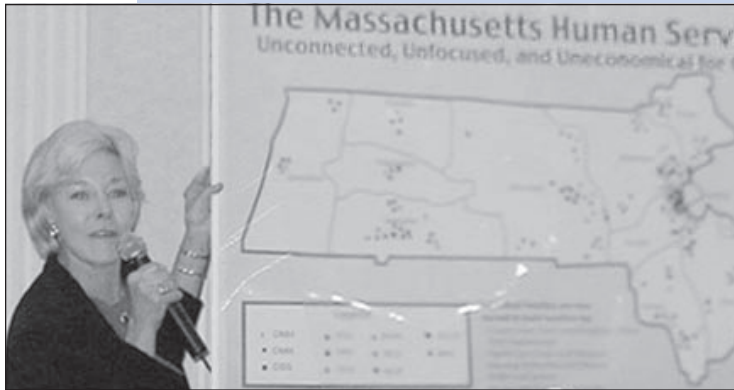


THE FACES



of



CHANGE



PIONEER INSTITUTE for Public Policy Research
Putting ideas into action for Massachusetts

Annual Report

2 0 0 2

2002 was a watershed year for Massachusetts and for Pioneer Institute.

A growing fiscal crisis and citizen disaffection with Beacon Hill helped bring a fresh, new face to the Governor's office. Governor Mitt Romney, an energetic advocate of government reform, has embraced much of Pioneer's policy agenda in his campaign to produce a more effective and affordable state government in Massachusetts.

Pioneer played an important role in shaping the political environment that is bringing real change on Beacon Hill. Through credible, timely research and broad public outreach, we made a compelling case for reform with Massachusetts citizens, business leaders, and opinion shapers. Our work has helped form the blueprints for change that are now emerging on various fronts.

Fighting the political patronage that is strangling our courts


- Governor Romney has embraced Pioneer Institute's call for reforming court management.
- Chief Justice Marshall appointed a special study committee to address the problems detailed by Pioneer; its report echoes many of Pioneer's recommendations.
- Common Cause, the League of Women Voters, and the Appleseed Foundation joined Pioneer Institute to create the Citizens Coalition for an Independent Judiciary.

Untangling the bureaucracy for more effective, affordable public services

- Pioneer Institute's blueprint for restructuring the state's 16 human service agencies has become a cornerstone of Governor Romney's human services overhaul plan.
- Our analysis of Massachusetts' anti-privatization law—the Pacheco Law—is fueling efforts to loosen the death grip of this law on the private provision of public services.
- By detailing millions of dollars in wasteful practices, Pioneer has helped energize the case for more efficient state and local government.

Promoting excellence in K-12 education

- Pioneer Institute's Massachusetts Charter School Resource Center provided technical assistance to all 46 operating charter schools.
- Our Building Excellent Schools Fellowship Program is bringing about new, top-quality charter schools.
- A Pioneer policy forum on the bilingual education referendum gave voters valuable insight into new approaches to teaching English to non-native students in Massachusetts.

 **Look for** checkmarks of action and progress throughout this report.

During 2002, Pioneer Institute made significant inroads toward improving the way state government operates and toward bringing free market principles to public policy. It has truly been a year of "putting ideas into action."



Colby Hewitt, Jr.
Chairman



Lovett C. Peters
Founding Chairman



Stephen J. Adams
President/CEO

2003 marks the fifteenth anniversary of Pioneer Institute. Massachusetts' leading think tank, Pioneer sponsors research that challenges the "conventional wisdom" on Massachusetts public policy issues. Underlying all of Pioneer's work is a commitment to individual freedom and responsibility, limited and accountable government, and the expanded application of free-market principles to public policy.



Since its founding in 1988, Pioneer has had a major impact on the Commonwealth's civic landscape and quality of life, developing and articulating innovative, market-oriented policy ideas and then helping to put them into action. Building on its established strengths, Pioneer follows an "E4 strategy" that focuses on four areas:



Educational excellence - driving broad-based educational reform through the expansion of competition and parental choice, with particular attention to charter schools.

Effective public management - identifying opportunities for improving the quality and reducing the cost of Massachusetts government, through competitive contracting, regulatory reform, innovation, and restructuring.



Economic opportunity - enhancing the wealth-creation potential of low-income entrepreneurs in Massachusetts cities as one avenue to revitalizing our urban neighborhoods.

Emerging issues - exploring new approaches to public policy issues that further the institute's aims of competition, accountability, and individual freedom.



This publication reviews Pioneer Institute's accomplishments in these areas during 2002.

Boston Business Journal

Editorial • November 1, 2002

“The Pioneer Institute... has been the state's **most incisive and persistent voice for efficient government.**”



Judicial activism— of a different sort

Retired District Court Judge James Dolan

Having served as a Massachusetts District Court judge for over a quarter-century, James Dolan has grown increasingly concerned that the judiciary's independence is threatened by legislative micromanagement.

Now retired and able to assert his own independence—"being out of the judiciary has given me a sense of freedom of action that I didn't have when I was a member," Dolan says—he authored a hard-hitting Pioneer *White Paper* in 2002 detailing how the legislature's control of the court system's purse strings has resulted in unnecessary staffing, patronage, inequitable allocation of resources among the courts, and inefficient operation of the judiciary.

The evidence

▶ In just four years alone—between 1998 and 2001—a total of 416 court support positions (assistant clerks,

assistant registers, probation officers, and court officers) were created by the legislature—at a cost of more than \$50 million—but were never requested by court administrators. Many of these positions were filled by politically connected individuals; judges play no role in their hiring. "Patronage trumps planning," declares Dolan.

▶ The Boston Municipal Court—essentially a district court for the City of Boston—has 55 more employees and a budget more than double that of the busiest court in the state, Springfield District Court.

The guilty party

Dolan says the culprit is the legislature's practice of funding the judiciary through an extensive line-item budget. Massachusetts is the only state in the nation to use individual line items to

fund each of its courthouses. He notes that UMass, "with operating costs almost as high as the court system, is one line item." He recommends that the judiciary have the authority to manage its own operations through a lump-sum appropriation.

Spurring reform

Dolan's findings have generated significant movement toward reform.

▶ Urging a "revolution in the administration of justice," Supreme Judicial Court Chief Justice Margaret Marshall appointed a special task to study court operations.

▶ Newspapers around the state editorialized in support of reforms Dolan identified (see clippings below).

▶ Governor Romney has proposed reforms influenced by the Dolan study, targeting the Boston Municipal Court and sharply reducing the number of line items in the court's budget.

▶ Pioneer has partnered with a number of civic groups—the League of Women Voters, Common Cause Massachusetts, and the Massachusetts Applesseed Center for Law and Justice—to continue the push for judicial—and legislative—reform.

▶ For more about Pioneer's judicial reform initiative, visit www.pioneerinstitute.org/judicial.

Editorial Endorsement

BOSTON Herald
State's courts need a revolution

The Legislature's micromanagement of the courts and patronage control of personnel is producing huge inequities in judicial resources around Massachusetts. The Pioneer Institute released this one startling finding of a major study of the courts by James Dolan, a former judge in several district courts, to be published in the

MASSACHUSETTS LAWYERS WEEKLY

By definition, positions that never were requested by the Trial Court are not "mission critical" jobs. Without impugning the qualifications of any person who holds such a position, the core functions of the court system could continue without jobs that the courts never asked for.

The Enterprise

THE Pioneer Institute has an idea that will save Massachusetts taxpayers millions of dollars and won't have any effect on services: Just lay off all the patronage appointees to the court system and *voila*, savings of more than \$10 million a year.

The Boston Globe

STEVE BAILEY
Downtown

Managing the courts

James W. Dolan, a retired judge in the Dorchester District Court, has given us an excellent roadmap for reform in a study for the Pioneer Institute.

Union News.

Lawmakers court disaster creating patronage posts

ACHIEVING EFFICIENT GOVERNMENT IN OTHER WAYS...

