or Retired
Christine Mulroney			Framingham Teachers Assoc.
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired

According to the MTA Standing/Special Rules:

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

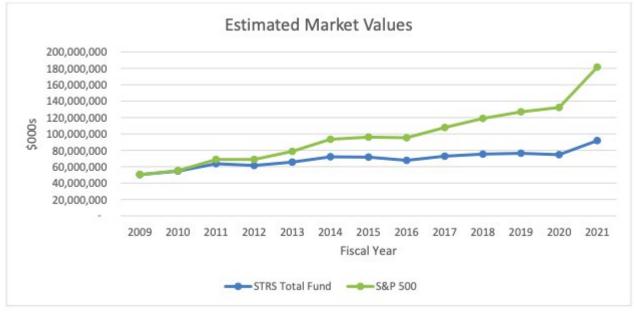
This motion is submitted on behalf of adult prisoners being exploited, abused, and killed by our private equity investments.

I move MTA to take the following actions to ensure equitable access and representation of MTA members at Mass PRIM meetings.

- 1. The MTA will record and save all public Mass PRIM meetings to allow access to all members of the MTA.
- II. The MTA, in coordination with the Private Equity Stakeholder Project, will write a public letter requesting Mass PRIM to allow time for public comment at all public meetings, as is standard practice in Massachusetts. Until such time, MTA will organize an open meeting for all Mass PRIM board representatives and MTA members two weeks prior to Mass PRIM's quarterly meetings to allow for comments and concerns from MTA members to be heard and then expected to be represented by our PRIM board members at Mass PRIM's next meeting. This meeting may also be used as a forum to organize a media strategy authoring editorials and opinion pieces about our concerns to local and national media organizations.

Fact:

Ohio's 2022 Special Audit Report found that Ohio Teachers' Retirement System (a close peer retirement system) would have had \$180 billion in market value, as opposed to the \$95 billion they have today, had they not invested in high-cost, under-performing private investments. We are subsidizing at the cost of

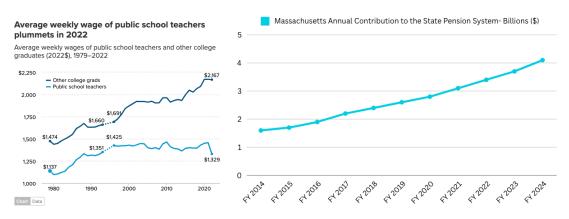


billions the failed investments of private fund managers causing tremendous societal harm.

STATE TEACHERS RETIREMENT SYSTEM OF OHIO FRANKLIN COUNTY SPECIAL AUDIT

The American Federation of Teachers has been raising the alarm about the true cost of private fund managers and public pensions for more than a decade from Hedge Funds in 2015: All That Glitters Is Not Gold: An Analysis of U.S. Public Pension Investments in Hedge Funds to Private Equity in 2017: <u>HOW MONEY MANAGERS' FEES CRUSH STATE BUDGETS AND WORKERS' RETIREMENT HOPES</u> and again in 2021: <u>Lifting the Curtain on Private Equity: A Guide for Institutional Investors and Policymakers</u>. Deeds, not words are needed from MTA to safeguard our pension!

For MTA local affiliates negotiating contracts this year, as we are in Framingham. There's a reason why school districts and the state are crying especially poor this year as they pressure us yet again to accept pay below our worth and COLA adjustments that even keep with inflation. To fully fund our pension, the State needs to supplement our annual contributions by millions each year to subsidize the underperformance and unsound management of our <u>pension</u> by Mass PRIM. MTRS is ranked the most at-risk retirement system in the state according to a recent <u>analysis by S&P</u>. State Funding should go to education, not subsidies for the failed investments of Wall Street fund managers plundering our pension.



