

# Pioneer Institute's Annual Report

July 2000

## Educational Excellence



School choice – not just for conservatives

“A wise and frugal government...”  
*J. H. Haynes*



Study: State laws hamper construction

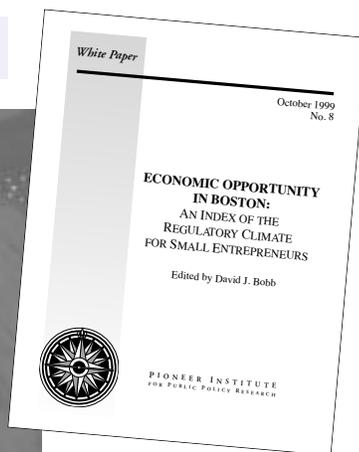
## Effective Public Management

## Pioneer's E4 Strategy

## Emerging Issues



## Economic Opportunity



**PIONEER NETWORK**  
www.pioneernet.org

Grossman: Health care needs fixing, not replacement

[www.pioneerinstitute.org](http://www.pioneerinstitute.org)

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Pioneer Institute's work is based on the belief that individual freedom and responsibility, limited and accountable government, and the expanded application of free market principles to public policy contribute to greater human dignity, happiness, and economic prosperity.

## From the Founding Chairman, Chairman, and Executive Director

A common concern of those who observe and support non-profit organizations, and in particular research institutes, is how to measure success and improvement. Pioneer measures its overall performance on the basis of five key metrics. According to these yardsticks, the past year has been exceptional.

**Quality of Research:** *White Papers* on for-profit hospital conversions, public construction costs, and barriers to small-scale urban entrepreneurship all received high marks for quality and scholarship from independent peer reviewers, and high praise from a broad spectrum of policymakers and opinion leaders.

**Volume of Media Coverage:** The number of quality media “hits” in 1999 was up over 50 percent from the prior year, including Pioneer’s twice-monthly column in the *Boston Herald*.

**Participation of Opinion Leaders:** The number of key policymakers, business and community leaders, scholars, and journalists involved with Pioneer projects and events has grown substantially, thanks in part to the success of our new Lovett C. Peters Lecture Series and a more concerted effort to seek out collaborations with other organizations.

**Adoption of Pioneer Policy Recommendations:** Pioneer played a central role in two recent legislative actions reforming special education and doubling the number of charter schools. In addition, Pioneer research and staff helped to inform innovative proposals from the Cellucci administration concerning public construction laws, school-based funding, and mass-transit financing. There have been setbacks along with the victories. One such case was the defeat (for now) of the effort to repeal through a ballot initiative the state constitution’s prohibition of educational vouchers.

**Strengthening of the Donor Base:** During 1999 Pioneer saw its revenues grow by a remarkable 50 percent, as a result of substantial increases from a number of long-time supporters, major new gifts from several local and national foundations, and a net increase in donors of almost 10 percent. While most of these additional resources were used to support a 33 percent increase in program expenditures, the remainder helped to finance a long-overdue relocation and expansion of the Charter School Resource Center in adjoining office space.



*Pioneer Institute Executive Director James A. Peyser (left to right), Founding Chairman Lovett C. Peters, and Chairman Colby Hewitt, Jr.*

*continued on next page*

Even though these measures present a very positive picture, there is still room for significant improvement. In particular, Pioneer is working on the following three areas:

- *deepening our issue focus*, by selecting projects that fit our “E4 strategy” (see facing page), launching the Center for Urban Entrepreneurship, expanding our services to charter schools, and increasing the volume of *White Papers*;
- *strengthening our core internal systems*, by documenting and refining critical processes and upgrading our database; and
- *sharpening our public image*, by redesigning our publications and website and by launching a new journal entitled *Pioneering Spirit*, to help convey how our policy work improves the lives of everyday people and contributes to a broader civic renewal in the Commonwealth.

We are happy to report that Pioneer Institute has never been healthier and our impact on Massachusetts public policy has never been greater. We are even more pleased to report that the opportunities for further success are plentiful. As always, we look forward to the challenge.



Lovett C. Peters  
Founding Chairman



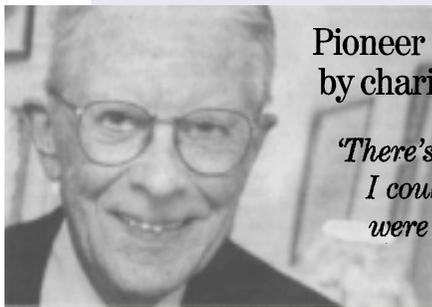
Colby Hewitt, Jr.  
Chairman



James A. Peyser  
Executive Director

Both Pioneer Institute Founding Chairman Lovett C. Peters and Executive Director James Peyser were profiled in *The Boston Globe* this past year.

## He practices what he preaches

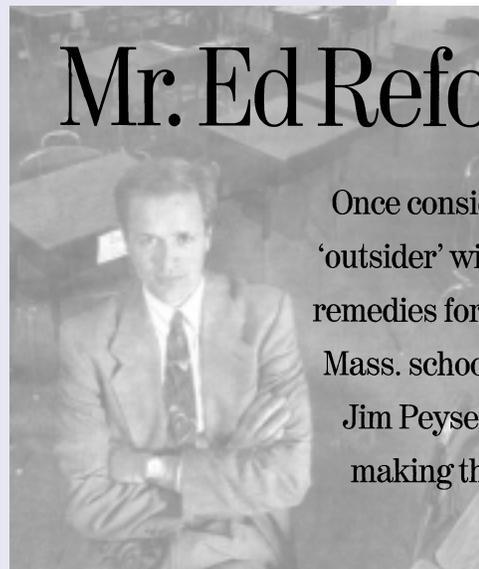


Pioneer Institute's founder driven by charity, entrepreneurial spirit

*“There’s a lot that needs to be done. I couldn’t live with myself if I were playing golf every day.”*

LOVETT C. ‘PETE’ PETERS

## Mr. Ed Reform



Once considered an ‘outsider’ with radical remedies for fixing the Mass. school system, Jim Peyser is now making the rules

Pioneer Institute's greatest strength has been our ability to convert ideas into action, by combining credible policy research and effective promotion with focused and sustained implementation projects. To build on our success and clarify our image, the Institute has launched what we call our "E4 strategy" to focus our work in key areas that leverage our strengths and capitalize on the most promising opportunities for broadening our constituency and affecting public policy.

