



## **REPORT TO THE MSEA REPRESENTATIVE ASSEMBLY, 2023-2024**

### **Sean Johnson, Executive Director**

This past year has been full of significant successes and changes in our state and for our union. With great thanks to our outgoing president and vice president Cheryl Bost and Theresa Mitchell Dudley, we prioritized the role and importance of union voice and actions at all levels of bargaining, policy development, lawmaking, and union organizing. During the final months of their terms, MSEA reached a record high in union membership totals as we continued to organize new locals and improve member engagement. This year also brought the onboarding of a new officer team of President Paul Lemle and Vice President Nikki Woodward. Next year's accomplishments report will better reflect on the new energy, optimism, and successes of their work to push for a greater focus on organizing for power.

The reports that follow this page reflect the incredible leadership of the MSEA Board, management team, and staff of our strong union. We have made great strides in our MSEA Strategic Plan, including our collective work to move the needle for students, parents, communities, and members in the specific mission areas of building strong and stable locals, leaving the professions, and developing and sustaining a culture of organizing. Specifically, the strategic objectives include:

- Advancing racial and social justice,
- Building and using power to increase support for public education,
- Empowering and elevating educator voice,
- Enhancing organizational capacity,
- Recruiting, engaging, and organizing a diverse membership,
- Supporting professional excellence; and,
- Ensuring the ongoing operations of MSEA are strong and sustainable.

The MSEA Strategic Plan was adopted for 2020-2025 so the work of the future governance and staff teams, along with member input and support, will move towards updating and launching a new plan in the years ahead. That strategic plan development will be done in earnest more in the 2025-2026 membership year.

### **The Year Ahead**

Organizing for power will strengthen our union during continued challenges to defend and improve the Blueprint for Maryland's Future, advocate for needed revenue at the state and local levels to deliver better contracts for our members and outcomes for students and communities, and continue to be a growing union that organizes new locals and new members and takes on big challenges.

If you have specific questions concerning any part of this report, please do not hesitate to contact the executive director's office or email me at [sejohnson@mseanea.org](mailto:sejohnson@mseanea.org).



## **CENTER FOR ORGANIZING AND ADVOCACY**

In addition to the center's regular work of developing and holding engaging conferences and trainings, supporting MSEA's committees, member organizing and recruitment, negotiations and member advocacy, and statewide support for MSEA's locals, five areas are worth highlighting:

### **Collective Bargaining**

At the MSEA 2024 Summer Leadership Conference, Collective Bargaining 1 and 2 were offered. Participants from 14 locals attended Collective Bargaining 1 and eight locals attended Collective Bargaining 2. Career ladder negotiations were a priority this past year for certificated units to meet requirements of the Blueprint for Maryland's Future. All locals reached agreements on career ladder salaries and are moving forward with implementation. The ESP Bargaining Goals document with model contract language was expanded from 11 to 23 topics this year to include new language on seniority rights, voluntary transfers, promotions within the unit, reclassification, workload, temporary assignment, protecting against privatization/subcontracting, sick leave usage, legal summons, ParaPro and CDA assessment reimbursement, professional development, and job protected alternative leave.

### **New Unit Organizing**

On October 27, 2023, the Wor-Wic Community College Faculty Association (WWCCFA) won representation via card check under the new collective bargaining law (House Bill 894 passed in 2021) for community college employees and became the second community college to successfully affiliate with MSEA. Active organizing committees are working towards card check on two other campuses currently and exploratory work is underway on one other campus. The COA and legal teams provided collective bargaining training for both WWCCFA and the Union of Harford Community College Faculty (UHCCF) as they prepared to engage in bargaining for their first contracts.

We are also pleased to welcome the Calvert Association of Supervisors and Administrators to the MSEA family as our newest administrators and supervisors (A&S) unit.

### **Racial Social Justice Work**

During the past year, 14 locals were represented at the Racial Social Justice Summit and five locals were engaged in the Minority Leadership Cohort training. In addition, seven locals were represented at the Women's Leadership Cohort training. For the second time, the Martin Luther King, Jr. Celebration and the Racial Social Justice Summit were held on the same day. The joint event engaged 192 attendees, which was the highest attendance since the pandemic. In the first full year of the Racial, Social, and Economic Justice (RSEJ) targeted locals program, two locals carried out their plans for the year. In addition, as the result of MSEA grant funding and in coordination with multiple MSEA centers and local leaders, the locals in the west conducted an "Educational Equity and Our Schools Summit," which was attended by 60 members.