Amtrak Pullout a Pioneer Victory

With a decision in mid-2002 by Amtrak not to rebid on the contract to operate the MBTA's commuter rail service, Pioneer's three-and-a-half year fight to open the commuter rail contract to true competition came to a successful end.



Amtrak has operated the system for 15 years. The last time the contract was up in 1999, the T attempted to open it to competitive bidding, but Amtrak and its powerful unions succeeded at confronting the MBTA with a dismal choice: stick with Amtrak or lose all federal funding—forcing the T to re-up with Amtrak, even though its bid was not only the highest but also the one judged to provide the lowest quality service.

Beginning in July 2003, a new transportation firm will run the trains, saving the T an expected \$50 million over the five-year contract term.

Competitive Contracting “Virtually Outlawed”

A decade-old state law has “virtually outlawed” competitive contracting of government services, a Pioneer study released in October 2002 concluded. The so-called Pacheco law—named for sponsor Sen. Marc Pacheco—is the most restrictive state privatization law in the country, according to the report (www.pioneerinstitute.org/research/whitepapers/wp19cover.cfm). Since the law was enacted, only six state services have been contracted out to private service providers, while the report notes the use of competitive contracting by governments is growing around the nation and achieving significant cost savings.

It urges repealing or amending the law so that state agencies can more easily pursue privatization initiatives that result in monetary savings and performance improvement. Numerous newspapers endorsed the idea, including the *Brockton Enterprise*, which covers Pacheco's district. Governor Romney has also proposed repealing the law.

The time has come to revisit privatization

—*Brockton Enterprise*

Repeal Pacheco Law

—*Lowell Sun*

The budget crunch requires privatizing

—*Boston Herald*

An Un-conventional Fire Sale?

Pioneer has long argued against building another convention center in Boston, citing shrinking demand and growing competition by other cities (see www.pioneerinstitute.org/about/e4epm/e4_conv.cfm). Bearing out Pioneer's research, only a

smattering of the predicted bookings have materialized for the taxpayer-subsidized \$800 million facility rising in South Boston.

In view of this, *Boston Herald* business columnist Cosmo Macero raised the possibility that “Pioneer Institute was right all along in labeling this thing a white elephant.” Over on the *Globe* op-ed page, columnist Joan Vennoch was more direct: “By 1999, the overly optimistic projections [of convention center backers] were debunked by the Pioneer Institute, [but] the institute was ignored and the costly project rolled forward.”

It's small consolation to say, “we told you so;” instead, recognizing reality, Pioneer is now calling for selling the smaller Hynes Convention Center. In addition to the one-time revenue from the sale, the Hynes' \$15 million annual state subsidy and the \$5 million it gets each year from Boston Common parking garage revenues could mitigate the cost of operating the new BCEC.



Governor Mitt Romney has embraced Pioneer's position that the Hynes should be sold, and the idea received a significant boost when the chair of the Convention Center Authority Board appointed a special task force to examine the market case for selling the Hynes. In addition, the current state budget eliminates the Hynes subsidy—a partial victory.

MBTA: Derailed by Expansion?

As the oldest public transit system in the country, the MBTA has significant modernization and maintenance needs. At the same time, it's engaged in a major expansion program.

Can the T do it all? No, says a 2002 study by the Massachusetts Taxpayers Foundation and Pioneer Institute (www.pioneerinstitute.org/crg/publications/crg_mbta.cfm). The report looks at a range of financial scenarios, but concludes that no matter what, MBTA finances won't stretch far enough to build all the planned expansion projects. In view of financial concerns, the T recently suspended construction of the South Shore's Greenbush commuter rail line.

The study, which won the Government Research Association's 2002 “Most Distinguished Research” award, recommends that the Commonwealth assume financial responsibility for expansion projects. This would allow policy-makers to weigh the benefits of transit projects within a state-wide transportation strategy.



In 2002, the first charter school connected to the Building Excellent Schools Fellowship opened its doors. The Fellowship, an initiative of Pioneer's Charter School Resource Center, is an intensive training program for aspiring charter school founders to help them create schools of outstanding quality.

From the first Fellowship class, Michael Mayo opened the Uphams Corner Charter School last September. Two of Mayo's Fellow colleagues were granted charters for schools to open this coming September. And in February 2003, four Fellows in the 2002-03 class were awarded charters.

Mayo's school offers an academically rigorous, rhetoric-centered education in the liberal arts and sciences. Beginning with 72 fifth graders, it will add a grade each year to become a middle and high school preparing students for college and to be "powerful, articulate, moral citizens, working for the benefit of all," he says.



Michael Mayo's dream to start a school ... in his own words

Ever since I was little, I've wanted to start a school. It's an unusual dream, but it's easy for me to see where this dream came from. School is where it *happens*, all of it—it's where our society decides what kind of people it wants and then gets them.

The town where I grew up has decided that children will have small classes and excellent, professionally trained teachers. But the city where I now live has decided that its children will get two new gigantic middle schools of about 750 students each. As a friend put it as we drove by the construction of one of them in my Dorchester neighborhood, "Why bother?"

I don't want merely to mitigate the inhuman conditions we impose on so many city students—I want to be part of something successful, sustainable, rational, human. I hate movies like *Stand and Deliver* about teachers in impossible circumstances who "make a difference," who provide "hope in the ashes." As Jonathan Kozol puts it, we get comfort from hope in the ashes, and then we keep piling on the ashes. Who wants to spend his life waiting? Not me. I think things can change, now. I am impatient.

So I returned to my dream—a public school that mixed the things I believed in in the right combination. And the greatest good luck brought me to the Massachusetts Charter School Resource Center, where people found my dream along with me. We spent a year of dreaming, challenging, writing, observing, and questioning, forcing me to iron out my ideas, realize their implications, turn them into a system. We did that for others, too, with far different dreams. They got far different results—schools as different as they are strong.

At the risk of sounding corny, I can say that the Uphams Corner Charter

I want city children to gain power to change the world around them. So what if they're three years below grade level in reading and math? That's what we're here for—to give them as good an education as their peers in the suburbs.

School is the school I'd always wanted. I want city children to gain power to change the world around them; for millenia, the study of rhetoric has taught students how to make their ideas responsible, clear, and powerful. Why not use that here?

So what if they're three years below grade level in reading and math? So what if they've never heard of the Acropolis? That's what we're here for—to give them as good an education as their peers in the suburbs. Latin and Socrates, astronomy, Eminem, and Nubian kingdoms—it's all fascinating and radically relevant to ten-year-old lives, if you can build it right.

—Excerpted from Pioneer's *Charter School Newsletter*, Summer 2002



Read more about the Uphams Corner Charter School online in ***Pioneering Spirit*** (www.pioneerinstitute.org/pdf/ps3_1prof.pdf) and in Pioneer's Charter School Newsletter (www.pioneerinstitute.org/pdf/csn8_2.pdf). More about the Fellowship and biographical sketches of the 2002-03 Fellows is available at www.pioneerinstitute.org/csrfellowship.

CHARTER SCHOOLS—FURTHER PROGRESS IN 2002

► **THE IDEA BEHIND** creation of charter schools was to spur competition among all public schools: that the loss of students from district to charter schools—taking with them their “per-pupil cost” in state funding—would provide an incentive for schools losing students to improve.

Since charter schools first opened in 1995, a transitional “crutch” has been provided to districts losing students through gradually diminishing reimbursements. In 2002, Governor Swift vetoed reimbursement funding—effectively returning the law to its original intent. Unfortunately, the move has increased opposition to charters and calls to slow new charter

openings. Pioneer is committed to maintaining the momentum of the charter school movement, which has promoted both educational choice and measurable academic success for students.

► **THE 2002 MCAS** results provide one barometer of charters’ academic performance. On average, Commonwealth charter schools outperformed their sending school districts by 3.7 points.