This four-pronged approach emphasizes:

- **Educational excellence** - driving broad-based educational reform through the expansion of competition and parental choice, with a focus on charter schools.
- **Effective public management** - identifying and analyzing opportunities for improving the quality and reducing the cost of Massachusetts government, through competitive contracting, regulatory reform, innovation, and restructuring.
- **Economic opportunity** - developing a policy framework for reducing urban poverty through economic opportunity, focusing on barriers to self-sufficiency and business development.
- **Emerging issues** - studying the cost-effectiveness of those public policies that help define the role of government or the limits of individual freedom. Promising research in this area may be selected for sustained focus and investment.

In each area, Pioneer is establishing partnerships with other organizations to enhance our credibility, broaden our constituencies, and leverage our investment. A review of Pioneer's work and accomplishments within these areas over the past 12 months follows.

Throughout this report, reference is made to locations on the Pioneer Institute website, [www.pioneerinstitute.org](http://www.pioneerinstitute.org), where more detail is available. The site was completely redesigned this past year to make it more informative and easier to navigate.



Since its founding in 1988, Pioneer Institute has devoted approximately half of its efforts to the improvement of K-12 education. Pioneer seeks to drive broad-based educational reform through the expansion of competition and parental choice. Key to this effort is the continuation and expansion of Pioneer's highly successful Massachusetts Charter School Resource Center. Other efforts over the past 12 months in this area include a survey of Massachusetts residents' views on school

vouchers, the results of which led the state's leading African-American newspaper to editorialize that the idea is "not just for conservatives." In addition, the Institute, in its research *White Paper* series, published a comprehensive comparison of teacher contracts around the Commonwealth, an updated look at the impact of public school choice in Massachusetts, and its first study in the area of higher education, evaluating the potential of applying the charter concept to Massachusetts' system of public colleges.

## Massachusetts Charter School Resource Center

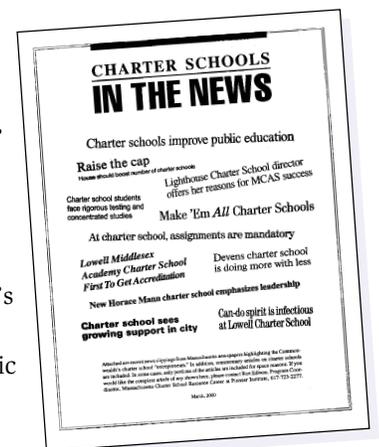
A forerunner and model for other states, the Massachusetts Charter School Resource Center at Pioneer Institute (MACSRC) provides a variety of technical resources at no cost to foster the development and ensure the success of Massachusetts charter schools, which currently number 39. Founded in 1993 when legislation authorizing charter schools was first enacted, the Center has nurtured the schools, seeing the first ones that opened in September 1995 successfully through their five-year renewal process this year. In connection with this first round of re-chartering, MACSRC compiled "Renewal Findings: A Review of the First Fourteen Charter School Renewal Inspection Reports," which identifies best practices within the re-chartered schools for replication elsewhere.

The MACSRC has also broadened its initiatives and programs to cover four key areas for charter schools:

- **School leadership** - providing on-site training of school leaders by the nationally recognized educator Dr. Lorraine Monroe, founder of the Frederick Douglass Academy in Harlem.
- **Governance** (*new this year*) - offering assistance and training to charter school boards of trustees, with a special focus on transitioning from a founding board to a board that manages growth and supports excellence.
- **Development** - assisting urban charter schools broaden their base of philanthropic support through the placement and support of development directors in eight selected schools. Over the past year, the Initiative has generated an estimated \$4 million for capital and enrichment projects in the schools.
- **Accountability** - supporting the development of internal accountability systems based on student achievement data. The Center this year released an "Action Guide" providing a step-by-step approach for building a school-wide accountability system drawn from lessons learned in a cross-section of charter schools.

To promote broad public understanding of charter schools, the Center produces a range of publications for policy makers, opinion leaders, charter school leaders and supporters, and the general public. In addition to the publications mentioned above, these include:

- **Massachusetts Charter School Handbook** - a comprehensive guide to opening a charter school in the Commonwealth, completely revised this year with links to supporting materials and resources available on the web.
- **Massachusetts Charter School Profiles** - a data-oriented look at charter schools' performance, updated yearly.
- **Charter School Newsletter** - a regular update of developments within and affecting the Commonwealth's charter schools.
- **In the News** - a periodic compilation of news articles on charter schools.

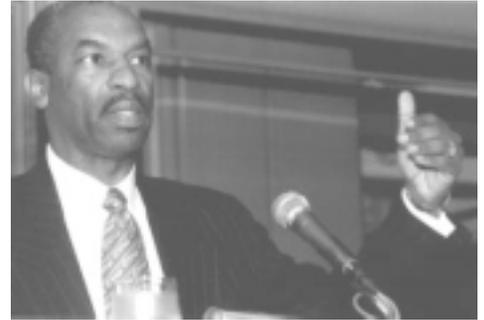


Reflecting its programmatic expansion, the MACSRC this year moved into new, larger quarters located just two floors below Pioneer's main office in an adjoining building. The new space provides a large training and seminar room, resource areas, and expanded office space, enabling the Center to better serve charter schools, while remaining an integral part of Pioneer. The MACSRC has a full-time staff of three and is directed by Linda Brown. More information about the Center's activities is available online at [www.pioneerinstitute.org/csrc](http://www.pioneerinstitute.org/csrc).