Impact:

With private equity investments into prisons from our pension, Mass PRIM & their Private Fund Managers have proceeded to:

1. Plunder Prison Phone Calls: We are price-gouging families, friends, and 2.7 million American children who have at least one parent in prison because they want to call a loved one. <u>Programs</u>

for Incarcerated Parents Preliminary Findings from a Pilot Survey (2022) | National Institute of Corrections | Prison Phones and Private Equity Profits

- Prison Starvation: We are starving prisoners with unedible food that has been served with maggots and then forcing them to survive by buying food from the commissary sold at monopoly pricing. <u>Arizona Prison Food Was Labeled 'Not for Human Consumption,' Ex-Inmates Say | More</u> <u>Maggots and Mold Found in Michigan's Prison Food | Detroit Prisoners Like Me Are Being Held</u> <u>Hostage to Price Hikes - The New York Times</u>
- Healthcare: We are also profiting from denying life-saving health services to prisoners and pocketing the savings to give to our retirees. <u>The Jail Health-Care Crisis | The New Yorker | Private</u> <u>Equity's Grip on Jail Health Care - The Atlantic | CNN investigation exposes preventable deaths</u> and dangerous care that government agencies have failed to stop

No longer can we afford to be silent!

SUBMITTER'S RATIONALE:

Where's Our 11?: A Window into the True Cost of Private Equity

(Adults) & Private Equity Manager: American Securities & H.I.G. Capital							
Fund	Vintage Year	Commitment	Contributed	Distributed	NAV	Net IRR	Net Multiple
American Securities Partners V, L.P.	2008	75,000,000	82,515,475	152,659,637	92,951	20.2%	1.9x
American Securities Partners VI, L.P.	2011	150,000,000	167,919,754	294,102,969	89,874,763	21.6%	2.3x
American Securities Partners VII, L.P.	2016	175,000,000	171,423,258	92,003,198	232,855,850	15.2%	1.9x
American Securities Partners VIII, L.P.	2019	150,000,000	133,929,379	10,429,031	188,148,932	21.9%	1.5x
H.I.G. Bayside Debt & LBO Fund II, L.P.	2008	75,000,000	75,984,551	125,946,811	*	13.7%	*
H.I.G. Capital Partners V, L.P.	2013	30,000,000	31,006,581	46,723,437	*	23.3%	*
H.I.G. Europe Capital Partners II, L.P.	2014	23,025,717	21,502,409	16,995,649	*	12.1%	*
H.I.G. Middle Market LBO Fund II, L.P.	2014	50,000,000	47,615,987	71,652,806	*	27.9%	*

PESP Reports: Prisons

Report: American Securities' Big Bet on Prison Phone Calls Privatized prison healthcare seeks profit at patients' expense Portfolio Company #1: Global Tel Link (GTL) American Securities Portfolio Company #2:Wellpath HIG



been accused of contributing to more than 70 deaths. (CNN photo illustration: Family photos/Law enforcement agencies)

<u>The Perils of Private Prison Health Care | Full</u> <u>Documentary</u> <u>New Ways Private Prisons Are Making Billions | System</u> Academic Research & Gov't Reports Prison Health Care: Costs and Quality



DUES IMPACT: \$0

SUBMITTER'S COST & STAFF TIME ESTIMATE:

MTA COST & STAFF TIME ESTIMATE (For MTA use only):MTA Cost Estimate:\$0MTA Staff Time Estimate:100 hours

NBI #18

Matthew Scheffler

Christine Mulroney

Delegate Making the Motion



Framingham Teachers Assoc.

Association Represented or Retired

Delegate Seconding the Motion Cell

According to the MTA Standing/Special Rules:

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

Fmail

MOTION

MOVED:

This motion is submitted on behalf of the elderly who've been abused and killed in portfolio companies owned by our private fund managers with our money. Or, as Senator Warren said bluntly a few weeks ago at the State House, "turning private equity loose in our health care system kills people." (GBH-Warren, Markey knock 'looting' of health care by private equity)

I move MTA to take the following actions to safeguard our pension and address the structural vulnerabilities threatening the PRIT fund due to Mass PRIM's strategic use of third-party investment advisors, all of whom have a history of abuse and mismanagement of other pension systems & institutional investors.

