

Boston Teachers Union Election Results 2023



See pages 4 & 5.

BOSTON TEACHERS UNION, LOCAL 66, AFT
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President's Report Jessica Tang

Organizing for Change: We Are All "The Union" and the Answer is "All of Us!"



Jessica J. Tang
BTU President

As our schools continue to recover from the last few years that were upended by the COVID pandemic, the challenges this past school year have continued to feel heightened. Too many students, families and adults have faced dysregulation and increased anxiety from years of instability as well as loss. The sense of "normalcy" has shifted in ways that are deeply troubling — from the prevalence of mass school shootings and "lock downs" to reports of book bans and the loss of professionalism accorded to educators, the nation's schools have felt like the epicenter of many political storms and have born warning signs to the erosion of democracy.

While our resilient school communities have found many ways to shelter themselves from the storms and troubles, there are certain unprecedented challenges that may seem insurmountable. Perhaps in unprecedented numbers, we have had to come together to organize within our school communities to force the changes that we need for our students to succeed. The process has not always been swift. Oftentimes when there are challenges in the school, there is a belief that if someone just "calls the union," the problem can be fixed. Sometimes, this is the case. However, more often than not, the solution is not just for someone to make a call, but to organize together to make the changes we need to see and to take the time to organize and engage other educators. This is, after all, the point of a union—not that any one individual is the solution to the problem, but rather that we collectively are stronger together.

We see this strong union culture in schools where there is a habit of collaboration and collective action and where systems and structures to ensure shared leadership and democratic decision-making are in place. Schools where Building Reps act not just as two-way communicators between schools and the union leadership, but also help to organize and engage all BTU educators in both school-based and city-wide or even state-wide actions. These schools usually have regular Faculty Senate meetings that tackle problems with solutions, and active School Site Councils where all stakeholders have a voice and make decisions together.

That culture, however, did not just appear overnight. It took many years and a lot of organizing to help get those schools to where they are at now.

Unfortunately, this year we have seen an increase in the tactics used to keep us disorganized: fear, hopelessness, division, confusion. We see these obstacles coming from a variety of sources, including a top-down, bully school leader who creates a culture of fear and retaliation; inexperienced and insecure school leader who does not know how to ask for help; a lack of resources leading to a culture of competition as opposed to collaboration;

lack of safety to try new things or divert from scripted curriculum... the causes are many and unfortunately, common. The good news, however, is that solutions are also within and amongst all of us.

When we organize together and show that the staff in a school are united over an issue or cause, it shows strength and that we have the solutions that need to be enacted. However, to get everyone on the same page, it often takes time and there is tension when there is also a great sense of urgency and energy to "do something." Taking an action in the short term may be easy for a small group of people to

do and may feel great in the moment, but it doesn't always lead to change that is desired and can actually harm the goal in the long run. It may take longer to get 80 people committed to take an action, but it is more powerful than if only 10 people show up for an action. Organizing takes time, many one to one

continued on page 2



MICHAEL McLAUGHLIN on his retirement!

16 years as BTU Elementary Field Rep. and the last two years as Secretary-Treasurer!



(L-R) Ava, Michael, Peggy and Darby McLaughlin

AND

MICHAEL J. MAGUIRE

for 13 years of integrity and commitment to the *Boston Union Teacher* newspaper!

"Mea navis aëricumbens anguillis abundant."

See Michael Maguire's thank you letter on page 2.

InterGeneration: Local Filmmaker Uses Animation to Connect BPS Teens and Local Elders

“The film *InterGeneration* follows a group of Boston teens in an after-school program as they forge relationships with Boston elders during the early stages of the pandemic. A glimpse into an educational process beautifully visualized through the teens’ hand-made, stop-motion animation, the film shows the power of cross-generational storytelling to build community in a time of crisis.”

<https://www.intergenerationfilm.com/>



Carolyn Shadid Lewis, BPS parent and filmmaker, recently released a film that was made in collaboration with the Bridge program of the Eliot School School of Fine and Applied Arts. Carolyn thought it would be great to bring the community elders together with teens to share their stories about growing up in the Boston area and to experiment with animation. Carolyn, who has a background in art, always loved to tell stories through art. Her first job was animating distance learning coursework at an Army College in Kansas for soldiers who were deploying to Iraq and Afghanistan.

“My dad was in the military and we talked about the long history of generational memories that we have a hard time sharing.” Using animation is a way to allow the stories to take life. My interest was intergenerational connection and the mentorship that can happen. In this project, during the Covid quarantine, the elders were there for the teens and the teens were there for the elders who were really isolated. The teens gave them perspective on their lives; it was a mutually beneficial relationship for both sides.

“This film is important because it taps into a social emotional element that teens need right now. We need to ground young people in a historical context where they can understand themselves within a society that has a greater good.”

“In making this film, I was changed by the process. I received wisdom from both the teens and the elders. It was an amazing experience. I still talk to the elders all the time and I try to keep up with the teens. It has been so beneficial to me beyond the class.”

This wonderful film is perfect for classroom use and for teacher professional development. Colorful animation techniques bring the stories



Animation still by Giovanni Depina of the Wampanoag Myth of Moshup the Giant as told by Robert Peters.

of elders to life. The narrators share their oral history illustrating the experiences of people of color who emigrated to Dorchester and Roxbury over the last century. Stories include experiences of navigating issues of race and how

the narrators acted as change agents in their lives. These stories are animated by student artists who then share their own stories and experiences from family traditions like doing hair on Sunday mornings to feelings of isolation during



Anne Slater
Boston Union Teacher
Co-Editor

quarantine.

InterGeneration has been accepted for a national public television broadcast on PBS member stations next year. Teachers can contact Carolyn Shadid Lewis through the films site:

<https://www.intergenerationfilm.com/>

Here is where you can request information about an educational license or to book a screening:

<https://www.intergenerationfilm.com/book-a-screening>

Organizing for Change:

“We Are All “The Union” and the Answer is “All of Us!”

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conversations and a plan. This often feels too slow or not impactful in the short term, but the African proverb, “If you want to go fast, go alone. If you want to go far, go together” applies to successful organizing, too!

There are examples of this in action all across the country. Former and late Chicago Teachers Union president, **Karen Lewis**, a visionary leader who led the historic 2012 Chicago Teachers Union and was known for the guiding questions she would always ask before taking on a new organizing campaign: “Does it unite us? Does it build our power? Does it make us stronger?” While not every single issue that comes up will be a widely felt and deeply felt issue, taking the time to think about these three questions and how actions are either uniting, dividing, strengthening or weakening us a whole union, must be considered as we choose an issue and plan for any action. Creating an organizing plan that unites us and builds our power can often take time, but as folks experience the power of taking strategic and well-thought out actions together, it builds our strength over time

We saw this in action at our Up Schools this past year as well. A small group of Up BTU members at one of the Holland schools saw the inequity of their long hours and less pay. Together, with the support of BTU staff, they took the time to make an organizing plan that would test and see if it was a deeply and widely felt issue—not just at the Up Holland, but also at the other two Up schools. They also created an organizing plan that would anticipate needed escalation and strategy. The result was a campaign for “*Equal Pay for Equal Work*” that involved structure tests and organizing across all three schools. Ultimately, we were able to win contract language that ensures that all of the teachers at the Up Schools at minimum have the Schedule A Pay for the additional hours they work.

Oftentimes a small minority of individuals in a school can believe in a righteous cause and decide to take some sort of action on their own because they feel they have to “do something.” However, despite the good intent, if others in the school are not engaged and also organized to take action, it can actually create more divisiveness amongst the staff. It can also create a harmful environment where Building Reps become targets of retaliation or where staff become pit against each other. Doing the work to get a supermajority of BTU members in agreement both about the problems and solutions as well as what actions to take to get the solutions needed can take time and feel slow or frustrating, but in the long-run it strengthens the outcomes and is an opportunity to build power and activate others to take action and build their organizing muscles. This enables us to then be more proactive, and less reactive.

Over the last few years, as a union, we have invested resources in growing our organizing team, and to help us move towards not just transactional change, but transformational change. We have member-organizers, a summer organizing institute, fall leadership conference, and increasing opportunities

for all of our members—in service and retired—to learn the organizing skills we all need to build power, become organizers, and be the change we want to see. Our Faculty Senates, organizing committees, Building Rep structures are all ways we are trying to facilitate this work. It is not easy, and is still a work in progress, but it continues to be fundamental to our strategic priorities of democratic structures, being proactive and fighting with our students, families and stakeholders for a broader vision of social, economic and racial justice.