## Educational Excellence **H**ighlights

- **“Teacher Contracts in Massachusetts”** by Dale Ballou, University of Massachusetts–Amherst - *White Paper* ([www.pioneerinstitute.org/research/whitepapers/wp12cover.cfm](http://www.pioneerinstitute.org/research/whitepapers/wp12cover.cfm)) and Pioneer Forum ([www.pioneerinstitute.org/research/dialogues/dia36.cfm](http://www.pioneerinstitute.org/research/dialogues/dia36.cfm)); also see “Pending school crisis necessitates reform,” *Boston Herald* op-ed by Research Associate Kim Kosman ([www.pioneerinstitute.org/research/opeds/balanced.cfm](http://www.pioneerinstitute.org/research/opeds/balanced.cfm))
- **“School Choice in Urban Communities”** with Rev. Floyd Flake, former U.S. Congressman - Pioneer Forum ([www.pioneerinstitute.org/research/dialogues/dia34.cfm](http://www.pioneerinstitute.org/research/dialogues/dia34.cfm))
- **“Competition in Education: A 1999 Update of School Choice in Massachusetts”** by Susan Aud, George Mason University - *White Paper* ([www.pioneerinstitute.org/research/whitepapers/wp6cover.cfm](http://www.pioneerinstitute.org/research/whitepapers/wp6cover.cfm)) and Pioneer Forum “Competition in Education: Perspectives on Choice’s Impact on Public Education” co-sponsored with the Kennedy School’s Taubman Center for State and Local Government, Harvard University ([www.pioneerinstitute.org/research/dialogues/dia30.cfm](http://www.pioneerinstitute.org/research/dialogues/dia30.cfm))
- **“House should OK more charter schools”** *Boston Herald* op-ed by Executive Director James Peyser ([www.pioneerinstitute.org/research/opeds/houseok.cfm](http://www.pioneerinstitute.org/research/opeds/houseok.cfm))
- **“Survey Finds Majority Support for School Vouchers”** - *Policy Directions* ([www.pioneerinstitute.org/research/policy/piodrct8.cfm](http://www.pioneerinstitute.org/research/policy/piodrct8.cfm)); also see “For vouchers, a rising tide of support,” *Boston Herald* op-ed by Pioneer Executive Director James Peyser ([www.pioneerinstitute.org/research/opeds/risingtide.cfm](http://www.pioneerinstitute.org/research/opeds/risingtide.cfm))
- **“Charter Schools in Action: Renewing Public Education”** with Chester Finn, former U.S. Assistant Secretary of Education - Pioneer Forum co-sponsored with Harvard Graduate School of Education ([www.pioneerinstitute.org/research/dialogues/dia33.cfm](http://www.pioneerinstitute.org/research/dialogues/dia33.cfm))
- **“Charter Colleges: Balancing Freedom and Accountability”** by Prof. Robert O. Berdahl, University of Maryland, and Terrance J. MacTaggard, Chancellor, University of Maine system - *White Paper* ([www.pioneerinstitute.org/research/whitepapers/wp10cover.cfm](http://www.pioneerinstitute.org/research/whitepapers/wp10cover.cfm)) and Pioneer Forum ([www.pioneerinstitute.org/research/dialogues/dia31.cfm](http://www.pioneerinstitute.org/research/dialogues/dia31.cfm))
- **Charter School Accountability Action Guide** ([www.pioneerinstitute.org/csrc/publications](http://www.pioneerinstitute.org/csrc/publications))
- **Renewal Findings: A Review of the First Fourteen Charter School Renewal Inspection Reports** ([www.pioneerinstitute.org/csrc/publications/renewing.cfm](http://www.pioneerinstitute.org/csrc/publications/renewing.cfm)); also see “Early grades good for charter schools,” *Boston Herald* op-ed by author Kathryn Ciffolillo and Charles Chieppo, Director of Pioneer’s Center for Restructuring Government ([www.pioneerinstitute.org/research/opeds/checking.cfm](http://www.pioneerinstitute.org/research/opeds/checking.cfm))
- **Massachusetts Charter School Handbook**, 4th edition ([www.pioneerinstitute.org/csrc/cshb](http://www.pioneerinstitute.org/csrc/cshb))
- **1998-99 Massachusetts Charter School Profiles** ([www.pioneerinstitute.org/csrc/cshb/profiles.cfm](http://www.pioneerinstitute.org/csrc/cshb/profiles.cfm))
- **“With incentives, public education may improve”** - *Boston Herald* op-ed by Pioneer’s Founding Chairman Lovett C. Peters ([www.pioneerinstitute.org/research/opeds/educatinent.cfm](http://www.pioneerinstitute.org/research/opeds/educatinent.cfm))
- **“No solution, just haughty air from MTA”** - *Boston Herald* op-ed by Lovett C. Peters ([www.pioneerinstitute.org/research/opeds/haughty.cfm](http://www.pioneerinstitute.org/research/opeds/haughty.cfm))

**Teacher contracts rigid, officials don’t take advantage of freedoms, study finds**



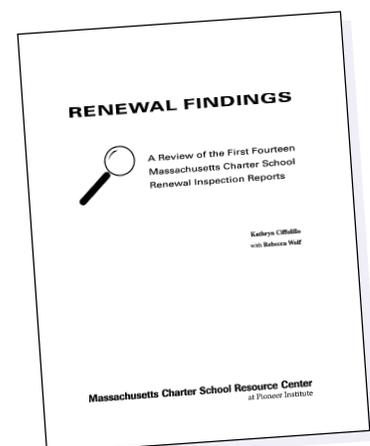
Former Congressman Rev. Floyd Flake at a Pioneer Forum on school choice.

**School choice – not just for conservatives**

**FSC president likes charter idea for all state colleges**

*‘We need to give these nine state colleges a chance to be more entrepreneurial, more innovative and deal with less bureaucracy.’*

**Dr. Michael P. Riccards**



One of Pioneer Institute's core values is the streamlining and restructuring of state and local governments. The Institute believes more effective public management can be achieved through increased competition, regulatory reform, and other innovative opportunities for improving the quality of services and reducing the cost of Massachusetts government. Spearheading Pioneer's efforts in this area is the Center for Restructuring Government, which:

- conducts the acclaimed annual Better Government

## Center for Restructuring Government

Now in its fourth year, the Center for Restructuring Government focuses on finding ways to streamline state and local government by introducing competition to service delivery, eliminating unnecessary regulation, and refocusing government on its core functions.

A major focus of the Center this past year was on the need for reform of public construction laws in Massachusetts. A September 1999 *White Paper*, "The Cost of Inaction: Does Massachusetts Need Public Construction Reform?" published by the

### Public Works In Mass. Seen Costly, Late

—Wall Street Journal

Center, compared practices in Massachusetts with Florida, Texas, and Indiana, finding that the Commonwealth lags far behind all three states in keeping costs

### Study: State laws hamper construction

**'This makes Massachusetts look terrible. We have the most regulated public construction system in America.'**

CHARLIE CHIEPPO,  
PIONEER INSTITUTE

—Boston Herald

## Old laws blamed for waste of \$220m

—Boston Globe

down and completing projects on time. Regulatory requirements—unique to Massachusetts—are to blame, according to author Douglas Gransberg. A follow-up study focusing solely on "vertical" construction (buildings, as opposed to roads) that was undertaken in response to critics who claimed the original study was too heavily weighted toward highway construction showed even worse performance, in terms of cost and length of time for projects to be completed.