١. NEPC & Capital Market Assumptions: MTA will write a public letter to the State Securities & Exchange Commission calling for a review of NEPC practices and take the appropriate actions to secure an independent capital market assumptions analysis informed with PRIT fund performance data by Dimensional Fund Advisors. NEPC is a registered investment advisor with a history of feeding institutional investments into criminal Ponzi schemes such as Bernie Madoff while failing to disclose conflicts of interest to clients. (Madoff Scandal Casts Light on Investment Advisers- NYT) Currently, they blindly construct Mass PRIM's capital market assumptions without the use of performance data from PRIT funds.

- II. <u>Hamilton Lane Advisors & Performance Reports</u>: MTA will public letter to the State Legislator asking for an independent investigation of Hamilton Lane Advisors reports and take the necessary actions to secure the consultation of Prof. Ludovic Phalippou, a leading academic researcher and expert in PE performance reporting, to independently review Hamilton Lane Advisors reports. Hamilton Lane Advisors was part of an FBI and SEC investigation and then was fired by Pennslyvania School Employee Retirement System (PSERS) in October 2022 for providing false figures to their board and improper "compensation gifts" to their staff. (source: Latest PSERS development: SEC probes big Pa. pension fund, asking about 'compensation and gifts' to staff & Billions gone from state pension funds).
- III. <u>KPMG & Audits:</u> MTA will write a public letter to the Attorney General of Massachusetts, asking the State to join the class-action lawsuit led by the Norwegian Sovereign Wealth Fund against KPMG for their failed audit of Silicon Valley Bank. <u>The World's Biggest Wealth Fund Is Suing Over Silicon Valley Bank's Failure</u> The PCAOB found that <u>KPMG audits had the highest deficiency rating</u> among the 'Big Four' auditors, was the auditor to <u>all three</u> major banks that failed last year, and has had over <u>20+ years of major auditing scandals and failures</u>.
- IV. MTA will initiate a public lobbying campaign to apply Mass Law Chapter 32 Section 23, (5) universally to all investments, not only "South Africa".

SUBMITTER'S RATIONALE:

Wrecks – America | Amanpour and Company

True Cost of PE (Elderly) & Private Equity Manager: KKR and Blackstone Group

PESP Reports: Assisted Living, Hospice & Medicare Fraud

Wall Street's Incursion into the Home Healthcare and Hospice Industries

MONEY FOR NOTHING How private equity has defrauded Medicare, Medicaid, and other government health programs

Portfolio Company #1: <u>Brightspring | KKR</u> Portfolio Company #2: <u>Apria Healthcare | Blackstone</u>



Fact:

There's a reason why the MTRS/PRIT fund is one of the lowest-funded and worst-performing public pensions in the country, with our pension never being more at risk due to private investments. 2023 was a record-breaking year for Private Equity.

- Highest Number of PE-backed Bankruptcies
- Record-breaking PRIT Management Fee- \$192.7 million

2023 realized a record-high number of bankruptcies by Private Equity portfolio companies. (<u>US private equity portfolio</u> <u>company bankruptcies spiked to record high in 2023 | S&P Global Market Intelligence</u>) However, 2024 is on pace to break this record given the recent reporting of <u>Fortune</u> and <u>Bloomberg</u> on the continued collapse of Private Equity, as PE fund managers struggle to distribute capital back to investors.

Industry experts also have warned about the start of a 'mass extinction' event for venture capital (<u>A startup 'mass</u> <u>extinction event' has begun. You can't see it clearly yet, but it's going to be bad.</u>- Business Insider & <u>From Unicorns to</u> <u>Zombies: Tech Start-Ups Run Out of Time and Money</u>- NYT) and the emergence of pyramid schemes in some parts of the private markets (<u>Private equity industry like a Ponzi scheme, says Amundi CIO | Reuters</u>)