While BTU staff are always here to support each individual and each school as best we can, we are a relatively small staff serving over 10,000 members and cannot always be everywhere all at once. That is why our success must be in our collective power and action, and must be done with an organizing framework—none of us can do it alone—but because “the union” is each one of us in each of our school sites, programs and communities, we can do it together. And each time one individual school or program is able to organize and take successful actions that unite us, especially when we stand in solidarity with each other, we continue to build our power and make us stronger, so that all of our members benefit. This is the work we must double down on for the fall, not just as we tackle the challenges in our schools, but as we begin our new contract campaign this upcoming school year as well.

So please remember as we regroup and head into the fall, “the Union” is not the staff, or a building or a place... “the union” is all of us, and we are the answer to the problems we face, together.

Verba volant, scripta manent.

Dear Union Sisters and Brothers,

After thirteen years of co-editing the *Boston Union Teacher* newspaper, I am stepping down. Serving the union has been a joy beyond my expectations. I want to thank former BTU president **Richard Stutman** for hiring me to fill the vacancy created when **Mary Glynn** retired, and I want to thank current BTU president **Jessica Tang** for keeping me on.

Over the years I have had the pleasure of working with very fine union activists and truly remarkable co-editors: **Garret Virchick**, **Colum Whyte**, and **Anne Slater**. I shall miss working with Anne and wish my replacement all the luck in the world.

I shall stay involved in our union - and in our classrooms - as I am not retiring from either. I still have a few years left in me, so I want to pass my position on to a different classroom teacher, so that that person can bring a new perspective to the job.

I say classroom teacher because on the Executive Board this year I fought for and won the continuation of the practice that the co-editors of the newspaper be classroom teachers. There had been a plan to fold the editorship of the newspaper into the newly-created Communication Assistant. I believe that school-based personnel should be in charge of stories about and by school-based personnel. Secure in the knowledge that the newspaper will stay in the hands of classroom union members, I now take my leave.

*Wishing you a restful summer,
Michael J. Maguire*

BTU Phone Numbers	
Office	617-288-2000
Health & Welfare.....	617-288-0500
AFT Massachusetts	617-423-3342
Function Office	617-288-3322
Lounge Office.....	617-288-3322
Vision Center.....	617-288-5540
Tremont Credit Union.....	781-843-5626

Do Permanent Teachers Get Reimbursed For Required Additional Licensure?



Caren Carew
BTU Secondary
Field Representative

The new teacher's contract states; "BPS will reimburse teachers up to \$3,000 during their employment with the BPS for the cost of obtaining another license required by BPS for the teacher's position, including but not limited to those working under a waiver or emergency license. Teachers shall be reimbursed for the following expenses: MTEL prep courses from a provider on a list established by the Office of Human Capital, MTEL tests, graduate coursework, license fees and BPS Pathways Programs, provided that the teacher submits receipts to the Office of Human Capital within the fiscal year that the expenses were incurred."

What's the role of the new position "Inclusion Education Liaison" in assisting with the success of inclusion's expansion in the BPS?

In the new BPS/BTU contract the language states; "For school years 2022-23 to 2026-2027, the parties [BTU and BPS] will fund an Inclusive Education Liaison. The Liaison will play a critical role in implementing our shared vision of an inclusive district. The specific job description will be mutually agreed upon by the parties, but responsibilities will include:

- Promoting labor-management collaboration in support of the vision,
- Assisting BTU members with resolving challenges, questions, or concerns related to inclusive education and the provision of special education and ESL services,
- Serving on BPS committees or work groups related to the vision as appropriate,
- Documenting monthly progress reports to the Superintendents that highlight areas of strength and needs improvement related to implementation,
- Communicating educator concerns and feedback to the working group
- Attend School Committee meetings as needed to be available to answer questions."

The Inclusion Education Liaison is **Katelyn (Katie) DeLaRosa** and can be contacted at kdelarosa@btu.org about questions and concerns relative to special education and ESL inclusion services, Inclusion Planning Teams (IPT), and the like.

When can a teacher collect Unemployment Compensation?

A teacher is eligible for Unemployment Compensation when they have been laid off or have not been rehired by the school system. If a teacher has been issued a letter of termination and has not been rehired as of the effective date of said termination, then they are eligible for Unemployment benefits.

When a terminated teacher is paid over the summer months due to being on a 26 paycheck schedule, they are still able to collect Unemployment. These 'summer payments' are based on a percentage of their pay that has been deducted from each paycheck throughout the school year added together to provide said teacher with 'stretch' payments over the summer based on work already done between September and June of that academic year.

If a provisional teacher has been granted a letter of Reasonable Assurance (RA), they are **NOT** eligible to col-

lect Unemployment because they have been reasonably assured of a job in the upcoming academic year. If a provisional teacher has not been granted an RA, and has received a termination letter from the BPS, they ARE eligible to collect Unemployment Compensation.

If a teacher has been terminated due to just cause and has done so via a settlement agreement drawn up with the BPS Labor Relations Department, then they must refer to the terms of said settlement in relation to filing for Unemployment Compensation when applicable.

To obtain more information, call the Massachusetts Division of Employment via the web www.detma.org/workers/howtofile.htm or by phone TeleClaims services at 1-877-626-6800 or 617-626-6800. Hours are Monday-Thursday 8:30 am-6:30 pm; Friday 8:00 am-4:30 pm.

What does COBRA mean?

COBRA stands for the Consolidated Omnibus Reconciliation Act of 1985. It is the law that requires employers who offer group health insurance plans to give their employees the opportunity to stay on their group health insurance plan if they are no longer employed by the employer and the former employee isn't eligible for health insurance coverage through a spouse's insurance.

If a teacher is terminated from the BPS/City of Boston, they will be mailed information about COBRA benefits. For further inquiries concerning COBRA continuation of coverage, get in touch with the Health Benefits and Insurance Office, Room 807, City Hall. Give them a call at 617-635-4570.

If I move, get a new phone or email address and update it on the HUB does BPS automatically notify the BTU?

No. You must contact the BTU directly to update changes of address, phone numbers, and email addresses. The BTU does not have access to the updates you file with the BPS.

What is the severance pay policy in the BPS for teachers?

The BTU Contract details, "Persons who retire, resign, or die after ten (10) years of teaching in the BPS shall be paid at the ratio of 40% of accumulated, unused sick days, without limitation. Payment shall be based on the annual rate of pay of the person at the time of death, retirement or resignation. In the event of death, payment shall be made to the estate." ... "severance shall be paid in two installments. One half of the payment shall be made on or before December 31st of the year of retirement, and the other half shall be paid on or before December 31st of the year after retirement." If a person has taught less than ten full years in the BPS, they lose their accumulated sick days if they leave the system.

Is summer school treated like the regular school year contractually?

No, it is not. Summer school is not governed by the collective bargaining agreement in the same way the standard school year is. Some time ago the BTU took the issue of summer school salary not being retirement worthy to

court to demand that this earned income be retirement worthy. Unfortunately, the court ruled against the case. The BTU/BPS contract reports, "The School Department shall determine the summer program curriculum, all aspects of operation and administration of the program, including employment in the program, salary, hours, and conditions of employment. Employee participation in the summer program shall be voluntary. Selection of employees shall be as determined by the [school] Department."

What can be done if someone is being harassed in the BPS?

The BPS has a Superintendent's Circular #EQT-4 'Non-Discrimination and Zero Tolerance Policy', which outlines BPS's commitment to "maintaining an educational environment and workplace where bigotry and intolerance, including discrimination on the basis of race, color, national origin, sex, sexual orientation, religious beliefs, disability, or age have no place, and where any form of intimidation, threat, coercion and/or harassment that insults the dignity of others and interferes with their freedom to learn or work is unacceptable."

The circular emphasizes; "Therefore, any form of discrimination or harassment, as described [in the body of the circular], of any BPS student or employee shall be viewed as serious misconduct and shall result in discipline, up to and including termination of the offending employee or expulsion of the responsible student." It is suggested you review the circular in it's entirety and if after doing so feels compelled to report such matters as set forth should do so in Superintendent's Circular #EQT-2 'Employee Grievances of Discrimination or Harassment', #EQT-3 'Student Grievances of Discrimination or Harassment'. For additional info contact BPS Equity Office at 617-635-9650.