Competition, a citizens' idea contest on ways to improve government;

- publishes research under Pioneer's *White Paper* series that provides practical recommendations to policy makers;
- sponsors various events and forums; and
- publishes a regular newsletter.

By exposing ineffective, costly government functions and regulations and by promoting competition in public management, Pioneer seeks to ensure that citizens and taxpayers come first.

The Center also focused on public transportation cost issues. Through the publication of newspaper op-eds and public testimony, the Center drew attention to a contract between the MBTA and Bay State Transit Services that would have saved \$116 million over five years. The U.S. Department of Labor forced the T to break the contract when it imposed a new interpretation of a 36-year-old labor protection statute. An op-ed by Center director Charles Chieppo was at the heart of a U.S. Senate Banking Committee hearing on the controversy.

Chieppo also served on a seven-member blue ribbon committee appointed by the Massachusetts

## T reform derailed, thanks to Moakley

—Boston Herald

Secretary of Transportation and Construction to advise the MBTA on its transition to "forward funding," a new financing mechanism that took effect on July 1st. Among the committee's recommendations were a fare increase, a focus on system maintenance and modernization over further expansion, and the implementation of an automated fare collection system.

The Center for Restructuring Government is grateful for the continuing support of its Advisory Committee:

- Cornelius J. Chapman, Jr., Hutchins, Wheeler & Dittmar
- Tamara Davis, Massachusetts Board of Higher Education
- Joseph Downing, General Finance, LLC
- Darius W. Gaskins, Jr., High Street Associates
- Robert Melia, Maximus
- John O'Leary, Lycos
- Paul S. Russell, M.D., Massachusetts General Hospital/Harvard Medical School

More information about the Center's activities is available online at [www.pioneerinstitute.org/crg](http://www.pioneerinstitute.org/crg).

## Effective Public Management **H**ighlights

- **“The Cost of Inaction: Does Massachusetts Need Public Construction Reform?”** by Douglas Gransberg, University of Oklahoma - *White Paper* ([www.pioneerinstitute.org/research/whitepapers/wp7cover.cfm](http://www.pioneerinstitute.org/research/whitepapers/wp7cover.cfm)) and Pioneer Forum
- **“Vertical Construction Performance in Massachusetts Lags Far Behind Other States”** by Douglas Gransberg - *Policy Directions* ([www.pioneerinstitute.org/research/policy/piodrct6.cfm](http://www.pioneerinstitute.org/research/policy/piodrct6.cfm))

- **“Survey of Massachusetts Municipalities Finds Competitive Contracting Widely Used”** - *Policy Directions* ([www.pioneerinstitute.org/research/policy/piodrct7.cfm](http://www.pioneerinstitute.org/research/policy/piodrct7.cfm))

- *Boston Herald* op-eds by Charles Chieppo on effective public management issues include:
  - “MWRA privatization is worth floating”
  - “SJC makes Pacheco law bulletproof”
  - “Tribulations in trial courts”
  - “DeNucci runs privatization off the road”
  - “MBTA fare hike is fair deal”
  - “T reform derailed, thanks to Moakley”



(To read these and other Pioneer Institute op-eds, visit [www.pioneerinstitute.org/research/opeds](http://www.pioneerinstitute.org/research/opeds))

## 1999 Better Government Competition

As part of its mission to streamline government, the Center is the sponsor of the Better Government Competition (BGC), an annual citizens' idea contest for improving governmental efficiency and effectiveness. In the first nine years of the Competition, implementation of winning ideas has saved Massachusetts taxpayers over \$250 million and improved the quality of numerous public services.

**1999 BGC Winner:** Minnesota Board of Government Innovation and Cooperation

A state-local partnership to improve local public service, the board has authority to award competitive grants to local officials willing to develop innovative means of service delivery; waive administrative rules and grant exemptions from procedural laws; and approve locally developed plans to merge governmental units. Benefits have totaled nearly \$15 million, with recurring annual savings of \$7 million expected.

**1999 BGC Runner-Up:** Small Property Owners Association – *Working with Small Property Owners to Preserve and Create Affordable Housing: No-Cost and Low-Cost Solutions*

The association proposes various legislative and regulatory changes, including mandatory escrow of rent legally withheld because of code violations, a streamlined eviction process, building and sanitary codes allowing for more diverse physical structures, and prioritized code enforcement to enable low- and middle-income property owners to generate rents adequate to maintain affordable housing properties.

**1999 BGC Honorable Mention:** William M. Connolly – *New Jersey Division of Codes and Standards*

The agency has enacted a Rehabilitation Subcode, replicable in Massachusetts and other states, to eliminate the disincentive to improving property that is created by stringent building codes. The plan recognizes that standard building codes cannot always be met in existing structures, expensive alterations do not always increase safety, and fear of unexpected costs often keeps owners from improving their buildings.

**1999 BGC Honorable Mention:** Roberta Schaefer – *Benchmarking Municipal Performance: A Tool for Streamlining Government*

The benchmarking project, underway in Worcester, assesses city government performance in three steps: identifying measurable

## “A wise and frugal government...”

*W. H. Rouse*



The BGC honorees: back row (l-r): William Connolly of the New Jersey Division of Codes and Standards, Jim Gelbmann of the Minnesota Board of Government Innovation and Cooperation, Skip Schlomg of the Small Property Owners Association, and Michael Goodman of the Worcester Municipal Research Bureau; front row (l-r): Roberta Schaefer of the Worcester Municipal Research Bureau and Lenore Schlomg of the Small Property Owners Association.

indicators of the city's progress toward publicly stated goals; gathering and analyzing relevant data; and using the data to improve the effectiveness of the city government.

The awardees were honored at a November dinner attended by Pioneer supporters and friends, policy makers, journalists, and other opinion leaders. Dean Joseph Nye of Harvard University's John F. Kennedy School of Government delivered this year's keynote address on the effect of information technology on democratic governance.