Rather than pausing and reevaluating private investments, Mass PRIM earmarked \$3 billion of new commitments to PE in 2023 (<u>Mass PRIM Earmarks Up to \$3 Billion for Private Equity This Year - WSJ</u>) falsely claiming that<u>long-term PE annualized IRRs are realized</u> and that <u>private market valuation risks are a "common myth"</u>. This \$3 billion included committing another \$200 million toward Insight Partners, the same VC behind <u>FTX</u> and <u>WeWork</u>, both went bankrupt last year with FTX collapsing due to fraud, and another \$150 million to American Securities, the firm behind Global Tel Link and Air Methods both recently found guilty of illegal activities with Air Methods declaring bankruptcy (<u>Air Methods Chapter 11 Restructuring Plan Approved</u>). Neither Insights Partner nor American Securities has distributed a positive cash-on-cash 'realized' return (DPI) since inception. <u>Private Equity Disclosure Report - 06.30.23.xlsx</u>

As a reward for their bankruptcy record and the worst-performing year in over a decade (<u>Private equity firms face worst</u> <u>year for exiting investments in a decade</u>- FT), our private fund managers charged us the highest management fee ever charged at \$192.7 million (<u>Private-Equity Professionals Remain Upbeat on Pay Despite Industry Slump - WSJ</u>).

For perspective, Private Equity for the PRIT Fund's cash-on-cash returns (DPI) since inception has still failed to achieve a positive total distribution of capital to total commitments. (<u>Annual Comprehensive Financial Report- 06/30/2023</u> & <u>PENSION RESERVES INVESTMENT MANAGEMENT BOARD FISCAL YEAR 2024 OPERATING BUDGET</u>)

Since inception to June 30, 2023, the PRIT Fund has committed \$32.8 billion to 560 partnerships (383 active) of which \$27.7 billion has been invested. The program has generated \$32.5 billion in distributions. The net IRR

PENSION RESERVES INVESTMENT MANAGEMENT BOARD

	Fiscal Year 2024		ry	
	<u>FY24</u> (bps)#	<u>FY23</u> (bps)#	FY 2024	FY 2023
Investment Management Fees	. ^			
Global Equities	19.5	18.9	75,681,000	78,370,000
Core Fixed Income	6.2	6.3	8,500,000	9,762,000
Value Added Fixed Income	73.4	73.4	50,820,000	50,700,000
Real Estate	44.6	46.7	48,085,000	43,635,000
Timberland	38.6	27.8	11,900,000	8,250,000
Private Equity	113.3	106.4	192,700,000	185,600,000
Portfolio Completion Strategies (PCS)	94.7	107.1	79,694,000	89,018,000
Overlay, Foreign Currency, and Other	31.2	11.5	1,025,000	1,205,000
	47.3	45.3	468,405,000	466,540,000

Impact:

<u>New York Times</u> "In nursing homes, where the firms have been particularly active, private equity ownership is responsible for an estimated — and astounding — <u>20,000 premature deaths</u> over a 12-year period, according to a recent working paper from the <u>National Bureau of Economic Research</u>."

No longer can we afford to be silent!

DUES IMPACT: \$1

SUBMITTER'S COST & STAFF TIME ESTIMATE:

MTA COST & STAFF TIME ESTIMATE (For MTA use only):MTA Cost Estimate:\$100,000MTA Staff Time Estimate:400 hours

2024 FORM FOR NEW BUSINESS ITEMS

Date and Time April 22, 2024 (4:23pm)
Association Represented or Retired w Bedford Educators Association
Association Represented or Retired
Cambridge Education Association

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

The Massachusetts Teachers Association (MTA) shall divest all MTA staff pension funds and other investments from businesses that provide arms or other forms of military assistance to the state of Israel. The MTA shall likewise demand that the Pension Reserves Investment Management (PRIM) Board divest all pension funds from those businesses that provide arms or other forms of military assistance to the state of Israel.

SUBMITTER'S RATIONALE:

In January 2024, The International Court of Justice deemed claims about a Genocide in Gaza to be "plausible," ordering the state of Israel to take "immediate and effective measures" to stop. Divestment from those companies profiting off the sale of weapons Israel uses in Palestine is one means for upholding the ICJ's ruling. In the past six months, over 33 thousand Palestinians (at least 19 thousand women and children) have been killed in Gaza; over 400 people have been murdered in the West Bank; and thousands more are missing and presumed dead under rubble. In addition, 400 schools, 12 universities, and 24 hospitals in Gaza have been destroyed. More than 1 million people in Gaza are at "catastrophe levels of famine" according to a World Food Programme report from March 2024.

