## 2003 ANNUAL REPORT PIONEER INSTITUTE 15<sup>TH</sup> ANNIVERSARY





Pioneer Institute proudly marked its 15th anniversary in 2003. 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, primarily in the K-12 education system.

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

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

**E**merging 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 2003.

#### FROM THE CHAIRMAN & FOUNDING CHAIRMAN

Pioneer Institute believes in transparency and accountability. We believe government must be accountable. We believe Pioneer is accountable to our supporters.

It is timely, therefore, to comment on Pioneer's use of its operating funds. They *all* come from private sources, none from government. These funds have made possible the even, unbroken production of useful and reforming research. Our 2003 research is summarized in this annual report.

Pioneer has continued in its Yankee style, in a simple but central location. Much of our equipment and furnishings were pre-owned and donated to us. Our staff of volunteers and professionals has grown

in our 15 years from two to only 12. Our office at 85 Devonshire Street has just 220 square feet per person,

including common areas. Pioneer is an enviable model of management moderation, as the 2003 financial accounting on page 11 demonstrates.

In fact, Charity Navigator, which evaluates over 2,800 nonprofit organizations nationwide, finds Pioneer "exceeds or meets industry standards and performs better than most charities in its cause" and rates our "organizational efficiency"



Chairman Colby Hewitt



Founding Chairman Lovett C. Peters

as "exceptional." We are very proud of this external, independent assessment of the institute's efficacy.

As we approached our 15<sup>th</sup> year, we were indeed fortunate to bring in Stephen Adams as President/ CEO. This reflected a change in our organizational structure, and it is working out well. In the past two years, Steve has materially and substantively increased Pioneer's public presence. He has appeared on TV programs such as "Greater Boston" on WGBH and "NewsNight" on New England Cable News. He is also quoted frequently in the *Boston Globe*, *Herald*, *Boston Business Journal*, Worcester *Telegram* 

& *Gazette*, and writes a monthly column for the Lowell *Sun*. Pioneer benefits from his prior public sector experience in finance and planning (in Massachusetts and Maine, respectively). With his leadership, we have

enhanced our commitment to "putting ideas into action." We hope this accounting of our work in 2003 will prompt increased private funding.

## Constrain Rovette Peters

#### FROM THE PRESIDENT / CHIEF EXECUTIVE OFFICER

**P**ioneer Institute's 15<sup>th</sup> anniversary year, 2003, was one of unique opportunity and significant movement forward, while also a time of refocusing on our core mission.

A new reform-minded governor embraced many of Pioneer's long-standing ideas for improving state government. Pioneer research on a wide range of issues—a judiciary free of legislative micromanage-

ment ... competitive contracting of services ... governmental restructuring ... public construction reform, among others figured in many of the new administration's proposals. The idea of limited, more efficient government in Massachusetts received its most extensive public airing in a decade and seems to have won over many more supporters among citizens and opinion shapers. In fact, a recent UMass poll found a whopping 86 percent of state residents now rate state government reform as important.

The large budget shortfall the state faced last year contributed to a new receptivity to new ideas. As former Democratic state senator Patricia McGovern said in an interview in our *Pioneering Spirit* magazine, "When times are difficult, profound structural changes can be made. It's



Stephen Adams President/CEO

an opportunity to take a hard look at things in new and creative ways." We at Pioneer agree and focused much energy at using the opportunities presented in 2003 to advance the creative thinking that our research represents.

We had some successes, as you'll read about. Much remains to be done. We are not discouraged but rather re-energized in our core mission of chang-

ing the intellectual climate in the Commonwealth. It's a slow process, but we're making inroads. It requires returning to our roots of offering solid, credible research—as evidenced by a refocusing of our work in education reform.

This past July, our charter school resource center became an independent organization to focus on—as its new name says—the nitty-gritty work of "building excellent schools." Meantime, Pioneer is at work on a major new research initiative on the efficacy of school vouchers as the next "frontier" in enhancing school choice and spurring real improvement in K-12 public education.

