

## Executive Director's Report to the 2018 DA

Here are some highlights of KEA's internal and external activities since the 2017 DA:

**May 2017:** During May, we generally prepare for all the activities we have planned during the summer months. We also met with the Attorney General regarding the newly passed charter school legislation and possible legal challenges. We had an important staff meeting regarding the new financial reporting requirements imposed by Senate Bill 6. KEA officially rolled out the KEA App, something that we had been working on for many months.

**June 2017:** This month we held the TALK conference Edith Hayes Middle School in Lexington. Despite the change in venue, we had excellent attendance. We also interviewed many excellent candidates for the vacancy in the position of Assistant Executive Director of Finance, and ultimately made an offer to Paul Mortell. The Assistant Executive Directors and I accompanied a large group of UniServ Directors to the week-long Mid-Atlantic Organizing Institute (MAROI), which was held in Cleveland, Ohio. That intense training culminated in a field experience during which all participants teamed up with people from other affiliates and fanned out across Cleveland to make home visits to Ohio Education Association members. We also held training for District Treasurers and for treasurers from some large locals, to help them support their local treasurers with the new LM reporting requirements. On June 17<sup>th</sup>, we partnered with the Ohio Education Association to offer the RESPECT conference, which is specifically created for education support professionals.

**July 2017:** July is always busy. The entire first week was taken up with the NEA RA, which was held in Boston, MA. During the middle of the month, we held the Local Presidents/Next Generation conference, followed immediately by the KEA Board of Directors summer retreat. Paul Mortell, the new AED for Finance, started in his new position on July 10. With Paul's help, the KEA Investment Committee recommended specific investment goals to the KEA Board of Directors, which the Board unanimously approved.

**August 2017:** August is the end of the KEA fiscal year, so is always taken up with end of year financial concerns. I had my first evaluation as Executive Director; the committee was pleased with my performance during my first year. We collaboratively set new goals for 17-18. The governor also rolled out his (now infamous) pension proposal, which was terrible and immediately caused a well-organized and sustained statewide response.

**September 2017:** Pensions, continued. KEA field staff, the local leaders, the officers and governance all worked together and, in partnership with other labor organizations and other public employees, scheduled dozens of legislative forums across the state. Those forums offered thousands of members the opportunity to directly tell their legislators what they thought about the governor's pension proposal and how it would adversely impact them, their families and their students.

**October 2017:** Internally, we close the 16-17 books and begin the annual audit process. A lot of time is spent organizing our financial information so we can meet the November 29 SB6 filing deadline. Paul Mortell and I attend a training sponsored by the National Conference of State Education Associations (NCSEA) regarding the LMRDA. NEA believes it is highly likely that all its affiliates will soon become subject to the federal LMRDA reporting requirements. Pension blowback continues across the state.

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**November 2017:** KEA initiates an internal audit of our communications processes. Pension activity continues; despite the governor's insistence that he will call a special session before the end of the year, that doesn't happen. We successfully meet the November 29 LM2 filing deadline.

**December 2017:** December is a short month at KEA. The month was notable for what did not happen: no special session about pensions. On December 14 & 15, we had our second staff meeting of the year. We also received preliminary audit results and prepared the 4<sup>th</sup> quarter KEPAC report.

**January 2018:** The 2018 Regular Session of the KY General Assembly begins. We attend the NEA Financial Forum, where we get information about NEA's assessment of the financial impact of the Janus case, set to be heard by the U.S. Supreme Court in February. The outcome of that case will likely be that public sector unions will no longer be able to charge "agency fees" to employees who benefit from a bargained contract with their employer but choose not to become members of the union. That will have an immediate adverse financial effect on NEA and other unions, which will be felt by all state affiliates.

**February 2018:** We are dealing with the legislative session and are also gearing up for the 2018 DA.

### Staff changes since April 2017:

- Sadly, in July, Darrell Johnson, a long-time employee of KEA, succumbed to lung cancer. It all happened very quickly, and was a great shock to everyone who knew him. Darrell was a fixture at KEA HQ for almost 30 years and is missed by his family, friends and colleagues.
- Several staff retired since last April: Daphne Goodin, UD in Barbourville; LuAnn Asbury, UD in Maysville; Mildred (Mac) Johnson, receptionist at KEA HQ; Rose Watkins, Associate at JCTA; and Sheila Partee, Associate at JCTA. Charles Main, Communications Director, announced his retirement effective April 27, 2018.
- New hires this year include: Paul Mortell, Assistant Executive Director for Finance; Sharron Oxendine, UD in Barbourville; Mike Ross, UD in Grayson; Karen Peacock, Associate in Florence; and Becky Smallenburg, Membership Associate at HQ.
- Other staff transitions: Christian Motley, former GR Director, left in May to take another position; Jeff Sherels, UD in Elizabethtown, left on March 1<sup>st</sup> to go to work for the Florida affiliate; Cassie Gossett, former Associate in Florence, also took other employment. Tammy Green, who for many years worked as one of the Membership Associates at HQ, accepted an internal transfer to a confidential Human Resources position.

### Initiatives for 17-18:

**NEA360:** This is a new tech platform that NEA has developed. It is based on IMS, our current membership system, but it includes significantly more functionality. NEA plans to have the platform rolled out in all affiliates by August. KEA is in the initial stages of implementation, but we hope to have the process complete and be fully functional for staff by the end of June.

**Nexonia:** This is an electronic vouchering platform that will allow officers, governance and staff to submit vouchers via a computer or their mobile devices. KEA is working with the vendor to ensure that the program is customized to meet our needs. We hope to roll this out by the end of May.