There are also State and Federal remedies outlined at the end of Superintendent's Circular #EQT-4 to file complaints concerning harassment with the (MCAD) Massachusetts Commission Against Discrimination 617-994-6000 or The United States Equal Opportunity Commission (EEOC) located in the JFK Federal Building in Boston.

Do I get time off to go to court?

The contract states; "The Boston School Department will provide release time without loss of pay for court appearances on school business, including cases involving job-related teacher assaults."

If you are being brought to court by or are bringing a student to court, you get release time. If you have jury duty, you must give a copy of the jury duty letter to your school's secretary. Once you have successfully completed the jury duty service, give a copy of the certificate/letter you receive from the court indicating same. You will then have that time properly coded by the school secretary so it will not be deducted from your sick/personal days. Make sure you carefully scrutinize your pay stub to determine if that has occurred.

If you are subpoenaed to court by someone non-related to school business, or if you are appearing at court for an appeal of a moving violation, and the like, that is not covered under court leave and will be deducted from your sick/personal days.

Is there coverage for a Special Ed Paraprofessional when they are absent?

The BTU/BPS Collective Bargaining Agreement in Article VII, Section A details; "Effective during the 2012-13 school year and through August 31, 2016, the School Department shall hire and maintain twenty (20) coverage paraprofessionals". "The School Department shall deploy these coverage paraprofessionals to cover for 1:1 paraprofessionals and paraprofessionals in substantially separate classrooms who are absent and to supplement current paraprofessional services."

Boston Union Teacher

EVERYONE IS WELCOME HERE!

¡TO DOS SON BIENVENIDOS AQUÍ!

EVERYONE IS WELCOME HERE!

BLACK LIVES MATTER

Boston Teachers Union,
AFT Local 66, AFL-CIO

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President
JESSICA J. TANG

Vice President
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Secretary-Treasurer
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Co-Editors
MICHAEL J. MAGUIRE
ANNE SLATER

Editorial Board
Caren Carew **Tim Maher**
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EDITORIAL NOTE:
The opinions expressed in the *Boston Union Teacher* do not necessarily represent the views of the Boston Teachers Union, or those of its members.

WHEN WRITING:
All correspondence to the *Boston Union Teacher* must be typewritten and include the author's name and school or department if not school-based. All articles must be appropriate to the publication, and in good taste. Letters to the Editor should be sent to letters@btu.org

DEADLINE:
The deadline for submitting articles for the next issue of the *Boston Union Teacher* is July 12th. All copy should be e-mailed to mmaguire@btu.org and aslater@btu.org. This deadline will be strictly adhered to.

180 Mount Vernon Street | Boston, MA 02125
617-288-2000 | Fax 617-288-0024 | www.btu.org

Boston Teachers Union Election Results June 7, 2023

The BTU Election Committee would like to thank **ALL** the members who ran for office. This is a big commitment of time and resources and helps to keep our union vibrant. Thanks also to **ALL** who participated by **VOTING**. 1,977 members voted by mail and 117 members made their way to the hall to vote in person. Thanks to **Michelle Frank** from the BTU office for her assistance in keeping membership lists updated and supporting the election process from start to finish. This was the third election run by MK Elections and again we were very pleased with the process. Only 59 ballots were returned as undeliverable and 126 replacement ballots were issued.

Please be sure to fill out the survey in the *E-Bulletin* to provide feedback about the election process. This helps the election committee sum up and make improvements.

Congratulations and thanks to all the officers who serve so diligently sometimes literally day and night and to those who volunteer their time on the RTC, Executive Board, Paraprofessional Council and as Delegates.

The results of the election are as follows:

BTU OFFICERS

President

✓ Jessica Tang (BTU Office) 1,786

Vice President

✓ Erik Berg (BTU Office) 1,698

Secretary-Treasurer

✓ Karen Cross (Murphy K-8) 1,199
Trevour Smith (Boston Latin School) 693

Political Director

✓ Johnny McInnis (BTU Office) 1,741

Elementary Field Representative

✓ Lea-Antoinette Serena (BTU Office) 709

Secondary Field Representative

✓ Caren Carew (BTU Office) 752

Paraprofessional/Substitute/ABA Field Representative

✓ Colleen Hart (BTU Office) 264

EXECUTIVE BOARD

✓ Brenda Chaney (Retired) 1,159
 ✓ James (Timo) Philip (Retired) 1,048
 ✓ Michael Maguire (Boston Latin Academy) 1,041
 ✓ Alice Yong (Retired) 1,010
 ✓ Robert P. Carroll (Retired) 809
 ✓ Allison Doherty (Fenway High School) 710
 ✓ Caitlin Gaffny (Maurice Tobin K-8) 687
 ✓ CasSandra Samuel (Curley K-8) 658
 ✓ Nicole Mullen (Boston Arts Academy) 601
 ✓ Matthew Ruggiero (Charlestown High School) 598
 ✓ Cecil Carey (Charlestown High School) 593
 ✓ Kafunda Banks (ABA Special Ed.) 582
 Danielle West (Curley K-8) 552
 A. Vanessa LaRocque (Madison Park) 527
 Keisha Lewis (Fenway High School) 467
 Maria Brooks (Mather Elementary School) 446
 Michelle Carroll (O'Donnell Elementary School) 444
 Tracy Doyle (Perry K-8) 392
 Tracy Romain (Chittick Elementary School) 324

✓ Elected

RETIRED TEACHERS CHAPTER

Chair

✓ Marilyn Marion (Retired) 975

Vice Chair

✓ Roz Avant (Retired) 947

Treasurer

✓ Mae Bishop (Retired) 944

Secretary

✓ Joan Devlin (Retired) 961

PARAPROFESSIONAL COUNCIL

✓ CasSandra Samuel (Curley K-8) 157
 ✓ A. Vanessa LaRocque (Madison Park) 146
 ✓ Christine Buttiglieri (Retired) 126
 ✓ Adrienne Jordan (Sumner Elementary School) 123
 ✓ Debra Brown (Kenny Elementary School) 122
 ✓ Sharon O'Dwyer (Joseph Lee K-8) 121
 ✓ Todd Kerr (Coverage Para) 120
 ✓ Mary Thomas (Curley K-8) 106
 ✓ Sau "Kitty" Yip (Josiah Quincy Elementary School) 106
 ✓ Bianca Pierre (Beethoven Elementary School) 103
 ✓ Tracy Romain (Chittick Elementary School) 100
 ✓ Cynthia Ferris (Perry K-8) 99
 ✓ Sacha Ruiz (Fenway High School) 98

**Thank You for Voting
in the
Boston Teachers Union
2023 Election!**



DELEGATES

(Listed in order of voting results – cut-offs for representation at affiliated bodies will be determined at a later date based on these results.)