### **Developing and Supporting Strong ESP Locals**

The MSEA ESP Bill of Rights campaign continued strong in FY24 with a year-round organizing campaign, including the second summer organizing campaign. The summer campaign engaged 15 ESP member organizers and two full-time ESP member coaches. The member organizers knocked on 4,324 doors and had 1,142 one-on-one conversations, which resulted in 746 ESP Bill of Rights endorsements, 212 membership sign-ups, and 78 leadership identifications. In addition to the summer campaign, 14 ESP organizers worked during the school year to engage with members and potential members. The ESP organizers had 1,830 one-on-one conversations, recruited 98 new members, and added 1,464 ESP Bill of Rights endorsements! MSEA staff across multiple departments administered and supported all aspects of these successful programs.

### **Aspiring Educators**

The Aspiring Educator (AE) program prioritizes supporting aspiring educators and early union engagement as part of its broader effort to address the national teacher shortage. Seventy-eight percent of attendees at the aspiring educator lobby night were first-time participants on February 19, demonstrating a growing engagement in advocacy efforts. One standout moment from the past membership year was an aspiring educator member testifying to strengthen community colleges as a viable pathway to licensure, underscoring the importance of accessible and diverse routes into the profession. While these milestones mark significant progress, much more work is needed to disrupt the teacher shortage crisis, and the AE program remains committed to advancing solutions that empower future educators.

### **The Year Ahead**

The center will focus on establishing community college locals, membership recruitment, ESP Bill of Rights organizing, and assisting locals to embrace and create racial and social justice change through their local strategic plans and the targeted locals work as a part of the MSEA strategic priorities. Our team will continue to support and collaborate with other departments around the ongoing implementation and associated negotiations impact of the Blueprint for Maryland's Future. We also look forward to hosting the NEA Zone 1 Organizing Institute in Maryland in the summer of 2025 (postponed from 2024).

#### **Paula Voelker**

Assistant Executive Director, Center for Organizing and Advocacy

#### **Josh Ardison**

Managing Director, Center for Organizing and Advocacy

#### **Elaine Crawford**

Managing Director, Center for Organizing and Advocacy

#### **Tamara Robinson**

Managing Director, Center for Organizing and Advocacy



## **CENTER FOR PUBLIC AFFAIRS**

The last year was focused on legislative work and advances in Annapolis, the key elections facing us in 2024, and building out some of our communications infrastructure. The Public Affairs team has stayed focused on empowering and delivering wins for our members, whether at the ballot box, in the legislature, or in the realm of public opinion. Four specific areas are particularly noteworthy:

### **Campaign 2024**

We had a highly successful primary election, winning more than 80% of races overall and 100% of races where we spent PAC dollars on the independent expenditure side. These wins included several member candidates for boards of education, such as Chad Wilson in Frederick, Natalie Zimmerman in Montgomery, and Robin Spickler in Washington, and a clean sweep in the Republican primaries in Cecil County, including defeating the sitting county executive who had proposed deep cuts to local public school funding. We will look to build on these primary successes in the critically important general election to come.

### **Legislative Session Wins and Follow Up**

The 2024 legislative session was a successful one for Maryland's educators and MSEA, with victories that included passing the Freedom to Read Act to prevent politicized book bans; several bills that expand policies to attract and retain more educators; passing groundbreaking Grow-Your-Own (GYO) legislation to support ESP who want to become teachers; and, fully funding the Blueprint for Maryland's Future. In addition to the GYO legislation, bills to expand certification pathways while maintaining high standards and to broaden eligibility for stipends to aspiring educators who begin their studies at community college will help address the ongoing educator shortage. We also delivered wins for community school families through a new rental assistance fund to combat housing insecurity, as well as for pre-k paraeducators in public programs by exempting them from a requirement to pursue new degrees if they have at least five years of experience in a publicly funded pre-k classroom by July 1, 2024. This reform honors the experience of educators and helps retention efforts. While it didn't pass, we made progress on, and had good opportunities to educate legislators, regarding anti-privatization legislation, highlighted by a strong showing at ESP Lobby Night for that bill. Members engaged in the legislative session by testifying on bills and participating in lobby nights and visits. The western Maryland lobby night was especially successful, with five of our locals participating.

In the run up to the 2025 session, the lobby team has been supporting the ESP Workgroup, including research and development of policy proposals, as well as working with members serving on the Blueprint Special Education Workgroup to ensure educator voice is heard, and tracking the work of the State Board of Education, the Professional Standards and Teacher Education Board, and the Accountability and Implementation Board.