“Thank you” to the 1999 BGC judges:

- **Robert M. Costrell**, Professor of Economics, University of Massachusetts–Amherst
- **Joanna Lau**, President and Chairman of the Board, Lau Technologies
- **Sally B. Porter**, former Executive Director, Maryann Morse Nursing and Rehabilitation Center
- **William B. Tyler**, President, Rackemann, Sawyer & Brewster
- **Michael Widmer**, President, Massachusetts Taxpayers Foundation

As a market-oriented public policy research organization, Pioneer Institute is committed to enhancing individual economic opportunities and reducing regulatory barriers to self-sufficiency and small business development. To oversee and coordinate its efforts in this regard, the Institute this year launched a new center—its third—the Center for Entrepreneurship. Aimed at stimulating and cultivating business endeavors in the Commonwealth, with particular focus on small-

scale entrepreneurial activity in Massachusetts' inner cities, the new Center primarily provides technical support to grassroots organizations that offer direct services to budding entrepreneurs. In addition, the Institute underscored its commitment in this area by devoting its annual Lovett C. Peters Lecture in Public Policy to the topic "How Regulation and Taxation Stifle Entrepreneurship" by renowned economist and media personality Walter E. Williams.

## Center for Entrepreneurship

Pioneer's new Center for Entrepreneurship has a two-fold mission: bolstering small-scale entrepreneurial activity primarily in low-income urban areas around the Commonwealth, while also redefining economic development policy in Massachusetts.

"Our goal is to create more vibrant urban neighborhoods that offer plentiful economic opportunities, in order to help low-income individuals and families achieve self-sufficiency," explains Gabriela Mrad, former Pioneer research director, who now directs the Center. "We hope direct service providers will rely on the Center as a primary source of information and support, while opinion leaders, policy makers, and the media recognize it as an original and influential voice in the formation of economic development policy."

The initiative involves a four-pronged approach by:

- conducting research into the effectiveness of existing services and programs and identifying regulatory obstacles to small-scale business endeavors;
- making public policy recommendations to strengthen urban entrepreneurship;
- sponsoring forums for public education on the issues involved; and
- providing opportunities for networking among organizations offering services to entrepreneurs.

The effort is targeted toward organizations providing direct services primarily in six areas: legal services, microfinance, direct investment, business training, market making, and consulting.

The Center builds on several Pioneer activities this past year concerning urban entrepreneurship. These include the publication of a *White Paper*, "Economic Opportunity in Boston," which surveyed the regulatory climate in Boston, and a Forum last fall on "Regulation, Economic Opportunity, and Small Business in Boston" with Boston City Councilor Thomas M. Keane, Jr. and attorney Dana Berliner of the Institute for Justice.



Upcoming activities planned by the Center—working in collaboration with institutions of higher education, community-based service agencies, and other policy organizations—include:

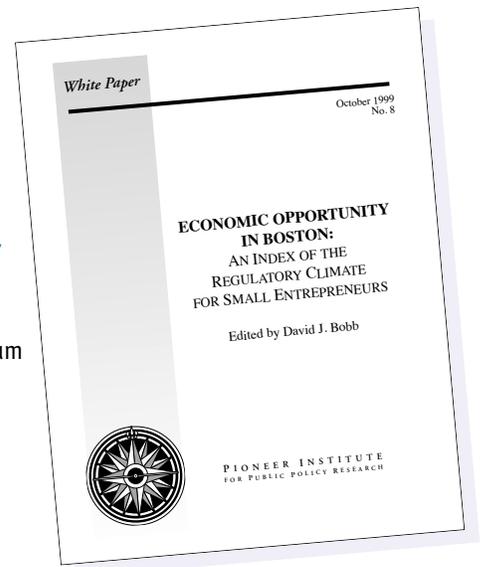
- conducting a market survey of microenterprise activity in Boston;
- publishing case studies of successful small-scale entrepreneurs, a follow-up and expansion of the economic opportunity *White Paper*, and research into the role of microenterprise in economic and neighborhood development;
- compiling a directory of organizations that support small-scale entrepreneurs in Massachusetts; and
- convening a conference of service providers, entrepreneurs, and scholars to identify common needs and opportunities.

The Center for Urban Entrepreneurship was made possible largely through funding from:

- **Shelby Cullom Davis Foundation**
- **David C. Evans, Jr.**
- **Ruth and Lovett Peters Foundation**

## Economic Opportunity **H**ighlights

- “Economic Opportunity in Boston: An Index of the Regulatory Climate for Small Entrepreneurs” - *White Paper* ([www.pioneerinstitute.org/research/whitepapers/wp10cover.cfm](http://www.pioneerinstitute.org/research/whitepapers/wp10cover.cfm)); also see “Red tape wreaks havoc on business,” *Boston Herald* op-ed by Pioneer Research Associate David Bobb ([www.pioneerinstitute.org/research/opeds/labyrinth.cfm](http://www.pioneerinstitute.org/research/opeds/labyrinth.cfm))
- “Regulation, Economic Opportunity, and Small Business in Boston” - Pioneer Forum
- “How Regulation and Taxation Stifle Entrepreneurship” - 2000 Lovett C. Peters Lecture in Public Policy by Walter E. Williams, George Mason University ([www.pioneerinstitute.org/research/dialogues/dia32.cfm](http://www.pioneerinstitute.org/research/dialogues/dia32.cfm))



## 2000 Lovett C. Peters Lecture in Public Policy

Designed to recognize individuals of vision and original thought who have distinguished themselves within their fields, the Lovett C. Peters Lecture in Public Policy Research is one of Pioneer’s premier events of the year. This April, in connection with the launch of the Institute’s Center for Urban Entrepreneurship, guest lecturer Walter E. Williams, the John M. Olin Distinguished Professor of Economics at George Mason University, spoke on the ways regulation and taxation hinder entrepreneurship.

Nearly 300 invited guests from business, law, government, journalism, and other fields joined Pioneer friends at the Four Seasons for the third lecture in this newly established Boston tradition—described by *The Improper Bostonian* as a “seriously cerebral and highly edifying evening.”



Introducer Cathy E. Minehan, President and Chief Executive Officer of the Federal Reserve Bank of Boston, introduced guest speaker Walter E. Williams at the 2000 Lovett C. Peters Lecture in Public Policy. Williams, a renowned economist, columnist, professor, radio personality, and author, outlined ways government regulation and taxation stifle entrepreneurship, concluding “there’s no problem in our economy that less government and more liberty would not solve.” Looking on is Pioneer’s Founding Chairman Lovett C. Peters.