Jessica Tang (BTU Office)	1,066	Lucinda Mills (Counseling Services)	286
Caren Carew (BTU Office)	1,025	Darren Wells (Trotter K-8)	280
Brenda Chaney (Retired)	899	Thomas Hocker (Retired)	278
Erik Berg (BTU Office)	898	Regina Temple (Retired)	273
Alice M. Yong (Retired)	832	Michelle Carroll (O'Donnell Elementary School)	267
James (Timo) Philip (Retired)	802	Teresa Reaves (Retired)	264
Michael Maguire (Boston Latin Academy)	781	Dana Royster-Buefort (Retired)	259
Karen Cross (Murphy K-8)	753	Layla Cable (Retired)	254
Thomas Gosnell (Retired)	750	Maria Brooks (Mather Elementary School)	254
Johnny McInnis (BTU Office)	698	Erica Kouka (BTU Office)	253
Marilyn Marion (Retired)	663	Paul Christian Jr. (O'Bryant High School)	244
Mary Ann Urban (Retired)	645	Sylvaine Lestrade (Trotter K-8)	241
Robert P. Carroll (Retired)	614	Katina McClain (BTU Office)	239
Betsy Drinan (Retired)	605	Adrienne Jordan (Sumner Elementary School)	235
Colleen Hart (BTU Office)	603	Debra Brown (Kenny Elementary School)	232
Roz Avant (Retired)	599	Carla Johnson (Shaw Elementary School)	229
Joan Devlin (Retired)	578	Tatiana Williams-Rodriguez (Boston Latin Academy)	221
Charles Johnson (Retired)	538	Danielle Fraine (ABA Special Ed.)	202
Mae Bishop (Retired)	533	James Cordero (East Boston High School)	198
Paul Tritter (BTU Office)	494	John Enright (Madison Park)	193
Allison Doherty (Fenway High School)	479	Declan Power (Succeed Boston)	193
Trevour Smith (Boston Latin School)	478	Tim Maher (New Mission High School)	191
Maritza Agrait (Retired)	463	Sharon O'Dwyer (Joseph Lee K-8)	188
Josefina Lascano (Retired)	443	Todd Kerr (BTU School)	180
CasSandra Samuel (Curley K-8)	438	Bianca Pierre (Beethoven Elementary School)	179
Caitlin Gaffny (Maurice Tobin K-8)	428	Tracy Romain (Chittick Elementary School)	176
Cecil Carey (Charlestown High School)	425	Noah Patel (Roosevelt Upper School)	175
Paul Tenney (Retired)	420	Amrita Dani (Teaching & Learning [Elementary])	163
Lea-Antoinette Serena (BTU Office)	397	Claude James Jr. (Madison Park High School)	161
Gayle Marrow (Retired)	392	Christine Gorman-Arnold (Sumner Elementary School)	158
Denise Berkley (Retired)	388	Ivelisse Santos-Hicks (New Mission High School)	158
Sherry Pedrone (Retired)	388	Karen Kilmain-Patriquin (Sumner Elementary School)	155
Matthew Ruggiero (Charlestown High School)	380	Jukurious Davis (Teaching & Learning [Elementary])	152
John Simonetti (Retired)	378	Stephanie Wing (Gardner Pilot School)	149
Kafunda Banks (ABA Special Ed.)	372	Mary Bell (Mattahunt Elementary School)	148
Marjie Crosby (Retired)	368	Heather King (Orchard Gardens K-8)	148
Christine Buttiglieri (Retired)	360	Marta Johnson Faldasz (Roosevelt Lower School)	147
Natalia Cuadra-Saez (BTU Office)	350	Josette Teneus (Charlestown High School)	145
Michael Crain (Retired)	349	Randi Davis (Gardner Pilot Academy)	144
A. Vanessa LaRocque (Madison Park)	345	Nina Lessin-Joseph (Holmes Elementary School)	140
Kristen Pinto (Retired)	343	Amy Gebo (Lee Academy Pilot School)	139
Nicole Mullen (Boston Arts Academy)	339	James Kennedy (Margarita Muñiz Academy)	134
Karen M. Wood (Boston Latin Academy)	317	Suzanne McGlone (James W. Hannigan K-8)	134
Kimvy Nguyen (SpED Services Coordinator)	317	Molly Bryson (Succeed Boston)	125
Keisha Lewis (Fenway High School)	316	Katie Mallon (Holmes Elementary School)	124
Danielle West (Curley K-8)	308	Samantha Weintraub (Sumner Elementary School)	121
Catherine O'Flaherty (Boston Latin School)	304	Cynthia Ferris (Oliver Hazard Perry K-8)	117
Diane Crain (Retired)	303	Chelsea Ruscio (Dudley Street Charter School)	113
José Valenzuela (Boston Latin Academy)	293	Elisa Sota (Mather Elementary School)	111
Nora Paul-Schultz (O'Bryant High School)	289	Samantha Laney (Holmes Elementary School)	93
Teresa Underwood (Retired)	288	Connor Echols-Jones (Perkins Elementary School)	78



BUILDING REPRESENTATIVES OF THE YEAR

SECONDARY EDUCATION

By Caren Carew, BTU Secondary Field Representative

I'm proud to announce the 2023 Secondary BTU Building Reps of the year. The English High School has had a storied history as the first public high school in the country. It boasts a strong and proud alumni association. While the last couple of decades have been challenging for EHS with DESE intervention, being a Commonwealth Pilot School followed by Turn Around designation then by Level 4.5 status, The EHS staff and community have worked hard to live up to its' potential and this year that hard work, hope and belief paid off when, after over 13 years, it earned an exit to its' TA status. As an EHS BTU Building Representative, **Frank Swoboda** was heavily involved in preparing for and participating in DESE Monitoring Site Visits over the many years to demonstrate the effective work of EHS BTU members as well as the ongoing success and progress of their students. When DESE finally recognized their school's achievement of their goals, Frank and his fellow two BTU Reps, convened several meetings to identify BTU member priorities for their revised working and teaching conditions followed by several more meetings with BTU and BPS leaders to represent the views of the EHS BTU membership in order to negotiate a new, more equitable working agreement.

Frank has taught history for 11 years in BPS all at The English High School and has been a BTU Rep since 2016. The EHS School Site Council was defunct in 2017, so he spearheaded its re-start and is proud that 21 diverse BTU members including teachers, paras, social workers and school counselors have served on SSC since then. He successfully organized and brought back the Faculty Senate in 2020 after five years without any meetings. He's served on a teacher-led Data Team to track student progress and develop interventions around school culture, academics & instruction and SEL. Frank's served on ILT & co-facilitated the history department and has been a part of establishing a school-wide grading policy. While chaperoning for EHS Outdoor Adventure Club and Sapere Aude travel program, he's taken students to the White Mountains, Italy, France, Germany, Czech Republic, and Greece. When his feet have been firmly planted in the halls of English High, he's been a very reliable BTU Building Representative in supporting colleagues in disciplinary Investigatory Meetings as well.



Currently, as a middle school English teacher at Boston Latin Academy, **Cathy O'Flaherty** has also been an outstanding and diligent BTU Building Representative. A teacher for 27 years; in BPS at BLA preceded by teaching at the BPS Curley Middle, Cathy previously taught in Newton public. Cathy is a school-based National Board Cohort founder/leader, member of the BTU/BPS National Board Leadership Team, has been a New Teacher Developer, a presenter at NEATE & NCTE conferences, member of the districtwide BTU/BPS Professional Development Advisory Team, a Boston Teacher Fellowship summer coach, a Facilitator in the Teacher Leadership in Policy Program through the BTU/AFT, a BTU Inclusion Committee member, and member of a curriculum committee for a girl's school being started in Nyamata, Rwanda.

As a BTU Building Representative for many years, Cathy has consistently been a go-to person attending Investigatory Meetings as well as other potential disciplinary meetings with her BTU colleagues. You may think that being a BTU Rep at an exam school is a breeze. If so, you'd be very wrong. The breeze can turn into a tsunami pretty quickly, which has occurred on a number of occasions at BLA. Currently, there have been an ongoing series of challenges with administration which have required a plethora of interventions, mediations, meetings and organizing. This type of activity can be a delicate balance of collaboration and when that activity is less than efficacious, taking action. When engaged in the real work of trying to improve conditions, communication, and school climate, there can be anxiety, despair and anger. How to manage these reactions by oneself and colleagues takes experience, the ability to listen, speak up and effectively work with others in order to try to achieve an outcome supportive of the BTU members and that is beneficial to our students. Cathy works effectively with her fellow BTU BLA Building Reps and Faculty Senate members towards achieving these goals despite set-backs and road blocks that could make one feel as if they were hitting a wall. Never daunted, she continues to support and work with her fellow BTU members towards a better BLA for the entire community. Ever involved in the BTU, Cathy is also a member of the BTU Election Committee in between taking the Pathways Program for Moderate Disabilities, earning National Board Certification and being a Teach to Lead participant.

These two BTU Building Representatives can multi-task successfully as both effective educators and effective union leaders and I thank them and the many like them in our schools and members of our union for pouring their heart and soul into making the world a better place, one kind act at a time.



ELEMENTARY EDUCATION

By Lea-Antoinette Serena, BTU Elementary Field Representative

Maria Brooks has been an active building rep for years. She collaboratively works things out on the school level and is always thinking about solutions. In the midst of lots of changes at the Mather Elementary School between inclusion, sixth grade expansion, and a new dual language program just to name a few, Maria has kept the Mather educators moving and motivated. Maria has been the building rep under at least four different principals and has still been able to support in keeping staff culture positive and pushing towards solutions! She was previously part of the E-board and Inclusion Done Right committee. She is never missing from a BTU social or conference. She is also truly a mobilizer, always thinking about who to bring into leadership and who to uplift. She is supportive and patient. **Maria Brooks** is truly a one of a kind building rep!