### **Communications Infrastructure**

We built out our digital presence on several fronts over the last year, including developing a more responsive and nuanced targeting and analytical tracking system, launching a regular series of videos, and creating a number of mini-documentaries highlighting the organizing and professional work of our members. We revamped our membership materials—as is typical during a change of officers—and also included Spanish language translations of some materials. We also developed a range of primarily digital templates and supporting infrastructure to increase efficiencies of planning and event implementation which can be used across HQ departments.

### **Research Projects**

We conducted several significant research projects this year in addition to our annual member survey. We held virtual focus groups in April with building representatives from across the state, which provided a great deal of highly specific and useful feedback in our ongoing efforts to support and recruit building reps as essential links in worksite-level communication and power-building. We worked with NEA to survey our members on their print publication preferences, which the communications team will consider along with digital analytics from web and social media posts on ActionLine to inform any strategic changes to our approach moving forward. Finally, we also worked closely with NEA to roll out a robust voter model to help us better target pro-education voters in local elections.

### **The Year Ahead**

The potential ramifications that the 2024 elections may have on our Public Affairs work narrowly and our union work more broadly are innumerable. No matter the results, the Public Affairs team will be prepared to support and empower our members for the fights and advances ahead.

### **Adam Mendelson**

Assistant Executive Director, Center for Public Affairs

### **Samantha Zwerling**

Managing Director, Political and Legislative Affairs

## **CENTER FOR LEGAL AFFAIRS**

The Center for Legal Affairs, collectively, opened 211 total cases in FY24. We represented employees and local affiliates in various employment-related matters before local boards of education, arbitrators, courts, and the new Public Employee Relations Board (PERB). Additionally, we have continued to prepare ActionLine articles for members, conduct MSEA's internal election, and prepare and coordinate responses related to MSEA staff grievances as well as to local affiliate personnel matters. Other significant developments to highlight are as follows:

### **Advocacy**

With the unprecedented teacher shortage, negotiations have incorporated compensation for class coverage in the case of absent or vacant teacher positions. With such provisions, there has been an increase in arbitrations over the



administration of the language with local boards routinely finding ways to avoid payment. Some cases were favorably decided or resolved with significant payments to bargaining unit members. There has also been an increasing concern over violent students, particularly students receiving special education services, resulting in significant physical injuries and fear for safety on the part of staff. The law has not supported the removal, restraint, or imposition of discipline for such behaviors so we have attempted to seek alternative avenues, such as contractual remedies and MOSH which requires a safe work environment. In the end, many teachers simply take a leave of absence, paid sick leave, or retire. We are also monitoring the impact on members and school system budgets with the passage of the Child Victims Act, removing the statute of limitations on civil damage suits for survivors of child sexual abuse.

Fortunately, or unfortunately, our high expectations for the PERB have not panned out. It is of significant concern that the Board dismissed an unfair labor practice complaint filed in Howard County. The complaint stemmed from the county board's refusal to negotiate salaries until after the superintendent had issued his budget to the board of education leaving the parties to negotiate to a pre-determined outcome. While the complaint was timely filed, a hearing was not held in a timely manner; and because the parties reached an agreement, the complaint was dismissed. This occurred, despite the fact that the exact same scenario will play out in many locals again and again. The matter was ripe for a declaratory ruling, but the PERB was incapable of committing to the conduct of a hearing to render such a decision. We will look for opportunities to impact the composition of the PERB through future new appointments.

Finally, we continue to focus on building strong locals by providing training in the areas of fiduciary responsibilities and collective bargaining. We have also focused on providing for targeted training for our UniServ staff, including Tom Stern's Advocacy Training, and trainings through the Center for Organizing and Advocacy (COA) that focus on bargaining strategies, tactics, and drafting language. We have specialized the trainings for community college bargaining teams, which we teamed up with COA to conduct.

### **The Year Ahead**

Externally, we anticipate that MSEA's new appointee to the PERB will balance the board with a strong labor practitioner. We will continue to monitor cases and put forward only those that are likely to result in favorable outcomes. Internally, we will continue to focus on the development of supports and resources for our local affiliates in the area of bargaining, especially negotiations relative to implementation of the Blueprint as well as Maryland's paid family leave program.