**IMPROPER BOSTONIAN**  
**Murmurs Among the Ruling Class...**  
“If a bomb fell on this building right now, the local economy would cease to exist.”  
That’s how one guest described the high-powered, high-minded crowd who gathered at the **Four Seasons** for the third annual **Lovett C. Peters Lecture** sponsored by the **Pioneer Institute for Public Policy**.

The Peters Lecture is fully funded through the generosity of:

- Shelby Cullom Davis Foundation
- William S. Edgerly
- Ruth and Lovett Peters Foundation
- Frederick G.P. Thorne

While focusing on educational excellence, effective public management, and economic opportunity, Pioneer Institute also seeks to stay on the cutting-edge of the public policy debate, identifying and exploring “emerging issues” that further the Institute’s aims of limited government, individual freedom and choice, and market-oriented solutions to civic problems.

## Pioneer’s Research Department

The core of Pioneer’s mission is the generation of ideas through scholarly research and publications, which in turn the mission of the Institute’s Research Department. Over the years the Department has built an impressive library of work by local and national authorities on issues ranging from bilingual and special education to welfare and insurance reform, among others—all available online at [www.pioneerinstitute.org/research](http://www.pioneerinstitute.org/research).

Pioneer commissions research from experts in Massachusetts and around the country, which is subject to a rigorous peer review process by scholars in the field before being published. The Department consults with the Institute’s Board of Directors as well as leading experts and schools before selecting

topics for research. The Department is directed by James Stergios and aided by a distinguished Board of Academic Advisors:

- **Randy E. Barnett**, Boston University
- **Brigitte Berger**, Boston University
- **Robert M. Costrell**, University of Massachusetts–Amherst
- **Jeffrey S. Flier**, Harvard University
- **Nathan Glazer**, Harvard University
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## Emerging Issues Highlights

- **“The Economic History of Health Care in Massachusetts 1990-2000”** by Jerome H. Grossman, M.D. - *White Paper* ([www.pioneerinstitute.org/research/whitepapers/wp11cover.cfm](http://www.pioneerinstitute.org/research/whitepapers/wp11cover.cfm)) and Pioneer Forum “Health Care Today: How Did We Get Here? What Now?” ([www.pioneerinstitute.org/research/dialogues/dia35.cfm](http://www.pioneerinstitute.org/research/dialogues/dia35.cfm))

## Grossman: Health care needs fixing, not replacement

- **“Time to rethink health care ‘reform’”** - *Boston Herald* op-ed by James A. Peyser, Pioneer Executive Director ([www.pioneerinstitute.org/research/opeds/rethink.cfm](http://www.pioneerinstitute.org/research/opeds/rethink.cfm))
- **“Universal care no cure-all”** - *Boston Herald* op-ed by Gabriela Mrad, former Pioneer Research Director ([www.pioneerinstitute.org/research/opeds/nocure.cfm](http://www.pioneerinstitute.org/research/opeds/nocure.cfm))



House Speaker Thomas Finneran (left) makes a point at a Pioneer Forum on convention center feasibility studies. At right is White Paper author Heywood Sanders.

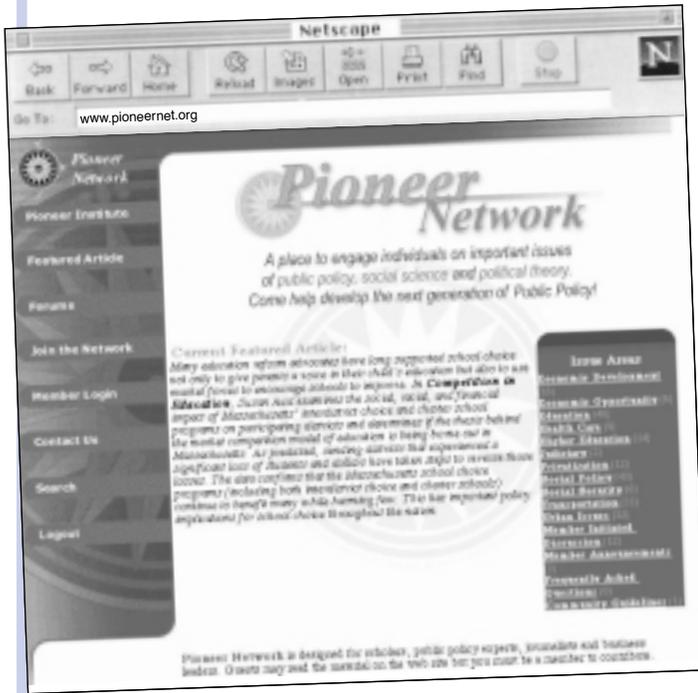
- **“Flawed Forecasts: A Critical Look at Convention Center Feasibility Studies”** by Heywood T. Sanders, Trinity University - *White Paper* ([www.pioneerinstitute.org/research/whitepapers/wp9cover.cfm](http://www.pioneerinstitute.org/research/whitepapers/wp9cover.cfm)) and Pioneer Forum co-sponsored with the Kennedy School’s Taubman Center for State and Local Govern-

## Pioneer Network

Developing the next generation of public policy is one of the aims of Pioneer Network, the Institute's two-year-old online forum for informed individuals to review and discuss recent research and developments in public policy from a market-based perspective.

A members-based "virtual community" of academicians, public policy experts, government officials, opinion leaders, journalists, students, and other interested individuals from

across the nation, Pioneer Network provides an opportunity for anyone to participate in discussion around leading-edge scholarship and help generate original, market-oriented approaches to civic concerns. The site, completely redesigned this year to be more user-friendly, can be accessed at [www.pioneernet.org](http://www.pioneernet.org).



ment, Harvard University; also see "Conventional wisdom is anything but," *Boston Herald* op-ed by Heywood T. Sanders ([www.pioneerinstitute.org/research/opeds/conventwis.cfm](http://www.pioneerinstitute.org/research/opeds/conventwis.cfm))

- **"Commanding Heights"** – Pioneer Forum on the global triumph of free markets with Daniel Yergin, Cambridge Energy Research Associates

*Daniel Yergin speaks on the shift from state control to market ascendancy worldwide in the "new economy," as detailed in his book Commanding Heights.*



- **"Let HOT lane cool off gridlock"** - *Boston Herald* op-ed by Gabriela Mrad ([www.pioneerinstitute.org/research/opeds/freeway.cfm](http://www.pioneerinstitute.org/research/opeds/freeway.cfm))

Twice monthly, Pioneer Network posts a substantive and timely article with an abstract, providing cogent summaries of important published work. Additional studies or articles are provided to help frame the discussion around a particular topic. Our message board software allows members to engage in a continuing dialogue, establish relationships, and build a broader research network. Over time, the postings comprise a valuable, easily searchable archive, and through the ongoing discussions, ideas in the articles are more fully developed and new ideas are explored, leading to further research and publications.