Karen Cross is not only our newly-elected Secretary-Treasurer but an amazing building rep. She is inquisitive and solution oriented. Karen has led her school gracefully, always making sure to ask questions before making decisions and trying to include her school in all union activities. She supported students in participating in our Lunar New Year celebrations and even had students outside on election day! She has dressed up as *Pete the Cat* in our book fair and taken advantage of many union opportunities! She is part of APALA and racial justice standing committee, and has been a member organizer. There is nothing Karen will not do for the members at the Murphy or all of us here at the BTU!

PARAPROFESSIONAL

By Colleen Hart, BTU Paraprofessional Field Representative

Awilda Concepcion, Blackstone, as we all fondly know her as Ms. GiGi. Awilda has been building rep for five years at the Blackstone. She is a member of the para council. GiGi is someone who is the first one to say, "What do you need?" and "I got this!" You can always count on her. Must like she supports her colleagues at Blackstone, she also supports her fellow council members and paraprofessionals. She brings light into a room. I am grateful to have her as a fellow paraprofessional and a council member and a BTU sister.

Here are some words from some of her co-workers:

"She is Wonderful."

"She never has a no for us, and the best thing is if she does not have the answer at the moment, she looks for it and brings it back."

"When I ask her something and look for her she is always there for me."

"GiGi is the best."

"She is motivated and energetic. She wants everyone involved/included and wants everyone informed."

"You couldn't ask for more from a building rep. Truly a blessing."

I would like to say, Thank you Awilda (GiGi) for all you do for your fellow BTU members and your students and families at Blackstone. Congratulations.



Tracy Romain, Chittick Elementary, has been a building rep at Chittick for four years. She was also a Soul for BTU and she has worked closely with the BTU organizers. Tracy is someone who steps up when asked. She has assistance at many BTU events. Tracy makes you feel welcome at all times when you meet her at BTU or the school. I am grateful to have her as a fellow paraprofessional and a BTU sister.

Here are some words for one of her coworkers.

"Tracy keeps us informed and always there for us."

Thank you Tracy for all you do for your fellow BTU members and your students and families at Chittick. Congratulations.

AFTMA Holds Its Annual Conference

The American Federation of Teachers is a union of professionals that champions fairness; democracy; economic opportunity; and high-quality public education, healthcare and public services for our students, their families and our communities. We are committed to advancing these principles through community engagement, organizing, collective bargaining and political activism, and especially through the work our members do

Every year, AFT Massachusetts awards thousands of dollars in scholarships to eligible high school seniors who are dependents of AFT Massachusetts members. The awards, named in honor of former AFT leaders **Kathy Kelley**, **Albert Shanker** and **Sandra Feldman**, and for long-time AFT Massachusetts field representative **Jay Porter**, are awarded on the basis of a labor history exam administered by the Massachusetts AFL-CIO.



"We don't do this for the money. We wouldn't be in these professions if we didn't believe that the labor movement, public education, and what we do are more important than a paycheck."

Randi Weingarten at the AFT-Massachusetts Annual Convention



Sandra Feldman Scholarship Award

Declan Hocker, Archbishop Williams, is the son of two BTU members: **Tom Hocker** (retired) and **Karen Wood** (BLA). Declan Hocker was not in attendance for the award ceremony because he was competing in the USA Men's Eastern National Gymnastics Competition, where he placed 6th in the nation (4th on vault, and 3rd on high bars!). Way to go, Declan. His 5th grade teacher, **Karen Cross**, accepted the award on his behalf.



BTU Secretary-Treasurer's Report Michael McLaughlin

Independent Auditor's Report

Opinion

We have audited the accompanying financial statements of Boston Teachers Union (a nonprofit organization), which comprise the statements of financial position as of August 31, 2022 and 2021, and the related statements of activities, and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Boston Teachers Union as of August 31, 2022 and 2021, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of Boston Teachers Union and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation of and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions, or events, considered in the aggregate, that raise substantial doubt about Boston Teachers Union's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Auditor's Responsibility for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free of material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements. An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on

the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statement.

In performing an audit in accordance with generally accepted auditing standards, we

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Boston Teachers Union's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about Boston Teachers Union's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Report on Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The schedules of expenses on pages 12 and 13 are presented for purposes of additional analysis and are not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole.

—Joseph B. Cohan & Associates, P.C.
Norwood, Massachusetts, April 19, 2023

BOSTON TEACHERS UNION STATEMENTS OF FINANCIAL POSITION AUGUST 31, 2022 AND 2021		
	2022	2021
ASSETS		
CURRENT ASSETS		
Cash	\$ 5,790,630	\$ 5,707,305
Investments (Notes 3, 4 and 5)	9,326,638	10,443,392
Accounts Receivable	411,879	355,966
Prepaid Expenses	239,586	237,857
TOTAL CURRENT ASSETS	15,768,733	16,744,520
PROPERTY AND EQUIPMENT (NOTE 1)		
Furniture, Fixtures & Equipment	743,702	717,413
Leasehold Improvements	300,470	300,470
	1,044,172	1,017,883
Less - Accumulated Depreciation and Amortization	974,019	954,232
	70,153	63,651
TOTAL ASSETS	\$ 16,838,886	\$ 16,808,171
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES		
Accounts Payable	\$ 796,814	\$ 606,155
NET ASSETS (Note 2)		
Net Assets without Donor Restrictions	\$ 15,042,072	\$ 16,198,493
Net Assets with Donor Restrictions	—	3,523
TOTAL NET ASSETS	15,042,072	16,202,016
TOTAL LIABILITIES AND NET ASSETS	\$ 15,838,886	\$ 16,808,171

BOSTON TEACHERS UNION STATEMENTS OF ACTIVITIES FOR THE YEARS ENDED AUGUST 31, 2022 AND 2021		
	2022	2021
SUPPORT		
Union Dues (Note 2)	\$ 9,746,725	\$ 9,735,121
Interest	3,120	5,367
Dividend Income (Note 3)	117,855	101,743
Capital Gain Distributions	241,911	121,097
Unrealized Gain (Loss) on Investments (Note 3)	(1,476,320)	488,969
AFT Salary Assistance Program	21,600	21,600
TOTAL SUPPORT	8,654,691	10,473,897
EXPENSES (Schedule 1)	9,811,112	8,176,489
INCREASE (DECREASE) IN NET ASSETS WITHOUT RESTRICTIONS (Note 2)	(1,156,421)	2,297,408
NET ASSETS WITH RESTRICTIONS		
EXPENSES		
AFT National Board Certification Stipends (Note 9)	3,523	3,707
(DECREASE) IN NET ASSETS WITH RESTRICTIONS	(3,523)	(3,707)
NET ASSETS AT BEGINNING OF YEAR	16,202,016	13,908,315
NET ASSETS AT END OF YEAR	\$ 15,042,072	\$ 16,202,016

BOSTON TEACHERS UNION STATEMENTS OF CASH FLOWS FOR THE YEARS ENDED AUGUST 31, 2022 AND 2021		
	2022	2021
CASH FLOWS FROM OPERATING ACTIVITIES		
Increase (Decrease) in Net Assets	\$ (1,159,944)	\$ 2,293,701
Adjustments to Reconcile Increase in Net Assets to Net Cash Provided by Operating Activities		
Depreciation	19,786	28,385
Unrealized (Gain) Loss on Investments	1,476,320	(488,969)
(Increase) Decrease in Accounts Receivable	(55,913)	(16,596)
Prepaid Expenses	(1,729)	(57,160)
Increase in Accounts Payable	190,659	17,761
NET CASH FLOWS PROVIDED BY OPERATING ACTIVITIES	469,179	1,777,122
CASH FLOWS FROM INVESTING ACTIVITIES		
Acquisition of Investments	(359,565)	(2,222,841)
Acquisition of Property and Equipment	(26,289)	(2,549)
NET CASH FLOWS USED BY INVESTING ACTIVITIES	(385,854)	(2,225,390)
NET INCREASE (DECREASE) IN CASH	83,325	(448,268)
CASH, BEGINNING	5,707,305	6,155,573
CASH, ENDING	\$ 5,790,630	\$ 5,707,305