### **Kristy K. Anderson, Esq.**

General Counsel



## **CENTER FOR EDUCATION POLICY AND PRACTICE**

The Center for Education Policy and Practice (CEPP) aims to educate, elevate, and empower members to support and prepare diverse students through high-quality policy guidance and professional development. This year, we have continued to successfully meet our goals by providing statewide support in policy implementation, advocacy, and engaging conferences and trainings aligned with MSEA's strategic goals. Over 2,000 members took advantage of these professional and policy learning opportunities in FY24.

### **Advocacy and Policy Implementation Guidance**

CEPP conducted policy briefings and affiliate road trips, ensuring MSEA stakeholders were updated on local education agencies' implementation plans required by the Blueprint. We maintained strong relationships with state agencies to keep MSEA stakeholders abreast of new guidance and policy shifts. Working closely with the MSEA president, we advocated for MSEA's positions on education regulations and policies impacting members at the state board and the Professional Standards Teacher and Education Board. This resulted in significant improvements to the originally proposed COMAR changes. We continue to develop trainings and provide direct guidance on laws, policies, and regulations, focusing on critical issues like Blueprint and educator licensure pathways.

### **Professional Development**

Throughout the year, we utilized MSEA's Professional Learning Portal (PLP) to equip our diverse membership with essential resources for professional growth and policy comprehension. In partnership with Trinity Washington College and VESI, we offered discounted courses for college credit and supported educators pursuing certification renewal. We partnered with NEA to provide Praxis and ParaPro support. CEPP offered in-person professional development (PD) workshops and courses throughout the year, including C.A.R.E., Yes You Can and Trauma, social-emotional learning, and Verbal De-Escalation. We also utilized NEA grants to create PD hubs for education support professionals and certificated members that began in 2023. We will continue to support the personal and professional growth of members to meet the needs of diverse students and facilitate change through our statewide conferences.

### **Cross-Departmental and Community Support**

CEPP collaborated with various MSEA centers to enhance policy understanding and support legislative efforts. We co-developed policy one-pagers with Public Affairs. We collaborated with COA to support ESPs and early career educators by providing PD at the following conferences: Racial and Social Justice, ESP professional development, Summer Leadership Conference, and Maryland Counseling Association Conference. We worked with local historically Black colleges and universities (HBCUs) to strengthen the aspiring educators' program by providing PRAXIS support. Our efforts have enabled us to develop relationships with colleges and universities, transforming conditional educators into licensed educators, and addressing education attrition. We also worked with Legal Affairs on Blueprint and certification pathways with statewide and local work implications and organized the center's first collaborative policy and practice forum.



## **The Year Ahead**

Looking forward, CEPP will continue to provide guidance for locals as they develop their career ladders and community school programs. We will assist locals in designing their Peer Assistance and Review Blueprint program. MSEA's PLP will continue to offer new learning opportunities: courses, micro-credentials, and self-paced trainings as we strive to meet members' needs in professional development and policy navigation.

## **Géraldine Duval, MBA & NBCT**

Assistant Executive Director, Center for Education Policy and Practice

## **CENTER FOR BUSINESS, POLICY, AND OPERATIONS**

The Center is responsible for the day-to-day operations of the business and administrative areas of the association. This encompasses the major areas of accounting, treasury management, risk management, regulatory reporting, internal controls, membership, information technology, and property management. We are also engaged in a process of continual procedure and control improvements to become as efficient and effective as possible.

### **Financial Statement Reporting and Regulatory Compliance**

During FY24 we continued to enhance electronic processing essential to the efficient preparation of accurate financial statements and regulatory filings. Electronic processing and reporting allow for the automation of processes, enhancement of security, and data comprehensiveness that allows the data to be available to staff and management in real time. Both staff and management can access the systems remotely, allowing increased efficiency of report submission, review, and approval. Additionally, both systems provide valuable analytical reporting features to management. We continually analyze the financial statements and monitor the chart of accounts to ensure we are providing accurate and useful financial information to management and the board. Continued efforts were made in FY24 supporting the fiscal health of local affiliates.

### **Membership**

In FY24, MSEA realized a gain of 1,529 members, or 2.2%. One factor driving this growth was 2.3% growth in ESP membership, reversing two years of losses. Additionally, we are seeing long-term results on local recruitment engagement efforts led by the Center for Organizing and Advocacy. We continue to implement system and process improvements that will provide more accurate, timely and relevant data to support the Center for Organizing and Advocacy in their efforts to organize and retain members.