Charter schools shine on MCAS

Two charter schools (River Valley and Hilltown Cooperative) bested *all* school districts on the grade 7 English

exam. Among urban schools, Academy of the Pacific Rim was the third highest scoring high school in Boston—topped only by two exam schools—and Community Day in Lawrence tied for fourth highest score *statewide* on the grade 8 math exam. Sabis International in Springfield scored higher than all the city’s other high schools—25 points higher than the second ranked school in English and math combined.

For more MCAS results, visit www.pioneerinstitute.org/pdf/MCAS2002.pdf.

► **ANOTHER MEASURE** of educational achievement: over one-fourth of Roxbury Preparatory Charter School’s first eighth grade class, which graduated in June, gained admission and full scholarships to some of the area’s top independent schools, including Roxbury Latin, Deerfield Academy, Brooks School, Noble and Greenough, and Governor Dummer Academy. “Although such news may be routine at many private and suburban schools, at Roxbury Prep—whose student body is entirely black and Latino—it is cause for celebration,” says co-director Evan Rudall.



BILINGUAL EDUCATION OVERHAULED

In November, Massachusetts voters overwhelmingly approved a hotly-contested referendum question making “English immersion” the way to teach non-native students. Pioneer weighed in on the debate, sponsoring a pre-election forum with the Boston Municipal Research Bureau that featured chief referendum proponent Lincoln Tamayo, the Cuban-born former



Pioneer Forum speaker Lincoln Tamayo branded bilingual education a failure that has “segregated far too many of our children into native language classrooms for years on end before they are finally mainstreamed.”

Chelsea High principal, facing off against Rep. Peter Larkin, House chairman of the legislature’s education committee.

Larkin co-sponsored legislation overturned by the referendum that allowed districts flexibility in bilingual education; that law, approved earlier in 2002, replaced Massachusetts’ 31-year-old bilingual education statute—the first such state

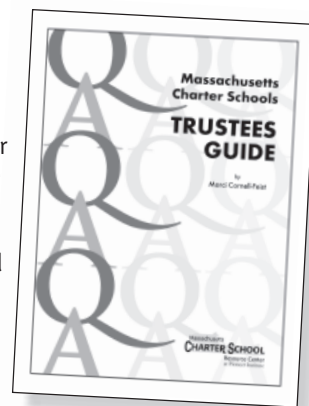
law in the nation—under which districts with 20 or more non-English students of the same language had to be taught courses in both English and their native language. Children generally stayed in the program for 3-4 years.

The referendum approved in November requires that non-English speaking children now be placed in intensive sheltered English immersion programs to learn English as quickly as possible—generally in one year. Once they are competent in English, they are moved to regular English-only classes.

Pioneer has had a long-standing interest in the issue. Our 1996 book *Bilingual Education in Massachusetts* recommended structured immersion as the best approach. Reform was also urged by Boston University education professor Charles Glenn in Pioneer’s *Agenda for Leadership 1998*.

Audio excerpts of the debate are online at www.pioneerinstitute.org/biling.cfm. A *Pioneering Spirit* post-election interview with Tamayo is available at www.pioneerinstitute.org/pdf/ps3_1qa.pdf.

A guidebook for charter school trustees published by the Pioneer’s Charter School Resource Center proved to be a best-seller. Presented in a Q&A format, the guide spells out “best practices” for board members to follow. Many of the lessons documented were gleaned from the center’s three-year Strengthening Boards of Trustees project.



Another of Pioneer's key areas of focus is increasing the wealth-creating potential of low- and moderate-income urban entrepreneurs in Massachusetts as one avenue to improving our inner cities. Below, we spotlight one such truly enterprising entrepreneur.

A Springfield entrepreneur on the move!

Ask Janice Brown (pictured) how many children she has, and she'll probably tell you "about sixty-five." Janice has three children of her own, but this Springfield, Massachusetts, businesswoman thinks of her customers as her children.

Janice is the owner of Youth on the Move, a company that provides transportation for those too young to drive themselves. The company has four vehicles (three vans and a station wagon) and provides pick-up and drop-off services for kids going to and from after-school programs, day care centers, athletic practices, and other supervised situations.

Janice and her four drivers are well known by the professionals at the schools and other institutions where Youth on the Move frequently picks up and drops off its charges. These relationships enable the company to serve as a communications channel between those professionals and parents who are too busy to have as much direct contact with them as they'd like.

"Our customers aren't just passengers that we drop off and don't think about again," she says. "We get to know them as individuals and get to know their teachers and parents. If your three-year-old comes home from day care in a bad mood, you won't have to wonder what happened—his driver will be able to tell you what kind of day he had."

The idea for Youth on the Move came to Janice a couple of years ago when a job in Connecticut made a 90-minute commute part of her daily routine. As a busy

single mother with a full-time job, she wasn't able to drive her kids around to the activities they wanted to participate in, but she felt it was important to provide them with access to enriching experiences outside the home. As she searched for a solution she realized there wasn't one readily available to parents in her situation, so she quit her job, put up a significant chunk of money, and started Youth on the Move in early 2001.

Customers started signing up almost immediately, and by spring it was clear that the minivan she started out with wasn't going to cut it. She was eventually able to take out a loan from the Urban League of Springfield's Community Focus Loan Fund.

The money borrowed was used to purchase more vehicles.

In the first year of business Janice was able to cover expenses, chiefly wages, insurance, debt payment, and vehicle maintenance. The business is now thriving, which Janice points out benefits the community beyond her client families. By providing "hand to hand" transportation for their children, Youth on the Move relieves parents of logistical worries during the workday, allowing them—the majority of whom work in Springfield—to be more productive on the job.

But the main thing for Janice is the benefit to the children themselves. "I don't want any child to not be able to take advantage of enriching opportunities in the community."

—Adapted from *Pioneering Spirit*, Spring 2002



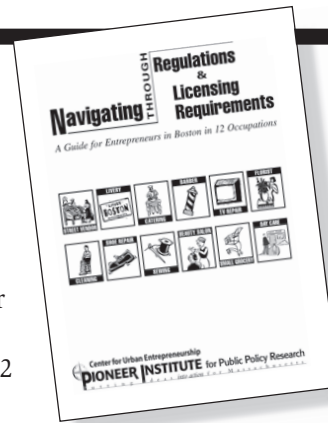
ENTREPRENEURSHIP BY THE BOOK

“Every year, thousands of small businesses get started in Boston....If you’re thinking of opening one of them, you should check out a new guide published by the Center for Urban Entrepreneurship at the Pioneer Institute.”

—“Bizlines” column, *Boston Herald*, April 18, 2002

Through the publication of “Navigating through Regulations & Licensing Requirements: A Guide for Entrepreneurs in Boston in 12 Occupations,” Pioneer gave an important assist in supporting entrepreneurship in Massachusetts’ largest city. The “how-to” guide is

designed to provide as understandable a grasp as possible of the requirements for starting a business in Boston, outlining the most efficient steps to full compliance with existing regulations. The business types covered are: at-home day care; barber shop; beauty salon; catering;



The guide—both in its entirety and by individual occupations—is available on the web at www.pioneerinstitute.org/entre/guide/boston.cfm.

cleaning service; flower shop; livery; sewing shop; shoe repair shop; small grocery store; street vendor; and TV/radio repair shop.

The publication has served a broader purpose: in surveying the extent of regulatory steps and agencies involved in some of even the simplest enterprises, it underscores the need for regulatory reform. Calling it “absolutely essential” for aspiring businesspeople, the *Herald* noted, “We just hope it isn’t too discouraging...reading all that’s required” of budding small businesses.

Pioneer is currently at work on expanding the guide to cover more occupations and more cities in Massachusetts.

ACADEMIC COLLABORATION

Pioneer’s Center for Urban Entrepreneurship (CUE) strengthened ties with area business schools through two projects in 2002.

▶ Thirty-one future entrepreneurs—students at **NORTHEASTERN UNIVERSITY**—attended a one-day course delivered jointly by CUE and the university’s Center for Technological Entrepreneurship. Instructors included prominent local entrepreneurs, a business legal assistance provider, and a community venture capitalist.