Stephen allons

The aim was to change the intellectual climate of Massachusetts. Little did I know then, some 15 years ago, with what I was getting involved. Looking back, it is nothing short of astonishing what Pioneer has accomplished.

People going into government! Policy initiatives that had their origin in Pioneer work being taken up by the state! The Better Government Competition now being emulated in a number of other states! Position papers! Lectures! Policy forums! The list is long and continues to grow....

Has the intellectual climate of Massachusetts changed? The answer is so apparent that the question is obviously rhetorical."

---Charles D. Baker, Sr., a founding member of Pioneer Institute's Board of Directors, at his final board meeting in June 2003, when his term expired.

I want to express my gratitude for all the work the Pioneer Institute has done to promote efficient, effective and accountable government. This effort has been enormously helpful to my administration [and] has helped us follow through on our promise to promote change.

Please keep the good ideas coming. With your help, we can continue to put forth out-of-the-box ideas that will change the way business is done on Beacon Hill and make government work better for the Commonwealth."

> -Governor W. Mitt Romney, in an April 17, 2003 letter to Pioneer Institute. The governor later spoke at Pioneer's Better Government Competition Awards Dinner in June.

## The Boston Globe

March 17, 2003

# Pioneer group's voice grows stronger

## Think tank's influence seen in Romney plans

By Yvonne Abraham GLOBE STAFF

It was founded in 1988 as a reaction against state government, a critical voice blaming the Beacon Hill of Governor Michael S. Dukakis for Massachusetts' fiscal crisis. Its founders called for an overhaul of the way the state does business, and opening government services up to competition. And as institute members will readily admit, nobody was paying much attention to them back then.

Now, 15 years later, the Pioneer Institute is an influential voice in state politics, more a part of the political scene on Beacon Hill than ever. Its members have been tapped for influential roles in Governor Mitt Romney's administration.

The institute's core policies shrinking government and applying free-market principles to what is left - are finding a more receptive audience than ever in the current fiscal crisis, even while they are denounced as extremist by labor groups and teachers.

And Romney, a Republican whose candidacy for governor was built on his private-sector expertise, appears more welcoming of Pioneer Institute ideas than any governor since the think tank was born, according to the institute's chief.

"We've been promoting the ideas of market competition and driving efficiency in government for years," said Stephen Adams, president and CEO of the Pioneer Institute. "Now you're facing a budget crisis of historic proportions, and people are much more receptive to ideas for restructuring government. The difference is, the Romney administration comes from the private sector, they know from personal experience how market forces can work, and they're determined to make it work."

The clearest connection between the Pioneer Institute and the Romney administration these days is Charles Chieppo, who until recently led the Pioneer Institute's Shamie Center for Restructuring Government.

In January, Romney tapped Chieppo to be his policy director at the Executive Office of Administration and Finance. He will be overseeing budget policy, which is central to Romney's vaunted restructuring of state government.

Former Pioneer executive director Charles Baker Jr. is a Romney adviser and chaired his transition advisory committee on health care. James Peyser, chairman of the state Board of Education and a Romney education aide, is a former executive director of the Pioneer Institute. Peter Nessen, Romney's chief education adviser, is on the institute's board of directors. Former District Court Judge Daniel B. Winslow, the governor's chief legal counsel, won the institute's Better Government competition for proposals to reform the judiciary, proposals Romney touted on the campaign trail and is hoping to legislate into reality.

With an operating budget of almost \$2 million a year, the institute is run on donations from individuals like Richard J. Egan, the former head of EMC Corp., and from foundations like the Fidelity Foundation and the State Street Foundation.

To be sure, other think tanks also have influence on the administration. And Baker, Nessen, Peyser, and some of Pioneer's ideas have had influential roles in previous Republican administrations as well.

The institute has been the most prominent champion of charter schools in the state for years, and Adams counts the rise of those schools in Massachusetts as one of Pioneer's greatest achievements.

But their ideas may have found their most fertile ground to date in the Romney administration.