### **Facility Management**

In Fall 2023, the MSEA headquarters renovation was completed and staff reoccupied the building. MSEA's training center became operational during FY24 hosting several events and trainings. We continued to refine the building's operating systems and





technology which is ongoing and will continue into FY25. Finally, necessary maintenance and improvements to the parking lot and deck were completed.

### **Information Technology**

MSEA continues to receive favorable reports from our cyber security insurance carrier and our outside security vendor, both of which perform security testing of our network and systems. The data center server farm was upgraded with new battery backup devices to ensure business continuity. Finally, advanced VPN technology was installed at headquarters and rolled out to all users to complement our network security posture and protect our member data.

### **The Year Ahead**

We will continue to provide support to local affiliates offering training and assistance related to regulatory compliance and fiscal health. Time and effort will be spent ensuring alignment of the budget with our strategic objectives. Constant attention will be paid to all threats that aim to compromise our network, steal members' dollars, and extort our membership data. We strive to safeguard all assets, invest wisely, and prudently spend precious dues dollars. The membership and data team will provide ongoing support and training to support the routine use of data in membership recruitment and engagement activities at the state and local level. Finally, we hope to retain and develop the talented staff we were able to recruit and hire to assist in the successful operations of the BPO center.

### **Sarah Wilkerson**

Chief Financial Officer

### **Peter Witzler**

Manager, Membership and Data

## **HUMAN RESOURCES DEPARTMENT**

The transition back to an in-person environment late last year was a welcomed change. The balancing of the new normal along with maintaining standard programs and addressing new employee expectations proved to be challenging and rewarding. The evolving workplace climate continues to challenge our efforts in providing attractive career opportunities, retaining employees through charting a career path, committing to continually diversify the workplace with the best talent, and providing a competitive compensation and benefits package. Here are a few noteworthy highlights of the past year.

### **Administration and Operations**

Human Resources continued to host the staff training series which consisted of baseline training, specialized group trainings, health and wellness events, and HR manager participation in an advocacy training coordinated by COA. The department prepared the FY 23/24 Affirmative Action Plan (AAP). The AAP provides an overview of the demographic make-up of the MSEA workforce and the comparison to Maryland's labor pool, as reported by the most available U.S. census data. To support team relationship building, HR hosted the biennial employee wellness event and participated in a BPO teambuilding activity. With the return to HQ, we committed to



enforcing the document retention policy, and with this goal in mind, the resulting benefits include reduced costs, improved security, easier and faster access to data, and a reduction in clutter.

### **Compensation and Benefits**

A huge success for the benefits program was the successful completion of an RFP for external legal services that support the compliance for the MSEA pension and 401(k) programs. The benefits manager led the search for viable firms, created and reviewed the RFP submissions, and guided the interview panel through the selection process. In addition, the benefits manager and executive assistant participated in an internal compliance check-up, conducted by our broker, of the processes, procedures and systems that support our cafeteria plan benefit programs. We are proud to share that MSEA scored a grade above the industry standard for similarly situated businesses.

### **Employment and Labor Relations**

The HR department continues to primarily support managers and staff with coaching and counseling on employment and labor matters. We also provide support to local affiliates as needed with information, resources and tools, as well as share information with state affiliates where appropriate. We remain in contact with the Center for Legal Affairs for guidance on contractual issues, expertise on elevated legal matters, and trending and new employment legislation.

### **Recruitment, Selection, and Turnover**

We started and ended FY 24 with confidence and a strong commitment to fill vacancies with the most qualified candidates and are proud of this accomplishment. We filled all vacancies from the prior fiscal year plus eight vacancies posted in FY 24 and closed the year with 14 new hires. We commenced FY 25 with commitments from seven new hires to start by October 1. The HR executive assistant devoted a significant amount to utilizing diverse recruiting strategies and posting on a variety of platforms for specialized positions. Additionally, the HR team is in the process of building a recruitment and onboarding module on MSEA's ADP platform. Our goal is to continue to streamline the process for users, minimize manual processes and paper, and elevate the employee experience.

### **The Year Ahead**

We understand the elements of the workplace continue to evolve and will strive to maintain a competitive edge among our counterparts. The focus will remain on technology and processing more efficiently, training and professional development, and expanding recruiting efforts to reach diverse and untapped populations. Additionally, we plan to incorporate succession planning as part of the recruiting and placement for vacancies.

### **Bernadette Joe Maddox**

Managing Director, Human Resources

### **Patrick Marshall**

Manager, Benefits and Compensation Programs