▶ A **BABSON COLLEGE** undergraduate student consulting team was awarded the Shelby Cullom Davis Entrepreneurship Prize for their work on a web-based licensing project for CUE.

The Babson team developed the business case and a preliminary design for using web technology to guide entrepreneurs through the complexities of the city and state licensing and permitting requirements. The center is currently working with several cities and towns to implement the project.

The prize, given annually to Babson

management students who produce the top project for a non-profit organization, was presented at an April ceremony by Diana Spencer, trustee of the Shelby Cullom Davis Foundation and a Pioneer board member.

Strengthening Partnerships for Inner-City Entrepreneurship



The third annual conference of Pioneer’s Center for Urban Entrepreneurship brought together numerous service organizations and funders involved with inner-city entrepreneurship to foster greater collaboration. Assistant VP Marilyn Weekes of the Federal Reserve Bank of Boston (upper left), where the conference was held, welcomed participants, as opening speaker Jay Kayne of the entrepreneurship-oriented Kauffman Foundation looked on. (Hear the remarks of each online at www.pioneerinstitute.org/cue_02.cfm.) Sponsored by Citizens Bank, the conference culminated in a roundtable discussion (upper right).

Tackling the health and human services “mess”

State Senator Susan Tucker—one of the staunchest advocates of government-provided human services to the state’s most vulnerable citizens—is on a mission: to streamline the bureaucracy responsible for that function.

“Nobody likes our current human service system. It’s a mess,” she declares, pointing to a map of Massachusetts showing all the various offices for the 15 agencies that deal with mental retardation, mental health, rehabilitation, medical assistance, health care finance and policy, social services, youth services, child care, veterans, the blind, deaf and hard of hearing, refugees, and immigrants. “If you total these up, there are 201 area, regional, and state offices—by and large *not* providing services,” she continues.

A Democrat who serves as the Senate chair of the legislature’s human services committee, Tucker is strongly allied

“Nobody likes our current human service system.”
—State Senator Susan Tucker

“It’s time to create an integrated, coordinated approach.”
—Study author Charles Baker, Jr.

with Pioneer Institute on the issue, speaking at a Pioneer conference in April 2002 on the human services workforce crisis (www.pioneerinstitute.org/about/e4ei/ei_hhs.cfm) and at the December release of a *White Paper* calling for a major overhaul of the Commonwealth’s \$9.5 billion health and human services (HHS) bureaucracy.

Study author Charles D. Baker, Jr., a former state HHS secretary and currently CEO of Harvard Pilgrim Health Care as well as a Pioneer board member, argues that the current structure—developed in an ad hoc fashion over time without an underlying view toward rationality—needs to be reshaped along “functional” rather than “product” lines. Under his proposal, the current constituent-based structure would be organized around information technology, licensing, investigations, purchased services,



White Paper author Charles Baker, Jr., outlining his restructuring plan, which won editorial support from the *Boston Herald*.



State Senator Susan Tucker with a map that calls the state’s human services bureaucracy “unconnected, unfocused, and uneconomical.”

administrative and financial operations, case management, and transitional assistance.

“It’s time to create an integrated, coordinated approach to client services and program management,” he told a packed Pioneer Forum on the report in December 2002.

Baker notes that different HHS agencies serve many of the same people, but do so in isolation. Integrating common functions, he argues, would dramatically improve the state’s ability to provide services and measure performance—and may uncover opportunities to generate additional federal matching funds. “This can’t be viewed as just another way to cut the budget,” he says. “The objective here is to recognize that something needs to be done to streamline, simplify, and integrate HHS operations and information.”

Governor Mitt Romney has proposed an overhaul of the HHS bureaucracy much along the lines suggested by Baker, who was serving as health committee chair of the Romney transition team when the study was released. It consequently received major coverage in the news media, including editorial support for its recommendations.



The study is available at www.pioneerinstitute.org/research/whitepapers/wp20cover.cfm. To hear excerpts of remarks by Baker and Tucker at the paper’s release, visit www.pioneerinstitute.org/baker.cfm.

Pioneer succeeded in getting issues of concern front and center in the recent election. The institute helped to frame the 2002 electoral debate through its candidates' briefing book, *Agenda for Leadership 2002* (www.pioneerinstitute.org/agenda), which outlined ten key issues facing the Commonwealth. One of those issues—regarding judicial administration (see page 2)—was posed to state senate candidates in a voters' guide published jointly by *The Boston Globe* and League of Women Voters. And a Pioneer Forum on bilingual education (see page 5) illuminated one of the most contentious referendum questions on the November ballot.



VOTERS GUIDE STATE SENATE

THE QUESTION:

What impact does the current line item budget process have on the independence of the judicial branch and what, if any, changes are needed? (30 word limit)

1st SUFFOLK
John A. Mart Jr. (D)
No reply received.

Walter R. Campbell (D)
Put the line item process in a legislative, not executive, method of government. The current process forces these two branches to work together to accomplish a common goal, neither branch is completely independent.

1st BRISTOL & PLYMOUTH
Juan M. Menard (D)
No reply received.

2d BRISTOL & PLYMOUTH
Mark C. Montigny (D)
No reply received.

2d HAMPSHIRE & HAMPSHIRE
Daniel A. Stockiewicz (D)
I believe the line item budget process may provide legislators who have an axe to grind with the judiciary with a mechanism through which they can avoid disputes over the judiciary.

4th MIDDLESEX
Robert A. Neaven III (D)
No reply received.

Mary Jane Hillery (R)
The current process dilutes the substance of the judicial branch. The Legislature appropriates the funds, the judiciary should determine how and where they are needed in the court system.

Christopher L.
I believe that the state executive enforce the Legislature's plans.

THE SALEM NEWS
Tough task awaits the next governor

The next governor, whether it's Republican Mitt Romney or Democrat Shannon O'Brien, will face daunting problems that will require a sharp turn from the way business has normally been conducted in the state.

A glance through a recent paper issued by the Pioneer Institute for Public Policy, "Framing the Issues Facing the Commonwealth," reveals instances of taxpayer abuse:

- "Despite recent budget cuts," it notes, "the Massachusetts court system is marked by rapidly rising costs, striking productivity declines, and systemic inequities in the distribution of resources." According to researchers, "Between 1998 and 2001, the Legislature mandated the creation of 416 (courthouse) positions never requested by the judiciary" at a cost to taxpayers of \$50.1 million. Does anyone have any doubts for whom those positions were "created in Massachusetts?"
- Then there's this: "Even after accounting for differences in labor costs and other variables, the commonwealth's convoluted public construction procurement process wastes over \$200 million in direct state government spending annually."
- And this: "Massachusetts is the only state in the nation that virtually prohibits contracting out to the private sector any service currently provided by state employees — a practice that has produced millions of dollars in savings in other states."

And the list goes on: Public facilities that are unneeded except by those whose jobs depend on their staying open. Questionable educational "incentives" provided under the Quinn Bill that the Legislature not only refuses to address, but is considering extending to firefighters.

As a candidate for governor, Mitt Romney advocated a number of Pioneer positions—on restructuring health and human services (see the facing page), selling the Hynes Convention Center (page 3), and increased reliance on competitive contracting in government (page 3), among others. Once elected, he turned to a number of "Pioneers" to help him accomplish his goals.

- Pioneer board member **PETER NESSEN** was named to fill a proposed new Cabinet post of education secretary.
- Serving as the governor's chief legal counsel is former District Court

Judge Winslow named chief legal counsel for Governor-elect Romney

Judge **DANIEL B. WINSLOW**, who initiated Pioneer's interest in judicial reform with his winning entry—"Justice Delayed" on the slow pace of civil cases through the court system—in Pioneer's 1998 Better Government Competition.