Accordingly, no fewer than 28 Palestinian labor unions, including the General Union of Palestinian Teachers, the General Union of Kindergarten Workers, and the Federation of Unions of Palestinian Universities Professors & Employees have issued a call for international trade unionists "To take action against complicit companies involved in implementing Israel's brutal and illegal siege, especially if they have contracts with your institution."



Heeding this urgent call from our international union siblings aligns with the MTA's stated commitment "to human and civil rights and … quality public education in an environment in which lifelong learning and innovation flourish." It also recalls the precedent of the Mass Divest coalition, when the MTA joined with other labor and community groups to successfully pass legislation in 1982 divesting the Commonwealth of Massachusetts from companies that did business in apartheid South Africa.

Successful passage of this motion reasserts the MTA's position within a global labor movement taking material action for sustained peace, which includes (among others): United Auto Workers Locals 551 and 2320, the Stanford Graduate Workers Union (SGWU-UE), Canada's Unions of Public Employees (CUPE) and Postal Workers (CUPW), the UK's General Federation of Trade Unions (GFTU), Brazil's Central Única dos Trabalhadores (CUT), the Central Trade Union Council of India (AICCTU), the Irish Trade Union Congress, and the General Industries Workers Union in South Africa.

DUES IMPACT: \$0.10

SUBMITTER'S COST & STAFF TIME ESTIMATE:

MTA COST & STAFF TIME ESTIMATE (For MTA use only): MTA Cost Estimate: \$10,000 MTA Staff Time Estimate: 20 hours

2024 FORM FOR NEW BUSINESS ITEMS

NBI Name: Defending Academic Freedo	om		Date and Time 4/22/24 4:36 pm
Delegate Making the Motion: Merrie Najimy	Cell:	Email:	Local Association or Retired
Delegate Seconding the Motion Amanda Achin	Cell:	Email:	Local Association or Retired Classified Staff Union, UMass Boston

According to the MTA Standing/Special Rules: With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

There is a nationally coordinated, well-funded and ideologically-driven assault on public education and on educators who teach about oppression and liberation, including ethnic studies, anti-colonial studies, and LGBTQ studies, in preK-12 and higher education. This has led to book banning, dismantling of ethnic studies programs, banning of anti-racism/social justice pedagogy and curriculum, and attacks on educators and students who bring education about Palestine into their classrooms. Those same forces are attacking political activism on campuses and in the streets that seeks liberation for Palestinians and a peaceful solution to the conflict in Palestine. Strategies include, but are not limited to the weaponization of the concept of oppression; lobbying local, state, and federal institutions to adopt right-wing, ideologically-driven curricula and/or legislation; and using threats and intimidation tactics against students and educators.

In order to help safeguard members' academic freedom and First Amendment rights and protect them from harm in this increasingly repressive environment, the MTA will take appropriate actions relevant to each situation to actively:

- 1. Defend members facing retaliation or harassment for their protected speech by committing support and resources from all its divisions, and use the union's communications channels to advise members of these resources.
- 2. Provide training for MTA staff and all interested members and leaders about academic freedom, First Amendment rights and how to protect members who come under attack. These trainings should be led by experts in defending education workers preK-16 on free speech issues. Training workshops should be provided by December 31, 2024, and annually thereafter.
- 3. Educate members to be equipped to oppose the weaponization of the concept of oppression in order to censor curriculum, ban books, and silence viewpoints in public education spaces. This weaponization includes dishonest redefinitions of existing terminology used to discuss oppression and oppressive

structures, as well as the invention of new terminology. Examples of this weaponization include, but are not limited to:

- The redefinition of "Critical Race Theory (CRT)," an academic and legal framework that posits that systemic racism is part of American society, but which has been redefined by some groups to mean things like "teaching children to hate white people," or "reverse racism."
- The invention of "Critical Social Justice Ideology (CSJ)," a new umbrella term that is being used to fight efforts to include the history and perspectives of people of color and LGBTQ+ people in educational curriculum.
- The dangerous and reductive redefinition of "antisemitism" to include criticism of the state of Israel, in order to suppress advocacy for Palestinian rights..
- 4. Oppose attempts to mandate the adoption of curricula produced by right-wing groups.
- 5. Oppose the movement to apply and/or formally adopt the IHRA (International Holocaust Remembrance Association) definition of antisemitism, which conflates criticism of Israel (a state) and Zionism (a political ideology) with the traditional definition of antisemitism (hostility to or prejudice against Jewish people). This false conflation is being used to suppress and censor teaching and learning about Palestine and Palestinians as well as to attack educators and students who advocate for Palestinians and express dissent from the political establishment's support for Israel's campaign in Gaza and policies towards the West Bank.
- 6. Create and publicize a mechanism for reporting and tracking incidences of educators who are retaliated against for exercising academic freedom and their First Amendment rights and report the data to the membership.

SUBMITTER'S RATIONALE:

We are facing a fundamental crisis of democracy in this country. MTA members have been, and are currently under, attack for expressing protected speech outside of schools and universities and for teaching about Black Lives Matter, Ethnic Studies, LGBTQ+ history and identity, Palestinian history and identity, and all subjects related to oppression and liberation. The pressure and fear we are experiencing is leading to self-censorship in order to protect ourselves and our jobs. This weakens democracy in and out of our schools and universities. It denies students the opportunities to receive a robust education where they can grapple critically with complex issues that will help them become fully prepared to participate in and defend democracy. Fundamental to the role of an education union is protecting its members' rights.

Furthermore, while the attack on academic freedom at all levels has been ramping up the past few years, efforts to silence widespread criticism of Israel's siege on Gaza has led to a "new McCarthyism," which includes congressional hearings with elected officials grilling university presidents. Similar congressional hearings for PreK-12 public education districts have already been scheduled for May. And if successful, efforts here in Massachusetts to formally impose the controversial IHRA definition of antisemitism will likely lead to even more repression and censorship in our public education spaces.

As an education union, we must not only defend members' rights, but we must also stand up for educators' and students' rights to teach, learn, and speak freely in a democracy.

DUES IMPACT: \$0

SUBMITTER'S COST & STAFF TIME ESTIMATE: TBD

MTA COST & STAFF TIME ESTIMATE (For MTA use only):

MTA Cost Estimate:\$0MTA Staff Time Estimate:400

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Mass Mutual Center - Springfield, MA

NBI# 21

2024 FORM FOR NEW BUSINESS ITEMS

NBI Name	Publication of Board Agenda and Alerts on Website		and Alerts on Website	04.22.2024 4:37 PM
		0		Date and Time
Kerry Costello)			Andover
Delegate Making	g the Motion	Cell	Email	Association Represented or Retired
0				•
Sarah McKeon				Framingham
Delegate Second	ding the Motion	Cell	Email	Association Represented or Retired
Accordin	g to the MTA Standing	g/Special Rules:		

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

Board Alerts which shall include all NBIs voted on at a Board Meeting shall be posted on the website within 5 business days of the conclusion of the Board Meeting.

SUBMITTER'S RATIONALE:

Policy 20.05.29 states: All future Board of Directors agendas and actions taken at the Board Meeting (as reported in the Alerts) shall be placed on the website.

No Alerts have been posted in over a year, Alerts serve as a resource for members to view highlights of Board actions until such time as official minutes are approved.

DUES IMPACT: \$0

SUBMITTER'S COST & STAFF TIME ESTIMATE: less than \$1000.

MTA COST & STAFF TIME ESTIMATE (For MTA use only):MTA Cost Estimate:\$0MTA Staff Time Estimate:Ongoing work.