Pioneer was vehemently opposed to bilingual education, a position shared by Romney on the campaign trail, and bilingual edu-

cation was defeated in favor of English immersion in November. Baker has proposed a complete restructuring of Health and Human Services, a goal that Romney is determined to meet with legislation to be filed May 1. Romney's first budget seeks to undo the Pacheco Law, which makes it difficult to privatize state services, a policy the think tank has harshly criticized for years.

'Now you're

crisis . . . and

people are

much more

facing a budget

And when Rom-

ney held a press conference last month to tout that budget, Pioneer's Adams was standing right beside him, delivering one of two speeches lauding Romney's proposals. Adams said he is receptive to optimistic that Pioideas for neer will have its greatest influence yet restructuring with Romney. "Past administra-

government.' tions kind of conceptually got it, but they were too close to the political process and

the horse-trading, and they let the hard changes that would be required go by the boards," Adams said. That promise of stronger influ-

ence worries some, who see Pioneer's policy positions as overly conservative and antilabor.

"It frightens me that the new governor is going to give credence to their prognostications," said Robert J. Haynes, president of the Massachusetts AFL-CIO. "They already have plenty of ties to the Pioneer Institute, a number of people in the administration, and they have been advising him. You're going to see more of the same. The insensitivity toward people in need is going to increase.

Senator Marc R. Pacheco for years has been locked in battle with the Pioneer Institute, which has issued reports calling the law named for him an expensive obstacle to competition. Pacheco, a Taunton Democrat, said he was concerned when Chieppo was appointed. His Pars proved wellfounded with Romney's first bud-

get, which effectively proposed the dismantling of the Pacheco law, which requires that the state demonstrate a significant cost savings before privatizing any public service.

IN

Anniversary

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"Do I think they've had some influence? Obviously," Pacheco said. "Do I think they'll have a great deal more influence in the future? Definitely."

> Opponents of charter schools have been exercised for months about the Pioneer Institute's influence on state poli-

They point to education board members Peyser, Baker, and Abigail Thernstrom, who is one of Pioneer's academic advisers, as proof that the institute exerts too heavy an influence on state education policy, tilting it in favor of charter

schools.

STEPHEN ADAMS

Pioneer Institute CEO

Pacheco, too, sees the think tank as having too heavy a hand in state education policy.

"They've funded the expansion of charter schools at a time when class size funding is cut, full-day kindergarten is gone," Pacheco said. "The expansion of charter schools is primarily a Pioneer Institute proposal. That has very little to do with common sense, and much more to do with ideology."

Chieppo said the Pioneer alumni in the Romney administration are pushing for the governor's goals now, not the think tank's, and that any overlap between the two is happy coincidence.

"It's not like there's some underground Pioneer cabal that meets on Thursday nights,' Chieppo said. "We're all up to our ears in what we're doing now. There is a basic common ground in how we view these issues, sure, but I'm not sure there's much more than that."

3

choices,

Economic Opportunity

Emerging Issues

## Expanding school choice in Massachusetts

Long a champion of improving K-12 public schooling in Massachusetts, **Pioneer Institute** shifted its focus on educational excellence significantly in 2003from nurturing charter schools to beginning an in-depth analysis of school vouchers as another way of bolstering reform.

A Pioneer op-ed in the Boston Herald makes the case for looking at school vouchers. Read the entire article at www.pioneerinstitute .org/opeds/vouchers.

As a staunch supporter of parental choice and competition as the best means to spur improvement of the traditional public school system, Pioneer was influential in bringing charter schools to Massachusetts and fostered their development through operation of a charter school resource center since the mid-1990s. There are now just over 50 charter

schools operating in the Commonwealth, serving approximately 16,000 students.

Effective July 1, 2003, the resource center became an independent organization—Building Excellent Schools. The move was a "natural evolution" for both Pioneer and the resource center; as a technical assistance/direct service

organization, the center was

## School crisis calls for creativity, choice

The announcement of the closing of the forming district schools. Monsignor Ryan Memorial High School was a blow to quality education for low-income families in Boston. Come June, when Mon-signor Ryan closes its doors for good, 90 ninth-, 10th- and 11th-graders will have to search for some other place to continue their schooling.