- Long-time Pioneer staff member **CHARLES CHIEPPO**, who directed the Shamie Center for Restructuring Government since its inception in 1997,

In a report written by Winslow in 1998, entitled "Justice Delayed," Winslow found Massachusetts' civil litigation system was among the slowest and most expensive in the nation. Winslow suggested ways to improve the court system while cutting costs to taxpayers and saving litigants and lawyers time and money. The report won the Better Government Competition sponsored by a Boston think tank, the Pioneer Institute for Public Policy Research.

—Walpole Times

Chieppo leaves Pioneer Institute for Romney admin.

A longtime critic of government inefficiency and waste, Chieppo saw signing on to the Romney administration as an opportunity to put what he's preached into practice. "I felt it was a moment in time," Chieppo said. "In 10 years being around this stuff, this was the best chance to get something done."

—Boston Business Journal

was appointed policy director in the Executive Office for Administration and Finance.

- Chairing the health committee of Romney's 97-member transition task force was Pioneer board member **CHARLES BAKER, JR.**, himself a

former Pioneer executive director.

- Another former executive director of the institute, **JAMES PEYSER**, is serving as an education advisor to Romney and is continuing as chair of the state Board of Education.

PIONEER'S Ways & Means

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 listed here who contributed to us during 2002. **Thank you all very much!**

Corporate, Foundation, and Other Organizational Supporters - 2002

Anonymous (3)	George E. Coleman, Jr. Foundation	Charles Hayden Foundation	Middlecott Foundation	SPS New England, Inc.
Acushnet Foundation	Croll Foundation Trust	Henderson Fund at The Boston Foundation	Millipore Foundation	State Street Foundation
Anchor Capital Advisors	Irene E. & George A. Davis Foundation	Hewitt Family Charitable Trust Fund at The Boston Foundation	Morgan-Worcester, Inc.	Sidney A. Swensrud Foundation
Arcadia Charitable Trust	Shelby Cullom Davis Foundation	HFL Foundation	National Grid U.S.A.	Transit Realty Associates
The Boston Foundation	Alice Willard Dorr Foundation	InfoGraphix	New York Community Trust	Herbert W. Vaughan Charitable Fund at The Boston Foundation
Boston Private Bank & Trust	Drew Consultants, Inc.	John Hancock Matching Gifts Program	Nonpublic Educational Services	Vertizon Corp.
Brookline Bancorp, MHC	Excelsior Foundation	David H. Koch Charitable Foundation	Opinion Dynamics Corp.	J.H. & E.V. Wade Fund at The Boston Foundation
Brunie Philanthropic Fund	Grantham, Mayo, Van Otterloo & Co.	L.T. & L. Resources Unlimited	Peggy Lawton Kitchens, Inc.	D.K. Webster Family Foundation
Butler's Hole Fund at The Boston Foundation	Hyde Russell Harrington Charitable Foundation	Mestek, Inc.	Retail Management & Development, Inc.	WKBJ Foundation
Cedar Street Foundation			Shattuck Charitable Trust	
Citizens Bank of Massachusetts			Slade Gorton & Co., Inc.	

Individual Supporters - 2002

Anonymous (7)	Mr. & Mrs. Clifford Brown	Mr. Gary L. Countryman	Mr. & Mrs. John J. Fifield	Mr. & Mrs. Frank Hoch
Ms. Evelyn Adams	Mr. David Brudnoy	Mr. & Mrs. Charles E. Cousins	The Hon. & Mrs. John H. Fitzpatrick	Mr. & Mrs. Steven G. Hoch
Mr. Stephen J. Adams & Ms. Barbara Colombo-Adams	Mr. & Mrs. Ralph Buglass	Mr. & Mrs. Fairman C. Cowan	Mr. Thomas J. Flatley	Drs. Fred & Carol Hochberg
Mr. Roger Altreuter	Mr. & Ms. Thomas D. Burns	Mr. & Mrs. Howard E. Cox, Jr.	Drs. Jeffrey & Eleftheria Flier	Mr. Robert J. Hogan
Mr. & Mrs. David B. Arnold, Jr.	Mr. & Mrs. Francis H. Burr	Mr. Joseph M. Cunningham, Jr.	Mr. & Mrs. Richard H. Forbes	Mr. Amor Hollingsworth
Dr. Rafik Attia	Mr. & Mrs. F.A. Butler	Mr. & Mrs. Lloyd C. Dahmen	Mr. William B. Gannett	Mr. & Mrs. James Hollis
Mr. & Mrs. Charles D. Baker, Sr.	Dr. & Mrs. Marcus Byruck	Mr. Bruce G. Daniels	Mr. & Mrs. John L. Gardner	Mr. & Mrs. J. Murray Howe
Mr. & Mrs. Charles D. Baker, Jr.	Mr. & Mrs. James F. Carlin	Mr. & Mrs. Nijanand P. Datar	Mr. M.D. Gardner	Mr. Richard J. Howell
Mr. & Mrs. William N. Bancroft	Mr. Alan G. Carr	Mr. & Mrs. Charles H. Davis II	Mr. Andrew M. Garland	Mr. James S. Hughes
Mr. & Mrs. William A. Barnstead	Mr. & Mrs. Joseph R. Carter	Mr. & Mrs. Robert L. Day	Mr. Arnold Garrison	Mr. & Mrs. Robert W. Hungate
Mr. & Mrs. Christopher T. Barrow	Mr. James T. Chadwick	Dr. & Mrs. Francis de Marneffe	Mr. & Mrs. Dale N. Garth	Mr. & Mrs. Richard M. Hunt
Mr. David Barry	Mr. John D. Chambliss	Mr. & Mrs. David Dearborn	Prof. Joseph M. Giglio, Jr.	Mr. Richard M. Hurd
Mr. George S. Bass	Ms. Carol Chandler	Dr. & Mrs. Edwin J. Delattre	Mr. John A. Gilmartin	Mr. & Mrs. Robert S. Hurlbut, Jr.
Mr. & Mrs. Henry Bass	Mr. & Mrs. Melville Chapin	Mr. John DeVillars	Mr. Brian R. Gilmore	Ms. Sally D. Hurlbut
Mr. & Mrs. Duane Batista	Mr. & Ms. Cornelius J. Chapman, Jr.	Mr. & Mrs. Gary T. DiCamillo	Mr. & Mrs. Fred L. Glimp	Mr. & Mrs. M.H. Jacobson
Mr. Philip C. Beals	Mr. & Mrs. Neil Chayot	Mr. & Mrs. David F. Dietz	Mr. & Mrs. Richard Goldberg	Dr. & Mrs. William James
Mrs. Elizabeth C. Beck	Mr. & Mrs. Frederic C. Church, Jr.	Mr. John B. Dirlam	Mr. Paul S. Goodof	Dr. & Mrs. Eric H. Johnson
Mr. & Mrs. Martin Begien	Mr. & Mrs. Thomas M. Claflin II	Mr. Todd Domke	Mr. Stephen G. Gormley	Dr. & Mrs. Robert G. Johnson
Mr. Everett E. Berg	Mr. & Mrs. Lewis Clark	Mr. & Mrs. J.J. Dorgan	Ms. Rosalind E. Gorin & Dr. Matthew Budd	Ms. Sara Johnson
Mr. David J. Berkland	Dr. & Mrs. Melvin Clouse	Mr. & Mrs. W.S. Dornette	Mr. R.J. Grantham	Mr. & Mrs. C. Bruce Johnstone
Mr. & Mrs. Eric S. Berman	Mr. & Mrs. Alan M. Cody	Mr. Alfred B. Downes	Dr. & Mrs. Morris Gray	Mr. & Mrs. Arthur Kalotkin
Mr. & Mrs. Philip W. Bianchi	Mr. & Mrs. Peter B. Coffin	Mr. & Mrs. Walter L. Downey	Mr. & Mrs. Jerome Grossman	Mr. & Mrs. George S. Kariotis
Mr. & Mrs. Robert F. Birch	Mr. James W. Coghlin, Sr.	Mr. Joseph D. Downing	Mr. & Mrs. Theodore C. Haffenreffer, Jr.	Mr. & Mrs. William Kaufmann
Mr. & Mrs. R. William Blasdale	Mr. Jeremiah Cole	Mr. & Mrs. Kingsley Durant	Mr. Gordon Hall III	Dr. & Mrs. Gary P. Kearney
Mr. & Mrs. Robert H. Bradley	Mr. Ferdinand Colloredo- Mansfeld	Mr. & Mrs. Wesley H. Eaton	Mr. John Hanafin	Mr. & Mrs. James Keeney
Mr. Lawrence D. Bragg III	Mr. & Mrs. James M. Colman	Mr. William S. Edgerly	Mr. Frederick C. Hapgood	Mr. & Mrs. James B. Kenary, Jr.
Mrs. Mary D. Bragg	Mr. Thomas H. Connors	Dr. Richard H. Egdahl	Mr. John Harrington	Ms. Martha King
Mr. & Mrs. Stephen Braude	Mr. William G. Constable	Mr. & Mrs. William Elfers	Mr. & Mrs. Scott Hartz	Dr. & Mrs. Harold J. Kosasky
Mr. & Mrs. F.G. Brigham, Jr.	Dr. Paul W. Cook Jr.	Mr. Russell L. Epker & Ms. Ann Percival	Mr. Robert P. Henderson	Mr. Stanley Kruszewski
Mr. & Mrs. H. Day Brigham, Jr.	Mr. & Mrs. T.J. Coolidge	Mr. Michael A. Ervolini	Mr. Bruce Herzfelder	Mr. & Mrs. Edward H. Ladd
Mr. Edgar H. Bristol	Mr. & Mrs. Lawrence Coolidge	Mr. & Mrs. David C. Evans, Jr.	Mr. & Mrs. Colby Hewitt, Jr.	Mr. & Mrs. Warren C. Lane, Jr.
Mr. E.M. Brown	Mr. & Mrs. John L. Cooper	Mr. & Mrs. Geoffrey C. Farnum	Rep. Lucille Hicks & Mr. William C. Hicks	Mrs. Catherine R. Laramie
Mr. Jacob F. Brown II	Dr. & Mrs. Evan Coravos	Mr. Steven S. Feinberg	Mr. & Mrs. Arthur R. Hilsinger	Mr. & Mrs. Robert A. Lawrence
		Mr. & Mrs. Carl Ferenbach III		Mr. & Mrs. John W. Learnard
		Mr. & Mrs. Alan S. Fields		Mr. Douglass B. Lee, Jr.
				Mr. Alan L. Lefkowitz & Ms. Elizabeth F. Potter