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NBI# 22 2024 FORM FOR NEW BUSINESS ITEMS

Kerry Costello			Date and Time 4.22.24, 4:37 pm Andover
Delegate Making the Motion	Cell	Email	Association Represented or Retired
Sarah McKeon			Framingham
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired
According to the MTA Standing	g/Special Rules	:	

With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

The MTA shall form a Task Force comprised of staff and members to study and research options pertinent to the current website. This shall include the following immediate updates as needed such as software that allows for translation, revisions and/or recommendations for upgrades or possibly a new platform. A report to be presented by December 2024.

SUBMITTER'S RATIONALE:

The MTA website is in need of major revision and/or replacement given its current age and the availability of new platforms and programs. MTA members need an updated, user-friendly website. I would leave the number of members to the discretion of the MTA President.

DUES IMPACT: \$0

SUBMITTER'S COST & STAFF TIME ESTIMATE: \$3,000?

MTA COST & STAFF TIME ESTIMATE (For MTA use only):MTA Cost Estimate:\$0MTA Staff Time Estimate:40 hours

NBI #23

APRIL 26	5-27, 2024
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2024 FORM FOR NEW BUSINESS ITEMS

Massachusetts Local Association Region District Map			April 22, 2024 at 4:44 PM		
NBI Name			Date and Time		
Rosa Lopez-Whitehill			Pembroke Teachers Association		
Delegate Making the Motion	Cell	Email	Association Represented or Retired		
Yan Kohl			Canton Educators Association		
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired		
According to the MTA Standing With the exception of items c			l be submitted in writing to the Presiding Officer.		

MOTION

MOVED:

The MTA will digitize and update as needed the Massachusetts Local Association Region District Map, <u>https://drive.google.com/file/d/10HNXyTUiakXLB0KB_ObFtlF_OCk2HjFG/view?usp=sharing</u>, and post it on the MTA website for members to access at any time. The map will be an interactive resource for all members to find their district number, region, local presidents, board of directors, and executive committee members. When a member clicks on a town on the map a drop down menu appears with all the information for that MTA affiliated town or local. Vacancies for board of director seats or executive committee members will also be highlighted.

SUBMITTER'S RATIONALE:

A digital map creates a more cohesive representation of the leadership structures within the state affiliate and addresses the needs of younger generations that expect information to be delivered in a visual, interactive context. This map will also help remove obstacles to information that hinder members from attaining their full leadership potential.

DUES IMPACT:

SUBMITTER'S COST & STAFF TIME ESTIMATE: Not sure what the costs are to hire a website designer.

MTA COST & STAFF TIME ESTIMATE (For MTA use only):MTA Cost Estimate:\$0MTA Staff Time Estimate:40 hours

\$0

NBI #24

2024 FORM FOR NEW BUSINESS ITEMS

School Safety Database and Report	rt		April 22, 2024 at 4:44 PM
NBI Name			Date and Time
Rosa Lopez-Whitehill			Pembroke Teachers Association
Delegate Making the Motion	Cell	Email	Association Represented or Retired
Nora Acevedo			Brockton Education Association
Delegate Seconding the Motion	Cell	Email	Association Represented or Retired
According to the MTA Standing With the exception of items o	<i>"</i>		II be submitted in writing to the Presiding Officer.

MOTION

MOVED:

The MTA will create a confidential database for MTA member educators to report instances of verbal, physical, or personal property attacks at public schools and colleges. The data will be used to create a report to be presented to Governor Healey, the Secretary of Education, and the Massachusetts Department of Education to appeal the release funds and resources to address the current mental health crisis for students and educators. Funds will target mental health resources, school safety measures and increase in staff that are not based on surveillance or policing.

SUBMITTER'S RATIONALE:

As schools returned to in-person learning post the COVID-19 pandemic, educators have increasingly reported being verbally, or physically attacked, or their personal property destroyed. Educators are frustrated that their reports of incidents are ignored or covered up by school administrators. This database would expose the current crisis and the report based on the data would provide solutions that do not introduce a police state.

DUES IMPACT: \$0

SUBMITTER'S COST & STAFF TIME ESTIMATE: I'm not sure what the monetary impact would be.