Our sympathy goes out to those children who at a very formative age will have to say

goodbye to familiar faces and Lovett C. PETERS surroundings **Stephen J. ADAMS** and start over at other schools. And they will be hard pressed to find an educational experience in Boston equal to one they are losing.

It will also make even worse the problems of Boston School Superintendent Thomas Payzant. He may have to accommodate in

the public school system many of those 90 Ryan High students. How good an education has Monsignor

Ryan been providing? Dropout rates in Catholic schools have been hovering around 2 ared to the 85 percent in Bos

available to inner-city parents for up to two-It may be time for the commonwealth to thirds of Boston's accept the principle that all familie

There are many questions around whether poor famil and how a voucher system would work in clude par Massachusetts. Should an all-girls school be The B eligible for a state voucher? Will private They have lic school schools accept the accountability requireing. Reco ments that would inevitably come with state play in pr dren in support? These and other questions need to President be worked out before poor families are given shut out a real choices about their children's education. young peop us not to b But it's time to start working out the details. any longer Massachusetts has too many poor children The ecor gest that th receiving inadequate education to simply wealth mig watch high-quality, low-cost schools serving from finding a largely low- and moderate-income populasupport priv that serve families. N tion close down. Ryan's stude

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A 'no excuses' look at education reform – A December Pioneer Forum kicked off the institute's expanded look at school choice in Massachusetts. Co-authors of the book No Excuses: Closing the Racial Gap in Learning—Abigail Thernstrom (center), a former member of Pioneer's board of academic advisors, and her husband Stephan (not pictured)—pointed to excellent charter schools as models for reform and suggested more voucher experiments.

Respondents **Brett Peiser** (left), founder of the South Boston Harbor Academy Charter School—one model cited by the Thernstroms—described the school's success while Michael Contompasis (right), chief operating officer of the Boston Public Schools, called for administrative reforms to compete with charters. Excerpts are available at www.pioneerinstitute.org/dialogues/ no excuses.

#### Educational Excellence

less and less involved in research, which is Pioneer's main mission. Building Excellent Schools has also expanded its services to aid charter schools in other states, while Pioneer focuses strictly on Massachusetts.

With this institutional change, Pioneer returns to its policy research "roots" in education reform, undertaking a comprehensive, multi-year examination of school choice in all its forms, with a particular focus on school vouchers.

"Around the country, a growing number of states have begun to address the problem of chronically underperforming schools with voucher programs. Even the federal government has launched a voucher experiment in the District of Columbia schools," notes Pioneer President/ CEO Stephen Adams. "It behooves us to consider whether vouchers can play a role in improving educational outcomes for Massachusetts children, especially those from families of modest means."

Building on its experience with charter schools. Pioneer will examine the complex questions surrounding the possible use of school vouchers as a means for improving the educational outcomes of children in Massachusetts. Specific issues to be addressed in this Voucher Research Initiative include the dynamics of parental choice, private school capacity, legal barriers, and accountability. Through this research effort, Pioneer will provide Massachusetts policy makers and opinion leaders with rigorous research on voucher programs begun in other states and an exhaustive analysis of the pros and cons of implementing a voucher program here.



Showcasing government reform ideas in each of Pioneer's E4 areas

#### EDUCATIONAL EXCELLENCE WINNER

"Collaboratives: Saving Tax Dollars for Massachusetts Schools" M. Craig Stanley, Ed.D., executive director, Greater Lawrence Educational Collaborative



Nearly every other state utilizes regional educational collaboratives to provide cost-effective support services to school districts, thereby freeing up district resources for student instruction. In Massachusetts, the use of collaboratives has been restricted primarily to the provision of special education. Expanding the role of collaboratives would make more effective use of increasingly limited education dollars.

www.pioneerinstitute.org/crg/competition/stanley.pdf

## Intradistrict school spending examined

The Educational Reform Act of 1993 has brought greater parity in spending across Massachusetts school districts. However, a 2003 Pioneer study that looks at *intra*-district perpupil spending finds "substantial" variation in spending among schools in the same district.