First-time supporter

We endeavor to make this an accurate listing of donors during calendar year 2002. Please inform us of any omissions or corrections...

Individual Supporters - 2002 (continued)

Mr. & Mrs. Edmund F. Leland III
Mr. Frank Licata
 Mr. & Mrs. Charles Longfield
 Mr. & Mrs. Caleb Loring, Jr.
 Mr. & Mrs. George M. Lovejoy, Jr.
 Mr. & Mrs. John Lowell
 Mr. Laurens Maclure
 Mr. & Mrs. George Macomber
 Mr. & Mrs. David B. Maddox
 Mr. & Mrs. John F. Magee
 Mr. Wilson K. Magee, Jr.
 Mr. Eli Manchester, Jr.
 Mr. Louis J. Maret
 Mr. Lawrence J. Marks
 Dr. & Mrs. Edwin P. Maynard III
 Mr. & Mrs. Henry F. McCance
 Mr. William C. McConnell, Jr.
 Mr. & Mrs. Thomas P. McDermott
 Mr. & Mrs. Leland McDonough
 Mr. & Mrs. Arthur P. McGinnes
 Mr. & Mrs. John McKey
 Mr. & Mrs. Robert F. McKown
 Mr. & Mrs. Stephen Mead, Jr.
 Mr. Francis X. Meaney
 Mr. & Mrs. William C. Mercer
 Mr. Roger Milliken
 Mr. Jack E. Molesworth
 Ms. Sandra O. Moose
 Mr. James F. Morgan
 Mr. & Mrs. G. Marshall Moriarty
 Mr. & Mrs. Alan R. Morse, Jr.
 Mr. David H. Morse & Ms. Susan McWhinney-Morse
 Mr. & Mrs. Kenneth Morse
 Mr. & Mrs. Carl M. Mueller
 Mrs. Shirley M. Muirhead
 Mr. Samuel M. Mundel
 Mr. Frederick O. Muzi
 Mr. & Mrs. Marc Myers
 Mr. & Mrs. John M. Nelson
 Mr. & Mrs. Peter Nessen
 Dr. & Mrs. David A. Newton
 Mr. Guy W. Nichols
 Ms. Kit J. Nichols
 Mr. Rodger P. Nordblom
 Mr. & Mrs. Warren Norquist
 Mr. & Mrs. Gilbert E. O'Connell
 Mr. Thomas L.P. O'Donnell
 Mr. & Mrs. John P. O'Leary
 Mr. Richard T. O'Rourke
 Mr. David Parker
 Ms. Karen Parker
 Mr. & Mrs. Joseph F. Patton, Jr.
 Mr. & Mrs. John B. Pepper
 Mr. & Mrs. Faeltton C. Perkins, Jr.
 Mr. & Mrs. H. Bradlee Perry
 Mr. Samuel D. Perry
 Mr. & Mrs. Daniel S. Peters
 Mr. & Mrs. Lovett C. Peters
 Mrs. Gayle L. Peters-Coates & Mr. Ned S. Coates

Prof. & Mrs. Harold A. Petersen
 Mr. James A. Peyser & Ms. Mindy D'Arbeloff
 Mr. & Mrs. Daniel A. Phillips
 Dr. & Mrs. Arthur S. Pier, Jr.
 Mr. Ted Pietras
 Mr. & Mrs. David E. Place
 Dr. & Mrs. Philip J. Porter
 Mr. & Mrs. David G. Powell
Mr. Tom Pyle
 Mr. & Mrs. Donald P. Quinn
 Dr. & Mrs. Mitchell T. Rabkin
 Mr. Bruce C. Ramsey
 Mr. John Reed
 Mr. Timothy W. Richards
 Dr. & Mrs. Stephen L. Richter
 Mr. & Mrs. Mark V. Rickabaugh
 Mr. & Mrs. William M. Riegel
 Mr. Michael Robbins
 Mr. & Mrs. John E. Rodgers
Mr. Joseph V. Roller II
 Mr. & Mrs. Henry B. Rose
 Mr. & Mrs. Alvan F. Rosenberg
 Mr. & Mrs. David Roth
 Mr. & Mrs. W. C. Roth
 Prof. & Mrs. Stanley Rothman
 Mr. & Mrs. Jean J. Rousseau
 Mr. & Mrs. John W. Rowe
 Mr. & Mrs. Edward I. Rudman
 Dr. & Mrs. Paul S. Russell
 Dr. William E. Russell
Mr. & Mrs. John C. Rutherford
Mr. Robert Ruzzo
 Mr. & Mrs. William L. Saltonstall
 Mr. & Mrs. Maurice R. Samuels
 Mr. & Mrs. Michael R. Sandler
 Mr. & Mrs. Lee Sandwen
 Mr. Robert V. Sartini
 Dr. William C. Sawyer
 Dr. John A. Schemmer
 Prof. & Mrs. Richard Schmalensee
 Mr. & Mrs. Charles W. Schmidt
 Dr. & Mrs. Marvin G. Schorr
 Mr. Daniel J. Schwinn
 Mr. & Mrs. David W. Scudder
 Mr. & Mrs. Bruce Seddon
 Mr. Roger T. Servison
 Mrs. Edna Shamie
 Mrs. Henry B. Shepard, Jr.
 Mr. & Mrs. Ross E. Sherbrooke
 Mr. & Mrs. Richard H. Shreve
Mr. Mark F. Sieffert
Ms. Suzanne Sigman
 Mr. & Mrs. Richard N. Silverman
 Mrs. Charlotte Smith
 Mr. Verity C. Smith
 Mr. & Ms. Eliot I. Snider
 Mr. Stanley W. Snider
Mr. & Mrs. Jim Spady
 Mrs. Diana Davis Spencer