SCHEDULE I BOSTON TEACHERS UNION STATEMENTS OF EXPENSES FOR THE YEARS ENDED AUGUST 31, 2022 AND 2021		
	2021	2020
Advertising	\$ 3,444	\$ —
Arbitration Fees	56,463	37,673
Audit Fees	57,549	45,229
Communications	255,961	176,711
Computer	47,911	43,390
Conferences, Conventions and Meetings	565,040	156,694
Consulting	24,720	—
Depreciation	19,786	28,385
Donations	399,367	172,632
Election	—	31,769
Expense Reimbursements		
President	5,163	4,936
Executive Vice-President	5,073	4,800
Secretary/Treasurer	6,398	4,824
Field Representatives and Director of Organization	42,800	40,600
Political Analyst	4,800	4,800
Committees and Others	12,447	12
Insurance		
Group Health	415,612	335,953
Teachers' Liability	34,987	35,888
General	15,829	15,514
Retired Teachers' Benefits	49,521	41,419
Legal		
General Union Issues	775,114	460,722
Teacher Assault Cases	1,100	—
Legal Settlement	168,330	—
Mailing and Machine Room	61,226	98,058
Office	115,588	30,492
Payroll Service	72,987	42,661
Payroll Taxes	197,870	193,841
Per Capita Payments		
American Federation of Teachers	1,574,953	1,561,064
AFT Massachusetts	1,374,869	1,393,023
State Labor Council AFL-CIO	95,006	96,344
Greater Boston Labor Council	30,755	31,216
Postage and Delivery	1,167	3,279
Printing and Bulletins	79,967	72,214
Professional Fees	17,325	6,197
Rent		
Office	126,507	121,350
Retirement Plan Contribution	200,732	195,060
Salaries and Stipends		
President	184,144	183,993
Executive Vice President	174,937	174,794
Secretary-Treasurer	165,729	176,048
Director of Organization	118,022	121,015
Director of Professional Learning	68,673	71,810
Field Representatives - Elementary	156,522	156,395
Field Representatives - Secondary	156,522	156,395
Field Representatives - Paraprofessionals	156,522	156,395
Field Representative - Political Analyst	156,522	156,395
Community Liaison Representative	12,734	12,724
Retired Teachers Coordinator	15,000	15,652
Assistant Retired Teachers Coordinator	11,250	22,165
Facilitators	6,480	27,582
Building Representatives	270,000	264,500
Negotiations	6,977	55,128
Editor	21,609	31,305
Office	399,423	409,418
Organizers	377,472	318,658
Other	207,284	—
Professional Learning Grant	750	—
Homework Helpers	26,149	46,514
AFT/BTU Teacher Leader	12,695	—
Teacher Inquiry	9,925	—
Telephone Workers	12,484	2,960
Scholarships	117,000	124,000
School Environmental Testing	—	24,670
Subscriptions	7,232	7,321
Taxes - Other	8,765	—
Telephone	32,753	43,448
	\$ 9,811,112	\$ 8,176,489



**BOSTON TEACHERS UNION
NOTES TO FINANCIAL STATEMENTS
AUGUST 31, 2022 AND 2021**

1. Organization and Nature of Activities

Boston Teachers Union (the Union) is a nonprofit labor union organized, funded and managed by current and retired school teachers and paraprofessionals working in the Boston area. Support is primarily derived from union member dues.

2. Summary of Significant Accounting Policies

Basis of Presentation

The financial statements of Boston Teachers Union are prepared on the accrual basis of accounting, and in accordance with the Financial Accounting Standards Board (FASB) Accounting Standards Update (ASU) 2016-14, *Presentation of Financial Statements of Not-for-Profit Entities*. As such, net assets are reported within two net asset classifications: without donor restrictions and with donor restrictions. Descriptions of the two net asset categories are as follows:

- **Net Assets Without Donor Restrictions** - Net assets available for use in general operations and not subject to donor restrictions are recorded as "net assets without donor restrictions." Assets restricted solely through the actions of the Executive Board are referred to as Executive Board designated and are also reported as net assets without donor restrictions.
- **Net Assets With Donor Restrictions** - Contributions restricted by donors are reported as increases in net assets without donor restrictions if the restrictions expire (that is, when a stipulated time restriction ends or purpose restriction is accomplished) in the reporting period in which the revenue is recognized. All other donor-restricted contributions are reported as increases in "nets assets with donor restrictions," depending on the nature of the restrictions. When a restriction expires, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the Statement of Activities and Changes in Net Assets as net assets released from donor restrictions.

Property and Equipment and Depreciation

The Union's policy is to capitalize tangible personal property with an estimated life of three or more years. Property and equipment are recorded at cost. Depreciation is provided on the straight-line method over the estimated useful lives of the assets.

Income Tax

The Union is a nonprofit organization that is exempt from both federal and state income taxes under Section 501(c)(5) of the Internal Revenue Code.

Accounting standards provide detailed guidance for the financial statement recognition, measurement and disclosure of uncertain tax positions recognized in an organization's financial statements. Under these accounting standards, the Union is required to recognize the financial statement impact of a tax position when it is more likely than not that the position will not be sustained upon examination. Management has evaluated its significant tax positions against the criteria established by these accounting standards and believes there are no such tax positions requiring accounting recognition.

The Union's Form 990, Return of Organization Exempt from Income Tax, for the years ending August 31, 2020, 2021 and 2022 are subject to examination by the IRS, generally for three years after they were filed. However, there are currently no audits for any tax periods in progress.

Use of Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

3. Investments

The Union held investments in mutual funds invested in equities and bonds that have short to long term maturities and in money market funds through Putnam Investments. The fair market value of the investments at August 31, 2022 and 2021 was \$9,326,638 and \$10,443,392, respectively. The following schedule summarizes the investment return and their classification in the statement of activities for the years ended August 31, 2022 and 2021:

	<u>2022</u>	<u>2021</u>
Dividend Income	\$117,655	\$101,743
Long Term Capital Gain Distributions	98,582	65,594
Short Term Capital Gain Distributions	143,329	55,503
Net Unrealized Gain (Loss)	<u>(1,476,320)</u>	<u>488,969</u>
TOTAL INVESTMENT RETURN	<u>\$M.116.7541</u>	<u>\$ 711.809</u>

4. Fair Value Measurement

Accounting standards define fair value as the price that the Union would receive upon selling an investment in a timely transaction to an independent buyer in the principal or most advantageous market of the investment and provides a framework for measuring fair value. That framework provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (level 1 measurements) and the lowest priority to unobservable inputs (level 3 measurements). Inputs may be observable or unobservable. Observable inputs are inputs that reflect the assumptions market participants would use in pricing the asset or liability developed based on market data obtained from sources independent of the reporting entity. Unobservable inputs are inputs that reflect the reporting entity's own assumptions about the assumptions market participants would use in pricing the assets or liability developed based on the best information available in the circumstances.

The three levels of the fair value hierarchy are described below:

Basis of Fair Value Measurement:

- Level 1* Unadjusted quoted market prices in active markets for identical assets or liabilities at the reporting date.
- Level 2* Observable inputs other than Level 1 unadjusted quoted market prices such as quoted market prices for similar assets or liabilities in markets, quoted prices for identical or similar assets or liabilities that are not active, and inputs other than quoted prices that are observable corroborated by observable market data.
- Level 3* Unobservable inputs that are supported by little or no market activity.

A financial instrument's level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement.

Following is a description of the valuation methodologies used for assets measured at fair value. There have been no changes in the methodologies used at August 31, 2022 and 2021.

Putnam Dynamic Asset Allocation Conservative Fund - A: Valued based on yields currently available on comparable securities of issuers with similar credit ratings.

Putnam Government Money Market Fund - A: Valued based on yields currently available on comparable securities of issuers with similar credit ratings.

The following tables present by level, within the fair value hierarchy, the Union's investment assets at fair value, as of August 31, 2022 and 2021. Investment assets are classified in their entirety based upon the lowest level of input that is significant to the fair value measurement.