MTA COST & STAFF TIME ESTIMATE (For MTA use only):MTA Cost Estimate:\$0MTA Staff Time Estimate:400 hours

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NBI#25

2024 FORM FOR NEW BUSINESS ITEMS

Anti-Privatization NBI without budgetary implications

Richard Levy Retired Delegate Making the Motion Association Represented or Retired Cell Email Andrew Gorry Professional Staff Union - Amherst Delegate Seconding the Motion Cell Email Association Represented or Retired

According to the MTA Standing/Special Rules: With the exception of items on the agenda, all substantive motions shall be submitted in writing to the Presiding Officer.

MOTION

MOVED:

NBI Name

The MTA will publicly oppose the privatization of the institution of public education or any component therein by:

 adding a page dedicated to resources and information regarding privatization and ways to oppose it to the MTA's webpage

 creating an Anti-privatization Task Force to support locals in identifying and organizing against privatization

 incorporating questions about privatization of public education when evaluating any candidates for endorsement

- endorsing only candidates who explicitly oppose privatization of public education
- providing sample anti-privatization language for member unions to include in future contracts
- working to support strengthened anti-privatization legislation in Massachusetts.

SUBMITTER'S RATIONALE:

This NBI provides methods of expanding and concretizing MTA opposition to the privatization of

ANNUAL MEETING OF DELEGATES

4.23.24

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Mass Mutual Center - Springfield, MA

Date and Time



public higher ed (below).

The Massachusetts Teachers Association opposes the privatization of the institution of public education or any component therein. The MTA recognizes that privatization takes many forms, such as outsourcing ESP services, auxiliary services and online program management; entering into public-private partnerships for early childhood education, public childcare, early college, and capital construction; filling school/college positions for multiple years with contract employees and temporary agency employees; and heavily relying on management consultants for school/college operations.

The MTA specifically opposes private-sector contracts and partnerships if it determines that such contracts have a negative impact on public education or reduce or eliminate the number of staff providing or could be providing that educational service. The MTA opposes any efforts that undermine institutions of public education by diverting funds and/or weakening their democratic autonomy. The MTA stands strongly against the transformation of educational institutions from a public good to profitable commodities and believes anti-privatization legislation is needed.Privatization harms public education by taking decision-making outside of the public view and into the hands of the private sector; it skims profit from our public school/college budgets and from student fees; it is jeopardizing the quality of education with the implementation of low cost/high profit models; it can take the control of curricula and pedagogy away from teachers; and it eliminates union jobs. Public service unions must play a central role in protecting valuable public services by opposing privatization in all of its various forms. Action is needed now because the privatization of public education started escalating during the pandemic.

DUES IMPACT:

SUBMITTER'S COST & STAFF TIME ESTIMATE:

MTA COST & STAFF TIME ESTIMATE (For MTA use only):

NEW BUSINESS ITEMS submitted by 5 p.m. on Monday, April 22, will be distributed to the delegates at Registration and commence to be considered at the Friday session. New Business Items WITH budgetary implications should be submitted either by the Monday prior to the Annual Meeting (April 22) or no later than prior to the conclusion of business on Friday (April 26) at the Annual Meeting so that they may be acted upon prior to adoption of the annual budget and the dues for FY2024-2025, which will occur Saturday morning. A new business item WITH budgetary implications is defined as any activity or action that would result in an additional expenditure of more than \$1,000 by the MTA. New Business Items WITH budgetary implications will be considered in the order in which they are received but before other New Business Items WITHOUT budgetary implications. Other New Business Items

WITHOUT budgetary implications may be submitted during the meeting up to the **end of the first hour** on Saturday morning (by approximately 10 a.m. Saturday, April 29). These may be considered during the meeting in the order in which they are received.

New Business Items with a policy implication must be submitted by 5 p.m. on the Monday (April 22) prior to the Meeting of Delegates and shall be considered throughout the meeting at times determined by the Presiding Officer.

Submit to MTAGovernance@massteacher.org

If you have any questions, please contact Jennifer Freeling, Director of Governance and Administration Division at 617-878-8213 or jfreeling@massteacher.org.