Mrs. Helen S. Spencer
 Mr. David A. Spina
 Mr. Shepard A. Spunt
Mr. Jack Spurr
 Dr. & Mrs. Walter T. St. Goar
 Mrs. Phyllis Stearns
 Mr. & Mrs. Alan Steinert, Jr.
 Mrs. Ruth P. Stephenson
 Mr. David B. Stone
Dr. Thomas P. Stossel
 Mr. & Mrs. Frederic A. Stott
Mr. & Mrs. William Strong
 Mr. William F. Sullivan
 Mr. Philip H. Suter
 Mr. Carl V. Swanson
 Mrs. Arlette B. Swift
 Mr. E. K. Swift, Jr.
 Mr. Edwin J. Taff
 Mr. Hooker Talcott, Jr.
 Mr. & Mrs. James C. Taylor
 Ms. Alice Thompson
 Mr. & Mrs. William Thompson
 Mr. & Mrs. John L. Thorndike
 Mr. & Mrs. W. N. Thorndike
 Mr. & Mrs. Frederick G.P. Thorne
 Prof. & Mrs. Serge N. Timasheff
 Mr. Fred Tirrell
 Mr. & Mrs. Peter G. Torkildsen
Mr. Thomas Trimarco
 Mr. & Mrs. Richard Tucker
 Mr. Martin D. Turpie
 Mr. & Mrs. William B. Tyler
Mr. Carl Valeri
 Mr. & Mrs. Walter Van Dorn
 Mr. Larry C. Van Heerden
 Ms. Rose-Marie van Otterloo
 Dr. & Mrs. Gordon C. Vineyard
 Mr. Jephtha H. Wade
Mr. & Mrs. Richard Walker, Jr.
 Mr. & Mrs. Monte J. Wallace
 Mr. & Mrs. Bayard Waring
 Mr. David Z. Webster
 Mr. & Mrs. Dean K. Webster
 Mr. & Mrs. Kingman Webster
 Mr. & Mrs. Sinclair Weeks, Jr.
 Mr. David H. Weener
 Mr. & Mrs. Kurt E. Weisenbeck
 Mr. Walter Weld
 Mr. & Mrs. John S. Wells
 Dr. & Mrs. Douglas F. Welpton
 Mr. Robert G. White
 Mr. & Mrs. Peter O. Wilde
 Mr. & Mrs. Allen D. Willard
 Mr. Leonard A. Wilson
 Mr. David E. Winship
 Mr. Lee Marc G. Wolman
 Mr. & Mrs. R. Norman Wood
 Dr. & Mrs. Edward F. Woods
 Mr. & Mrs. David B. Wray
 Mr. Jack Wrobel
 Mr. & Mrs. Franklin Wyman, Jr.
 Dr. & Mrs. Othar Zaldastani

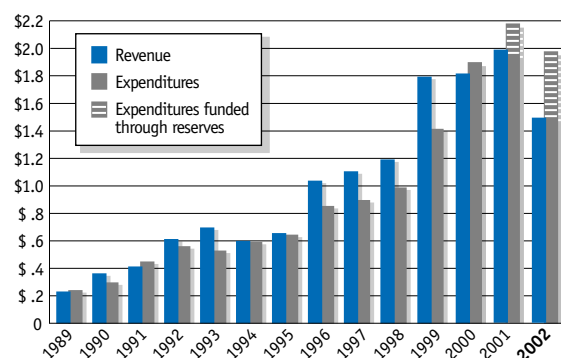
Pioneer Institute Finances - 2002

Reflecting the state of the economy, Pioneer weathered a very challenging financial situation in 2002. The institute nonetheless succeeded in raising nearly \$1.5 million, the bulk of which came from the loyal supporters listed on these pages.* The institute's revenues, along with cash reserves and restricted reserves ear-marked for planned programs, funded closely monitored expenditures of just under \$2 million.

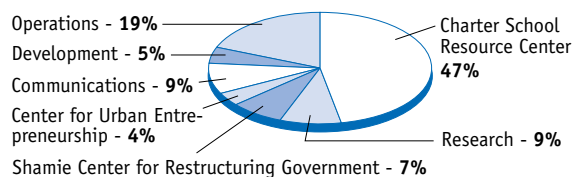
To ensure that our donors receive the best possible return on their investment in Pioneer, more than three-quarters of the institute's expenditures in 2002 went directly to programs, research, and outreach—our primary mission.

*Pioneer neither seeks nor accepts any federal, state, or local government funding.

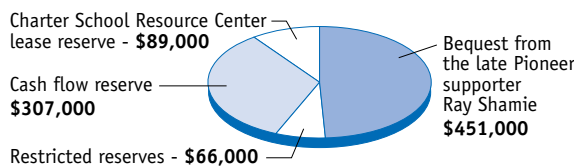
Revenues/Expenditures by Year (in millions of \$)



Expenses by Program



2002 Year-end Current Assets



The data presented here are unaudited. Pioneer's financial records are audited annually by Glenn Ricciardelli, P.C. The fiscal year 2002 audited financial statement will be available upon request later this year.

...and accept our sincere apologies for any oversight.

First-time supporter

Pioneer Governance



Founding Chairman

LOVETT C. "PETE" PETERS founded Pioneer in 1988 after a long business career in energy and banking. A 1936 Yale graduate, he is the longest standing trustee for the Foundation for Economic Education, a member of the Mont Pelerin Society, and a trustee of Hillsdale College. He is the recipient of many

honors and awards, most recently the Roe Award from the State Policy Network and, with his wife, Ruth Stott Peters, the Champions of Freedom Award from the Mackinac Center for Public Policy.



Chairman

COLBY HEWITT, JR., has been Chairman of Pioneer since 1997. For 45 years he led Aon Risk Services (Massachusetts), an insurance business in Boston. A Harvard graduate, he has devoted many years to Massachusetts education (as Past Chairman, Hampshire and Wheelock Colleges; Life Trustee, Northeastern University; and Treasurer, Dexter School). His service

as a board member of Beth Israel-Deaconess Hospital and past Chairman of Deaconess Hospital has provided Mr. Hewitt with considerable experience in health care issues.

President/Chief Executive Officer

STEPHEN J. ADAMS has nearly 20 years experience in state government, public policy research, public finance, regulatory reform, and business development strategy. Formerly Pioneer's Executive Director, he was promoted to his current position in early 2003. He joined Pioneer in 2001 as Director of its Center for Urban Entrepreneurship. Previously, he was vice president and director of research and strategy for the Initiative for a Competitive Inner City, a national non-profit dedicated to inner-city revitalization. Mr. Adams also served in state government as Assistant Treasurer for Debt Management for the Commonwealth of Massachusetts, and as Maine's Director of Planning. He received his bachelor's degree from Queen's University in Kingston, Ontario, Canada, and a Master of Public Administration degree from Pennsylvania State University.