Looking at the state's seven largest school districts, the study found that schools with more special education students tended to spend more than other district schools. Non-Boston schools with large minority and/or low-income students also spent more than other district schools.



In contrast, Boston schools with higher percentages of minorities did not show higher spending, and those with large low-income populations actually spent substantially less per pupil. Federal and state grants for these populations generally played a compensatory role in the disparate spending, but were thus not providing extra funds for targetted students as intended. In non-Boston schools, the grants were more effective in increasing spending on at-risk students. The study is available online at www.pioneerinstitute.org/pdf/school finance.pdf.

Economic Opportunity

## **Promoting government restructuring efforts**

The arrival on Beacon Hill in January 2003 of a new reformminded administration offered promise for realization of much of Pioneer's "good government" agenda. Governor Mitt Romney proposed numerous ambitious government reforms that drew heavily on ideas the institute has advanced over the years: streamlining the bureaucracy, judicial reform, and competitive contracting of government services.

The results were mixed: the idea of smaller, more efficient government in Massachusetts received its most extensive public airing in a decade and won over many more supporters among citizens and opinion shapers. Pioneer's



Pioneer President/CEO Steve Adams (right) was one of two speakers invited by Governor Mitt Romney (left) to speak at the State House news conference at which the governor outlined his government restructuring proposals in early 2003.

research urging consolidation of state health and human service agencies resulted in adoption by the legislature of important first steps toward restructuring (below). On the other hand, other reforms remain on the "to do" list (next page).

### **Consolidating bureaucratic functions**

Pioneer's research urging a restructuring of the state's health and human services bureaucracy made significant headway in 2003.

In late 2002, Pioneer issued a *White Paper*, "Rationalizing Health and Human Services," that called for consolidation of common



tions across the sprawling 15-agency bureaucracy. The paper was authored by Pioneer board member Charles D. Baker, Jr., CEO of Harvard Pilgrim

administrative func-

Charles Baker, Jr.



Health Care and a former state secretary of health and human services (HHS).

"The timing was fortuitous," says Baker, citing the arrival of a new administration and development of a

broad consensus for reform. He credits the Romney administration for taking the "concept" of the Pioneer restructuring plan and framing it in such a way that it won legislative approval in 2003.

As a result, budgeting, information technology, and purchasing functions

will be consolidated across four HHS areas—elderly, health, disability, and children and family services—to reduce overhead and administrative complexity, says Baker.

Another bureaucratic consolidation proposed by Pioneer—merging the Mass Turnpike

Authority into the MassHighway department—is a key plank in Governor Romney's fiscal year 2005 budget

proposal now before the legislature.

AHEAD

### Order in the courts

The need for management reforms in the Massachusetts court system—brought to light in a 2002 Pioneer *White Paper* by a retired district court judge received significant endorsement and momentum in 2003.

A special task force created by Supreme Judicial Court Chief Justice Margaret Marshall in the wake of the Pioneer paper issued

its much-anticipated report in March. It substantiated the problems cited in the paper and echoed its call for dramatically revamping the judiciary's management structure.

The Visiting Committee on Management in the Courts, chaired by the Reverend Donald Monan, SJ, Chancellor of Boston College, and made up of a crosssection of civic leadership in the Commonwealth, detailed dysfunctional operations of the Massachusetts court system and called for professional management of the judiciary.

In October, a new Chief Justice for Administration and Management was named and pledged to bring about improvements in the judiciary's management structure using the Monan committee report as a "blueprint." Said Judge Robert Mulligan: "My main goal is...improving administrative structures and processes so my fellow court employees are able to deliver the same high quality justice more efficiently."

The Pioneer paper, authored by retired judge James Dolan, argued the legislature's control of the court systems purse strings has resulted in unnecessary staffing, patronage, inequitable allocation of resources among the courts, and inefficient operation of the judiciary. In particular, he cited the Boston Municipal Court (BMC) as a bloated, unnecessary stand-alone court.