Assets at Fair Value as of August 31, 2022

<u>Description</u>	<u>Fair Value</u>	<u>Quoted Prices In Active Market for Identical Assets (Level 1)</u>
Dynamic Asset Allocation Conservative Fund A	\$ 7,309,623	\$ 7,309,623
Government Money Market Fund - A	<u>2,017,015</u>	<u>2,017,015</u>
	\$ 9,326,638	\$ 9,326,638

Assets at Fair Value as of August 31, 2021

<u>Description</u>	<u>Fair Value</u>	<u>Quoted Prices In Active Market for Identical Assets (Level 1)</u>
Dynamic Asset Allocation Conservative Fund A	\$ 8,432,446	\$ 8,432,446
Government Money Market Fund - A	<u>2,010,946</u>	<u>2,010,946</u>
	\$ 10,443,392	\$ 10,443,392

5. Risks and Uncertainties

The Union invests in various investment securities. Investment securities are exposed to various risks such as interest rate, market, and credit risks. Due to the level of risk associated with certain investment securities, it is at least reasonably possible that changes in the values of investment securities will occur in the near term and that such changes could materially affect the amounts reported in the statement of financial position.

6. Transactions with Related Entities

The Union rents office and conference room space from a related entity, B.T.U.H.W.F. Building Corp. on a tenant-at-will basis under the terms of a lease which ended September 1, 2005. The yearly base rent is adjusted annually on September 1st to correspond to the change in the "Consumer Price Index for all Urban Consumers for Boston, MA, All Items" during the twelve-month period which ended in the previous July. B.T.U.H.W.F. Building Corporation is responsible for all utilities, including water and sewer, and repairs to the rented space. Payments to B.T.U.H.W.F. Building Corporation totaled \$126,507 and \$121,350, respectively, for the years ended August 31, 2022 and 2021.

continued on page 10

BTU Secretary-Treasurer's Report...

continued from page 9

7. Retired Teachers' Benefits

Effective July 31, 1987, dues paid to the Union by retired teachers and retired paraprofessionals for two consecutive years qualify them to participate in eye care benefits. Eyeglasses will be provided not more frequently than once in any 24-month period. Full details of benefits and limitations are described in "Guidelines for Retirees Eyeglass Benefit".

8. Retirement Plan Contribution

The employees of the Union participate in a defined contribution retirement plan. The Union's contributions are equal to 10% of the annual salary of participating employees plus administration fees. The Union's contributions to the plan totaled \$200,732 and \$195,060 respectively, for the years ended August 31, 2022 and 2021.

9. Advertising

Advertising costs are charged to expense when incurred. Advertising expense was \$3,440 and \$0 for the years ended August 31, 2022 and 2021, respectively.

10. AFT National Board Certification Grant

In July 2019, the Union received a National Board Certification grant from the American Federation of Teachers in the amount of \$20,865 to provide professional facilitator training and support to the Union Expenses related to this grant incurred in the fiscal years ended August 31, 2022 and 2021 totaled \$3,523 and \$3,707, respectively.

11. Defense Fund Grants/Legal General Union Issues

For the fiscal years ended August 31, 2022 and 2021, the Union received \$107,217 and \$65,892 respectively, in defense fund grants from AFT and AFT Massachusetts to help defray legal costs incurred in defense of BTU members. General Union Issue legal fees, net of these grants, incurred in the fiscal years ended August 31, 2022 and 2021, totaled \$775,114 and \$460,722, respectively.

12. Legal Settlement

In early 2021, the Internal Revenue Service commenced an audit of the Boston Teachers Union #66 Money Purchase Pension Plan ("the Plan") which is a pension plan for employees and officers of the Boston Teachers Union. In the course of this audit, it was discovered that during the plan year ended August 31, 2019, the Plan permitted a substantial distribution of one participant's account without first obtaining the correct paperwork, resulting in an improper distribution. As a result of the improper distribution, the IRS and the Plan reached an agreement in March 2022 on the terms of settlement. Pursuant to the settlement, as the Plan is an individual retirement account plan, the Boston Teachers Union, as the owner of the Plan, made a lump sum payment of \$168,330 on March 25, 2022. The Union was reimbursed \$72,000 from the Union's insurer in connection with the audit.

13. Liquidity

At August 31, 2022, financial assets and liquidity resources available for general expenditures within one year of the Statement of Financial Position date comprise the following:

Cash	\$ 5,790,630
Investments	9,326,638
Accounts Receivable	411,789
Prepaid Expenses	239,586
	\$15,768,643

As part of the Union's liquidity management, it has policies to structure its financial assets to be available as its general expenditures, liabilities and other obligations become due.

14. Evaluation of Subsequent Events

The Union has evaluated subsequent events through April 19, 2023, the date which the financial statements were available to be issued.

Teach Earth Fellowship: K2 teacher Elizabeth Self Gets Ready to Count Some Caterpillars

By Elizabeth Self

I found out about the Earth Watch organization and the Teach Earth fellowship through the BTU professional development newsletter. Earth Watch is a group that helps scientists find willing hands to help them complete their field studies by matching researchers with teachers who want to learn more about scientific field work so that they can enrich science instruction in their classroom. The Teach Earth fellowship helps teachers access these expeditions by awarding grants to cover the program fees and associated travel costs.

I worry a lot about climate change, and I see the effects of it on my students here in East Boston daily. I wrote to Teach Earth in my application about how I wanted my students to experience science in a more hands-on way so that they could understand, in a tangible and age-appropriate way, how the Earth needs care and what they can do to help. I was lucky enough to be awarded with a fellowship for this summer.

This July, I am going to fly out to Nevada and join a group of like-minded teachers to count caterpillars and collect evidence of the parasites that control caterpillar populations there. In addition to completing the field research, our itinerary includes activities designed in which we meet in grade-level groups and discuss how we can "flip" our experiences into learning opportunities for students. The goal is to leave having contributed to original research, to document the changes to our living world due to climate change, and to have a plan ready for students to conduct their own research experience, as well.

I hope to report back on my experiences after I return!

I am grateful for the opportunities that the BTU in general and the professional development newsletter in particular have provided me since I began teaching here in Boston. I would encourage anyone who is considering this program to send me any questions they have about it in the fall. I can be reached at mself@bostonpublicschools.org



Elizabeth Self

About Earthwatch:

Earthwatch's long-running Teach Earth fellowship, launched in 1975, is one of the few programs in the country that embeds teachers with world-class scientists on active research expeditions. By taking part in meaningful, hands-on research in the field, teachers return to school with a fresh perspective and are better able to engage their students on topics of science and environmental stewardship.

Teach Earth fellows step out of the classroom for 7 to 14 days and work alongside scientists to study nature, learning real-world research protocols, and recording observations and measurements in the field. They collect data that underpin scientific progress and can, over time, change the world. In the evenings, teacher fellows work together to brainstorm new lesson plans that will bring science to life back in the classroom.

Apply at earthwatch.org/education

Retired Teachers Chapter Joan Devlin, RTC Secretary Retirees Year in Review

Thank you so much!

The election for the BTU and RTC officers was held with members voting both in person and by mailed ballot. The RTC officers were uncontested. **Marilyn Marion** was re-elected to the RTC Chair, **Roz Avant** to the RTC Vice Chair, **Mae Bishop**, who was appointed to take the position of Acting Treasurer when Anne Broder became ill and unable to continue in that position, was elected as Treasurer, and **Joan Devlin** continues as RTC Secretary.

We thank all of the retirees who participated in the election and look forward to the upcoming term to continue our work for a more adequate COLA base for our pensions, to provide additional opportunities to bring members together to fight for continuation of our health care benefits as well as additional opportunities for social gatherings that keep our colleagues connected to the union and to each other.

Help

There is work to be done. We ask for your ideas of what the RTC could offer that would attract more members to participate in fighting for our retirement and health benefits, our meetings, and luncheons.

What would you like to see as part of our Retiree program? Drop us an email, snail mail, text or telephone call to the RTC office with your suggestions. The RTC office hours are Wednesday and Thursday from 10 am-2 pm. And you can email Marilyn at mmarion@btu.org or Roz at ravant@btu.org.

Are you receiving the RTC e-bulletins?

If you are not receiving the RTC e-bulletin it is because we do not have your email address. Please contact the office and let us know what your email address is and we will add it to the list. We do not share your information with anyone.

This bulletin allows us to keep in touch with you about the latest information in the fastest possible way.

Recruiting members new and old

We want all of our retirees to join the RTC. You may be a very recent retiree or perhaps you didn't join because you didn't know you had to make a new application to belong, you didn't know we were here or you meant to do it but forgot.