Board of Directors

- **COLBY HEWITT, JR.**, *Chair*
- **STEPHEN J. ADAMS**, President/Chief Executive Officer, Pioneer Institute
- **CHARLES D. BAKER, SR.**, Professor of General Management, Northeastern University; former Undersecretary, U.S. Department of Health and Human Services
- **CHARLES D. BAKER, JR.**, Chief Executive Officer, Harvard Pilgrim Health Care; former Massachusetts Secretary for Administration and Finance and of Health and Human Services
- **NANCY MYERS COOLIDGE**, co-founder, Citizens United for Charter Schools
- **GARY L. COUNTRYMAN**, Chairman Emeritus, Liberty Mutual Group
- **WILLIAM S. EDGERLY**, Chairman, Foundation for Partnerships; Chairman Emeritus, State Street Corp.
- **DAVID C. EVANS**, Principal, Congress Street Research
- **JOHN J. FIFIELD**, Managing Director, Venture Enterprises
- **GEORGE M. LOVEJOY, JR.**, former Chairman and President, Meredith & Grew, Inc.
- **PATRICIA A. MADDOX**, former Director of Development, Pioneer Institute
- **THOMAS P. MCDERMOTT**, Executive in Residence, Babson College Institute for Latin American Business; retired Managing Partner, Ernst & Young New England
- **PETER NESSEN**, Chairman, NCN Financial Corp.; former Massachusetts Secretary for Administration and Finance
- **LOVETT C. PETERS**, Founding Chairman, Pioneer Institute
- **DIANE SCHMALENSEE**, President, Schmalensee Partners
- **DIANA SPENCER**, Chairman of Gifts, Shelby Cullom Davis Foundation
- **DAVID A. SPINA**, Chairman and Chief Executive Officer, State Street Corp.
- **JOHN LARKIN THOMPSON**, of Counsel, Nutter, McClennen & Fish, LLP; former President and CEO, Blue Cross Blue Shield of Massachusetts
- **FREDERICK G.P. THORNE**, former Chairman of the Board, Chief Investment Officer, and Managing Director, Harbor Capital Management Co., Inc.
- **WILLIAM B. TYLER**, of Counsel, Rackemann, Sawyer & Brewster (formerly President)
- **R. KINGMAN WEBSTER**, President and Treasurer, "I Have A Dream" Foundation—Lawrence, MA, chapter
- **EDNA SHAMIE**, *honorary*
- **PHYLLIS M. STEARNS**, *honorary*

We wish to express deep appreciation to each and every member of the boards shown here for volunteering their time and contributing their expertise.

Board of Academic Advisors

- | | |
|---|---|
| • BRIGITTE BERGER
Boston University | • LAURENCE J. KOTLIKOFF
Boston University |
| • ROBERT M. COSTRELL
UMass-Amherst | • HARVEY C. MANSFIELD, JR.
Harvard University |
| • NATHAN GLAZER
Harvard University | • JEFFREY A. MIRON
Boston University |
| • JEROME H. GROSSMAN
Harvard University | • RICHARD SCHMALENSEE
Massachusetts Institute of Technology |
| • HOWARD HUSOCK
Harvard University | • ABIGAIL THERNSTROM
Manhattan Institute |
| • JONATHAN B. IMBER
Wellesley College | |

Massachusetts Charter School Resource Center Advisory Board

- | | |
|------------------------------|------------------------------|
| • NANCY ANTHONY | • ED KIRBY |
| • MARIO BORUNDA | • STEPHEN KRAMER |
| • BARBARA HAYES BUELL | • THOMAS P. MCDERMOTT |
| • SCOTT IZZO | • KINGMAN WEBSTER |

Shamie Center for Restructuring Government Advisory Board

- | | |
|------------------------------------|--------------------------------|
| • CORNELIUS J. CHAPMAN, JR. | • JOSEPH M. GIGLIO |
| • TAMARA P. DAVIS | • BRUCE HERZFELDER |
| • JOSEPH D. DOWNING | • ROBERT MELIA |
| • DARIUS W. GASKINS, JR. | • JOHN O'LEARY |
| | • PAUL S. RUSSELL, M.D. |

Center for Urban Entrepreneurship Advisory Board

- | | |
|-------------------------|--------------------------|
| • ASHEESH ADVANI | • GRESH LATTIMORE |
| • ERIKA EURKUS | • ALVARO LIMA |
| • JUAN EVERETEZE | • MAYTE RIVERA |
| • JOHN FRIAR | • PEG RYAN |
| • ERIC KORSH | • BETSY WEAVER |

Pioneer Staff



LINDA BROWN has been Director of the Massachusetts Charter School Resource Center at Pioneer Institute since 1993, working directly with existing charter schools and aspiring charter school founders to foster the success of charter schools. She previously held the position of associate head of school at an independent school.



RALPH BUGLASS is Pioneer's Director of Communications. Before joining Pioneer in 1999, he produced publications for the institute and other clients on a freelance basis. He also has been Director of Publications for the World Affairs Council of Boston, Newsletter Manager for a national health care company, and News Bureau Manager at Tufts University. An American history graduate of Cornell University, Mr. Buglass also has a master's in journalism from American University.



MORRIS GRAY is Pioneer Institute's Treasurer. A Harvard graduate ('43, MBA '47), he was previously a vice president at State Street Bank. Mr. Gray is an overseer for the Huntington Theater Company and WGBH, Life Trustee of the Museum of Science, Corporate Trustee of the Trustees of Reservations, and Trustee of the USS Constitution Museum.



DANIELLE HARRELL is Program Coordinator at Pioneer's Charter School Resource Center. She holds a music education degree from SUNY-Potsdam. Before joining Pioneer in 2001, she taught in the Boston Public Schools, initiated a string instrumental program at the Mission Hill Elementary School, and was a program associate at the Community Music Center of Boston, where she continues to teach cello.



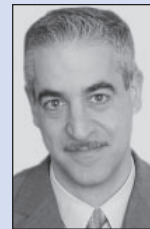
SUSAN HOOPES is Director of Operations at Pioneer. Before joining Pioneer in 1999, Ms. Hoopes was the Business Manager for the Institute on Disability, a program affiliated with the University of New Hampshire. She received her bachelor's degree from the Whittemore School of Business and Economics at UNH and has been employed in the field of business management for the past 15 years.



SHAWNI LITTLEHALE is Research Associate at the Shemie Center for Restructuring Government. Associated with Pioneer since 1997, she is the driving force behind the institute's Better Government Competition, which underwent a retooling in 2002. (The next awards will be presented in June 2003.) Ms. Littlehale worked in state government during the Weld administration as Director of Privatization Research and was a member of the Administration and Finance strategic planning and policy team. A government graduate of Wheaton College, she also has been a consultant to the MBTA on cost-cutting measures.



We acknowledge the many contributions in 2002 of Shemie Center for Restructuring Government Director **CHARLES CHIEPPO** (left), who left Pioneer after seven years to join the Romney administration (see page 9), and **JAMES STERGIOS**



(right), who has moved on to an entrepreneurial venture after serving as the institute's Research Director for the past two years.

ELENA LLAUDET is Research Associate at Pioneer Institute. A 2000 graduate of the University of Barcelona in Spain, she holds a degree in economics and business management. Ms. Llaudet joined Pioneer in 2001 and has been involved in research on housing, health and human services, judicial administration reform, and other institute studies.



MICHAEL KANE is Operations Associate at Pioneer. A 2002 graduate of Boston College, he interned as a research assistant at Pioneer while in college. He has written for the institute's *Pioneering Spirit* magazine and is also co-author of the Center for Urban Entrepreneurship handbook *Navigating through Regulations & Licensing Requirements*.



ANTONIA RUDENSTINE is the Building Excellent Schools Fellowship Program Director at the Massachusetts Charter School Resource Center. She joined Pioneer in 2000 as a consultant working with charter school leaders to improve teaching and learning. Ms. Rudenstine, who holds a doctorate in education from Harvard, previously was a founding teacher and administrator in a public alternative high school in New York City and has supervised teachers-in-training both in New York and Boston.



MARK SIEFFERT, Development Coordinator at Pioneer, was promoted to his present position shortly after joining Pioneer in 2002 as Development Associate. A 1998 magna cum laude graduate of Bowdoin College, he has several years of fundraising experience at Delbarton School, a parochial school in Morristown, New Jersey.



ALLA YAKOVLEV is Program Manager at the Center for Urban Entrepreneurship. Her previous experience includes eight years coordinating international projects aimed at fostering a conducive environment for small business through corporate-community partnerships. Ms. Yakovlev joined Pioneer in 2000 as a research associate after working as a project manager for the Prince of Wales Business Leaders Forum in the U.K. She holds two master's degrees from Boston University, one in education administration and the other in instructional design.