As if to underscore the legislature's micromanagement that Dolan criticized,

the legislature rejected Governor Romney's call to eliminate the BMC and instead enlarged its jurisdiction, overriding the governor's veto to do so—and ignoring updated

Pioneer research on the BMC's "mismatched" caseload and staffing levels (see "The Case of the Boston Municipal Court: Budget and Staffing Not Justified by Caseload" on the web at **www.pioneerinstitute.org/pdf/ pdir13.pdf**). Notably, the governor's fiscal year 2005 budget proposal again calls for the BMC's elimination.

Meantime, Pioneer has stepped up its work with a growing coalition of civic groupsincluding Common Cause, League of Women Voters, Massachusetts Appleseed Foundation for Law and Justice, and New England Legal Foundation—to keep the issue alive. "This is far from dead," says Pioneer President/ CEO Steve Adams. "Gimmicks and patchwork solutions can only go so far. Our ideas for real reform remain 'in play' and ultimately represent the most sensible course for Massachusetts."

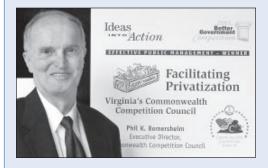


Showcasing government reform ideas in each of Pioneer's E4 areas

#### EFFECTIVE PUBLIC MANAGEMENT WINNER

"Facilitating Privatization: Virginia's Commonwealth Competition Council" Phil K. Bomersheim, Executive Director, Commonwealth Competition Council

Unlike Massachusetts, which intentionally protects public services from competition through the most stringent statute of any state, Virginia embraces competitive contracting of government services. This



paper reports on the success of Virginia's Commonwealth Competition Council, a state agency that provides a comprehensive system for identifying opportunities to privatize public service delivery. The Council provides a suite of decision-support tools to help government managers analyze and measure their operations to alternative business proposals.

> www.pioneerinstitute.org/crg/ competition/va.pdf

onomic **Opportunity** 

## **CUE: Spreading entrepreneurial expertise**



"Pioneer's Urban Business Alliance training has positioned our organization to climb another rung on the business advisory ladder. The knowledge we have been exposed to, the role plays, and consulting skills we have acquired make us competitive with any MBA graduate, even though the program does not carry the accreditation of a college."

> -Robert Thomas, Urban Business Alliance participant; executive director, Martin Luther King Jr. Business **Empowerment Center, Worcester, Massachusetts**

> > The Patriot Ledger

Pioneer Institute also is drawing up a to opening a small business in the during a checklist of all fed-

In a unique approach to boosting business growth in Massachusetts cities, Pioneer's Center for Urban Entrepreneurship (CUE) and State Street Corporation jointly launched a major initiative in 2003 to bring high quality business consulting services to low-income entrepreneurs. The collaborative effort, called the Urban Business Alliance (UBA), is aimed at helping low-income entrepreneurs by bolstering the skills of the community-based business advisors they Program to boost small businesses look to for assistance.

QUINCY

be able to more effectively address barriers to growth, discern between viable and undeveloped ventures, and serve as efficient and reliable referrals to capital markets. The program was piloted in the Worcester and Quincy areas during Fall 2003. Intensive weekly seminars were

and potential for low-income entrepreneurs. Advisors will

taught by instructors from local business schools-Brian Manning in Quincy

and Robert Parker in Worcester. In connection with the course, CUE prepared step-by-step guides for starting 20 different business types in the two cities.

Numerous local financial institutions provided financial support: Sovereign Bank; BayState Savings Bank; Webster Five (platinum supporters); Eastern Bank; Commonwealth National Bank; Middlesex Savings Bank (gold supporters); Abington

Savings Bank; Southbridge Savings Bank (silver supporters). Employees of some of the banks also gave guest lectures and served as mentors to provide follow-up technical assistance.

Long-term outcomes are being monitored, but based on the program's initial success State Street has continued

> funding for another year, when UBA will expand into Springfield and northeastern Massachusetts. And to better meet the needs of participants like Robert Thomas, professional and/or academic certification is also being explored.

"State Street is a strong supporter of programs that provide important social services to our communities.