Most of Pioneer Institute's scholarly research is posted on Pioneer Network. Below is a sampling of additional "non-Pioneer" postings over the past year:

- **Privatization 1999: The 13th Annual Report of Privatization**, Reason Public Policy Institute
- **Economic Analysis of a Living Wage Ordinance**, Employment Policies Institute
- **Making Welfare-to-Work Fly**, Peter Cove
- **A Review of Recent Evidence on the Effect of the Minimum Wage on the Working Poor**, Richard V. Burkhauser
- **Reducing Poverty, Not Inequality**, Martin Feldstein
- **Enough of the Small Stuff! Toward a New Urban Agenda**, Bruce Katz, Brookings Institution
- **Yes, Tax the 'Net: Don't Subsidize E-commerce; Instead, Reform Sales Taxes**, Michael Greve, American Enterprise Institute
- **Does Transit Work? A Conservative Reappraisal**, Paul Weyrich and William Lind
- **HOT [High-Occupancy Toll] Lanes: A Better Way to Attack Urban Highway Congestion**, Robert W. Poole and C. Kenneth Orski
- **The Teachers We Need and How to Get More of Them**, Fordham Foundation
- **School Choice in Washington, D.C.: An Evaluation after One Year**, Paul Peterson, Harvard University
- **The New York City Teachers' Union Contract: Shackling Principals' Leadership**, Dale Ballou, University of Massachusetts-Amherst

Log on to [www.pioneernet.org](http://www.pioneernet.org) and join the discussion!

It is only through the support of like-minded friends that Pioneer Institute has been successful in “putting ideas into action.” Gifts large and small enable the Institute to continue and expand its efforts to bring well-researched,

sensible solutions to public policy issues in the Commonwealth. We are most grateful for the loyalty and generosity of those who have contributed in fiscal year 1999.

***Thank you all very much!***

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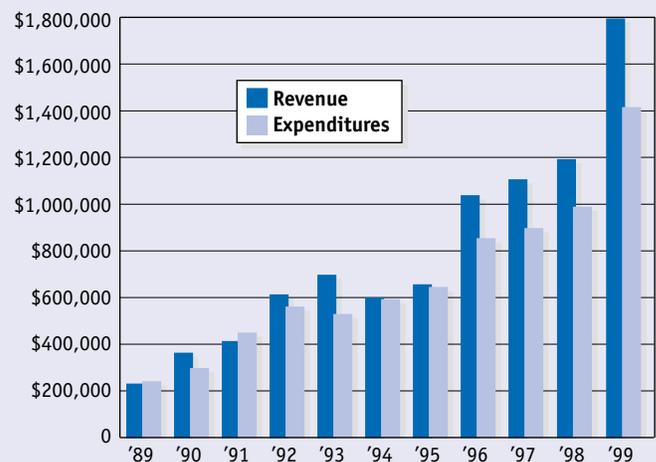
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## 1999 Financial Data

Pioneer Institute saw a significant increase in revenues in 1999—its most recent complete fiscal year—providing the financial underpinning for the wide-ranging accomplishments reviewed within these pages. The Institute’s revenue stream of nearly \$1.8 million represents a remarkable 50 percent increase within just one year. While most of these additional resources were used to support a 33 percent increase in program expenditures, the remainder helped to finance a long-overdue relocation and expansion of the Charter School Resource Center in adjoining office space. Continuing conservative fiscal management has put the Institute on a solid, stable financial footing, ensuring that Pioneer will continue “putting ideas into action” for years to come.

The growth in revenues was fueled by substantial increases from a number of long-time supporters, major new gifts from several local and national foundations, and a net increase in donors of just under 10 percent. Foundation grants accounted for just under half of all revenues; a nearly equally large portion came from individuals who share our belief in limited government and market-

### Revenues and Expenditures, 1989-1999



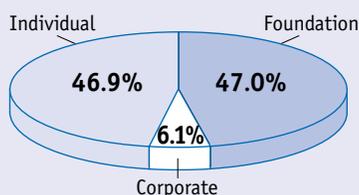
oriented policy ideas; and the remainder was from corporate gifts. Pioneer neither seeks nor accepts any government funding.

To ensure that our donors are getting the best possible return on their investment, the Institute spent four of every five dollars directly on programmatic and

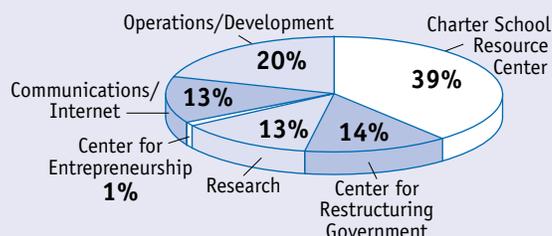
research activities—our main mission—in 1999.

The Institute’s financial statements are audited each year. An audited financial statement for 1999 by Glenn Ricciardelli, P.C. will be available on request.

### 1999 Revenues



### 1999 Expenditures



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**Lovett C. Peters** is the Founding Chairman of Pioneer Institute. Following a long business career in energy and banking, “Pete” Peters began Pioneer in 1988 with a grand vision—but only a skeleton staff, which has grown steadily over the years along with the Institute’s influence. A 1936 Yale University graduate, he is a trustee of Hillsdale and Nichols Colleges. His wife, Ruth Stott Peters, is an enthusiastic Pioneer supporter. ▶



◀ **Colby Hewitt, Jr.** was elected Chairman of Pioneer in 1997 to support the efforts of Founding Chairman Pete Peters. For 45 years he led Aon Risk Services, an insurance business in Boston. A Harvard University graduate, he has served on the boards of several Massachusetts educational and health care institutions.