We want everyone who receives a pension from the City of Boston because they worked in the Boston Public Schools and belonged to the Boston Teachers' Union to join us. You can fill out your application on-line at btu.org/retirees or contact the Retirement office in person or by phone. You will need to know your pension number that can be found on your pension check or obtained from the Boston Retirement Board. All are welcome.

In this post pandemic world, it is wise to review where we have been this year. As always, life deals us blows that are difficult and could be disastrous if we did not have such strong leadership at the committee level. We lost both of our Legislative Committee co-chairs. **Sandy Carle** passed away, **Larry Connolly's** sister passed away and Larry resigned his position as the Legislative Chair and member of the Executive Board. We miss their wisdom and

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AAPI Book Give-Away

May was Asian American and Pacific Islander (AAPI) Heritage Month! Part of our celebration was the BTU AAPI Book Event where we distributed hundreds of books with AAPI authors and characters. The event took place at the BTU Hall on May 20 from 8:30 to 10:30 a.m. thanks to a grant from AFT and in partnership with FirstBook. We were happy to be joined by two local AAPI authors: **Vincent Yee** and our very own **Tracy Guan** of the Quincy Elementary School who were recently on the Kelly Clarkson show.



The Quincy Elementary School's Tracy Guan reads one of her books to children.



Vincent Yee, Brenda Chaney, Tracy Guan



Retirees Year in Review...

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presence. No one can replace them.

The committee is now chaired by **Janey Frank** and she is carrying on the great tradition established by Sandy and Larry. Janey served as the secretary of the legislative committee and her experience and knowledge meant that the committee could continue to pursue advances in COLA base improvement and getting the City and the Retirement Board to adopt the law allowing a one-year raise in the statutory COLA increase to 5%. She worked hard to connect other unions to the effort to jointly act to pressure the City to increase the COLA base. As we go to press, we have not yet succeeded this year, but we have established the idea that actively pressing for raises strengthens the position of every union. We had the unanimous support of the City Council and through the efforts of **Janey Frank** and other unions, we will continue to educate the Mayor on the need for raising the COLA base.

And that means we need you to help. Join the committee, sign up to write letters or to testify at hearings of the Mayor or City Council or Retirement Board Members in support of the BTU/RTC's position.

We met in person

The social committee outdid themselves this year. The committee headed by **Mary Jo Murphy** and **Annemarie Aducci** arranged the Fall luncheon, the Fall Business meeting, the Jazz Brunch, the Spring Luncheon and the Spring Business meeting. Each was a success.

Venezia opened its doors to us for two luncheons. In the Fall (on a Monday when the restaurant is usually closed) and again in the Spring. We note that good food and company was enjoyed by all.

In December, we held the Jazz Brunch at Florian Hall. The social committee found the perfect caterer and our Jazz Band performed a miracle and had the entire place up and dancing. The Marines sent two wonderful young men to retrieve the incredible number of gifts from the Brunch participants. The Jazz Brunch is a great way to kick off the holiday season.

The two business meetings returned to the BTU hall and refreshments were served to start the meetings. We heard excellent speakers at both meetings, including a presentation by TruHearing, the company that provides

hearing aid services for our members. They provided members an opportunity to take a brief hearing test.

At each of the luncheons, we missed our good friend **Mary Gaughan** who always ran the half and half raffle. But our members jumped in to help and the raffle continues to be a tradition at the luncheons.

Pack your bags

Travel opportunities are once again possible check the website or our Facebook page for information about upcoming trips. Whether it is a boat trip to the Encore Casino or a train to Mount Washington, we are traveling again.

Stay in touch

Office Hours for the RTC are Wednesday and Thursday from 10 a.m. to 2 p.m. Call us if we can provide information or assistance with our benefits or programs or to update your information.

We're Learning Here!

By Amika Kemmler Ernst, Ed.D.



(Amika Kemmler Ernst is a retired BPS New Teacher Developer with extensive experience as a classroom teacher, curriculum developer, and graphic artist. Her "We're Learning Here" Project features images of everyday learning in our public schools, along with the words of the students pictured.)

Joyce Kilmer K-8 School

The Joyce Kilmer K-8 School serves about 400 students at two sites in West Roxbury, surrounded mostly by single family homes with a distinct suburban feel. Both buildings are tight on space, however, with tiny basement "cafeteria" areas and no gym.

In a paved area in front of the Lower Campus, P.E. teacher **Shannon Wyman** demonstrates how to throw and catch while her K1 students practice their stance, arm movements, and how to cup their hands to receive a ball. Inside, **Mike Ballasalle** and **Chuck Roderick** help first and second grade ABA students learn vowel sounds. In **Paul Kearnan's** third grade class upstairs, students work in small groups as they try to persuade classmates that their favorite season is the best, using sentence starters to "keep the conversation going."

Two miles away, at the Upper Campus building, fourth graders in **Shandalea Abdul-Hadi's** class are reading and discussing themes in *The Hope Chest*. Across the hall, **Danielle Moran's** fifth grade students take turns teaching their classmates about science topics they've researched, such as sound or shadows, complete with slide show presentations and assessment questions. After a lesson on hip hop, **John Glennon** takes

his sixth grade music class outside to practice keeping a synchronized rhythm with bucket drums!

The Kilmer's ESOL teacher **Beth Matlin** says: "I appreciate the fact that my colleagues truly care about each other's social and emotional well being. We check in with each other and support each other. It feels good to know that if I have a bad day, I can count on a colleague to check in and vice versa."

A string of cut-out footsteps lines the stairway walls heading to middle school classrooms – a "Marathon of Kindness" – decorated and labeled with student notes of appreciation for teachers and classmates. I hope YOU feel appreciated as this challenging year comes to a close!

Amika 
Amika Kemmler-Ernst, Ed.D.
amika45@gmail.com



I am painting a flower different colors in art with Ms. Boylan. We are learning how to have empathy for other people by being respectful, listening, and working hard.

Franklin Brea, Gr. 6 (ABA) with help from Ms. Smith-Munnelly



This is in Spanish class and Ms. Jeannette was helping me with an assignment on Google Classroom about naming foods in both languages. I've learned that Spanish-speaking people from different Caribbean countries use different words than my Dominican family uses for the same thing.

Jose Estrella, Grade 7

Ms. Schindler is helping me find a book to research deforestation in order to write a persuasive essay about it. Currently we've been learning how to teach a science lesson to our classmates, and I will be presenting mine on mixtures and solutions soon. I've learned we need to introduce the topic, make it interesting, and check what the students remember.

Jacoby Ross, Gr. 5



We're learning to add and subtract fractions in Math. In this picture, Zainab was helping Ann solve a problem on adding mixed numbers. In Social Studies, we learned about Spanish explorers back in the 1500s who killed or enslaved native people of the Caribbean while looking for gold and glory.

Ann Wall & Zainab Mustapha, Grade 4



We are in our discussion groups, sharing our favorite seasons and trying to convince our classmates ours is best. We're practicing using "talking points" to keep the conversation going. We've learned a lot this year, for example that Boston Latin School was the first public school – but only for boys!

Mr. Kearnan's students, Grade 3



We are in P.E. class with Ms. Wyman. We are learning how to throw and catch a ball.

Ms. Kern's students, K1



This is during "text talk" time and we were taking notes about a book on pollination. One side of our graphic organizer is what we learned and the other is for questions. We've learned that bats pollinate cactus flowers and bees are very effective pollinators – without them, nothing else could live!

Emma Conway & Rosalia Dore, Grade 2



We're working on math input/output problems with Ms. Moran. We've learned "The Big Seven" strategy for multiplying and dividing numbers. Nick learned how to focus better while reading, and we're all reading more historical fiction this year. In Social Studies we learned about how our country began and that the Declaration of Independence was written by Thomas Jefferson.

Danny Shedd, Nick Sullivan, & Damian Lopez, Grade 5

We were studying words with Ms. Feeney, showing short and long vowel sounds with our hands. We're also learning about vowel combinations and taking apart the letters in "trick" words that are hard to sound out.

Gabriel Tenney, Jack Corley, & Gavin Shea, Grade 3



I am sounding out words with Ms. O'Connor. I am learning about letters and sounds and words.

Leela Sweeney, K2