**James A. Peysner** has been Executive Director of Pioneer since 1993. He also serves as Chairman of the Massachusetts Board of Education, and took a four-month leave of absence from Pioneer in 1995 to serve as Under Secretary of Education and Special Assistant to the Governor for Charter Schools. He previously worked in business and on Capitol Hill. A graduate of Colgate University, he holds a master’s from The Fletcher School (Tufts University). ▶



◀ **Linda Brown** has been Director of the Massachusetts Charter School Resource Center at Pioneer since 1993, working directly with state authorizers and individual education entrepreneurs to see charter schools take root and flourish. Prior to joining Pioneer, she held the position of associate head of school at an independent school in Cambridge, Massachusetts.

**Ralph Buglass** is Pioneer’s Director of Communications. Before joining Pioneer in 1999, he produced many of the Institute’s publications through his own communications business. A graduate of Cornell University with a master’s in journalism from American University, he has also been employed in communications capacities in education and health care. ▶



◀ **Charles Chieppo** is Director of the Center for Restructuring Government at Pioneer. Prior to coming to Pioneer in 1995, he was a special assistant to the Massachusetts Secretary of Administration and Finance, and New York coordinator for Paul Tsongas’ 1992 presidential campaign. He holds a law degree from Vanderbilt University and a bachelor’s degree from Boston University.

*continued on next page*



◀ **Nicole Clowes** joined Pioneer earlier this year as Administrative Assistant after working in the publishing industry as an advertising and circulation manager. She attended Northeastern University, studying English and journalism.

**Rosamond Edison** is the Program Coordinator of the Charter School Resource Center. She joined Pioneer in 1999 after receiving a master's from the Arthur D. Little School of Management. A graduate of the University of Idaho, she served three years in Bucharest, Romania, as a teacher of English. ▶



◀ **Marci Cornell Feist** is Program Director of the Charter School Development Initiative, supporting charter schools in broadening their base of philanthropic support. She joined Pioneer in early 1999 from Advantage Schools, Inc. A graduate of Bowdoin College, she holds a master's in international education from Harvard Graduate School of Education.

**Morris Gray** is Pioneer Institute's Treasurer. A Harvard graduate ('43, MBA '47), he was previously a vice president of State Street Bank and currently serves on the boards of WGBH, the Museum of Science, the Trustees of the Reservations, and other Boston and Massachusetts civic organizations. ▶



◀ **Susan Hoopes** joined Pioneer as Director of Operations in 1999. A graduate of the Whittemore School of Business and Economics at the University of New Hampshire (UNH), she has been employed in the field of business management for the past 15 years, most recently as Business Manager for the Institute on Disability at UNH.

**Virginia Markstein** is Pioneer's Development Associate. She joined Pioneer in 1999 after graduating from Wheaton College in Norton, Massachusetts. While in college, she worked for a variety of nonprofit organizations and was a U.S. congressional intern. ▶



◀ **James Stergios** was appointed Pioneer's Research Director earlier this year. Formerly a Research Associate at Pioneer, he has taught economics at universities in Rome and Kyoto, Japan. He graduated from Boston University summa cum laude in philosophy and economics and is currently finishing his doctoral dissertation in political sociology at Boston University's University Professors Program.

**Rebecca Wolf** is Special Projects Associate at Pioneer, working this past year with the Research Department, the Charter School Resource Center, and the Center for Entrepreneurship. A graduate of the University of Virginia, she taught for two years in Honduras before coming to Pioneer in 1997. ▶



The Institute benefits greatly from the assistance of part-time consultants:

- **David Bobb**, Research Associate
- **Kathryn Ciffolillo**, Writer/Editor
- **Kimberly Kosman**, Research Associate
- **Shawni Littlehale**, Research Associate
- **Gabriela Mrad**, Director, Center for Entrepreneurship

If you have supported Pioneer Institute in the past, we hope this review of our achievements in the areas of educational excellence, effective public management, economic opportunity, and emerging issues will persuade you to renew your support. If this your first introduction to Pioneer, we hope you will decide to join us.



Pioneer Institute is an independent, non-profit organization specializing in the support, distribution, and promotion of scholarly research on Massachusetts public policy issues.

**PIONEER INSTITUTE  
for Public Policy Research**

is an independent, non-partisan, privately funded 501(c)(3) educational organization. Your tax-deductible gift enables Pioneer to expand the impact of its policy studies and projects on decision-makers in academia, business, government, and the media. Pioneer's mission is to change the intellectual climate in Massachusetts by supporting scholarship that develops alternative approaches to real-world social and economic issues. The Institute believes that individual freedom and responsibility, limited and accountable government, and the expanded application of free-market principles to public policy contribute to greater human dignity, happiness, and economic prosperity.

We hope that you will consider supporting Pioneer at one of the membership levels described below:

- **FRIEND'S CIRCLE (\$100).** Friends receive *Quarterly Digest*, highlighting Pioneer's recent activities and publications, and *Chairman's Update*, a periodic newsletter specifically for Pioneer supporters. Friends also receive invitations to our popular speakers' series, Pioneer Forum, and an invitation to our annual Better Government Competition Dinner, an awards ceremony featuring a distinguished speaker and innovative ideas for streamlining and improving Massachusetts government.
- **PATRON'S CIRCLE (\$500).** In addition to the above benefits, Patrons receive an invitation to a private reception with the featured speaker at the Better Government Competition Dinner, and an opportunity to attend informal staff lunches, which offer our supporters a chance to exchange ideas with members of Pioneer's staff.
- **BENEFACTOR'S CIRCLE (\$1,000).** In addition to the above benefits, Benefactors receive complimentary copies of Pioneer's research publications, including books, *White Papers*, and the annual Better Government Competition compendium. Benefactors also receive an invitation to the Lovett C. Peters Lecture in Public Policy, an annual black-tie event featuring speakers who are distinguished by their intellectual stature and national or international reputation.
- **SILVER CIRCLE (\$5,000).** In addition to the above benefits, Silver Circle members receive invitations to all VIP receptions surrounding the Better Government Competition Dinner and the Lovett C. Peters Lecture in Public Policy, special invitations to occasional private events with prominent free market advocates, and a private luncheon with Pioneer's executive staff.

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