**Ouincy among** 

cities chosen for

training sessions

This program is a fresh approach to addressing the needs of the urban small business community in Massachusetts in terms of job creation and a more robust local economy," says David A. Spina, State Street Chairman/CEO and a member of Pioneer's board of directors.

WORCESTER - A Bos think tank and a financial

The UBA enlisted the expertise of the Entrepreneurial Management Institute at Boston University to create a

specialized regimen of training in business consulting practices for community-based business assistance organizations such as community development corporations (CDCs). The training is designed to help CDC advisors better diagnose problems



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**URBAN BUSINESS ALLIANCE** 

is a collaboration with

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Other communities in the izations can advise en-

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Showcasing government reform ideas in each of Pioneer's E4 areas

#### ECONOMIC OPPORTUNITY WINNER

"The Pennsylvania Open for Business Interactive Registration Portal" Robert Bunty, IT Policy Consultant, Pennsylvania Governor's Office of Administration

Pennsylvania is leading the way in making use of the internet to facilitate small business development. The state has launched an interactive



Pictured is **Paul Roos**, director, Pennsylvania Open for Business.

www.pioneerinstitute.org/crg/competition/bunty.pdf

technology.

## Cutting red tape for small business

Pioneer's efforts to bolster low- and moderate-income entrepreneurship in the Commonwealth received a boost in 2003 when Governor Mitt Romney issued an executive order calling for a review of administrative rules and regulations to ensure they do not have an adverse impact on small businesses.

"With nearly half of the Massachusetts workforce employed by small businesses, we cannot have government creating regulatory mazes that hamper the growth of small businesses," said Romney.

The order also creates a new Small Business Advocate within the state Office of Small Business and Entrepreneurship to ensure that business owners can clear regulatory, permitting, and zoning issues at local and state levels.

"This will change a lot," Pioneer President/ CEO Steve Adams told the State House News Service. "It's a much more powerful approach to economic development" than a plan that invests money in particular business sectors.



**4th annual CUE conference** – Pioneer's Center for Urban Enterpreneurship's annual conference—which focused in 2003 on public and private sector support of low- and moderateincome entrepreneurs—attracted its largest turnout ever.

The keynote speaker was **George Gendron**, former editorin-chief of *Inc*. magazine and now entrepreneur-in-residence at Clark University (pictured at top right; hear audio excerpts of his remarks at **www.pioneerinstitute.org/gendron.cfm**).

The gathering offered participants opportunities to network.

Panelist **Gary Heidel** (on the left in the photo at left), director of small business/government program services for Citizens Financial Group, accepts a business card from entrepreneur **Asheesh Advani**.

Meantime, panelist **Katherine Kottaridis** (on the left in the lower right photo), the state's newly-named Small Business Advocate (see article above), greets **Diana Davis Spencer** of the Shelby Cullom Davis Foundation, which co-sponsored the October conference with Citizens Bank.







Economic Opportunity

## **Tackling housing and Medicaid challenges**

Given the magnitude of the state's housing crisis—evidenced by skyrocketing prices brought on by constrained supply— Pioneer is increasingly engaged in the issue. In 2003, the institute collaborated in a major report on the "supply-side" causes and is currently at work on a follow-up study.

The housing crisis in Greater Boston is due in large part to excessive state and local government regulatory policies and processes, according to a January 2003 report from Pioneer and the Rappaport Institute for Greater Boston at Harvard's Kennedy School of Government.

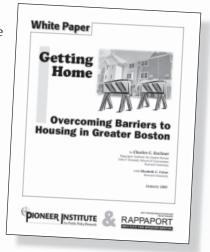
"From the beginning to the end of the process, developers' efforts to create new housing meet resistance whether at the stage of land acquisition and preparation or later in determining what and how to build," concludes the study's author, Charles

C. Euchner, executive director of the Rappaport Institute.

The report identifies numerous regulatory barriers—such as extensive state and local building and zoning codes, Massachusetts' expansive wetlands protection laws, and one of the toughest septic laws of any state—that hamper construction of new housing, which in turn has led to some of the highest housing prices in the nation.

The report—available online at **www.pioneerinstitute.org**/ **research/whitepapers/wp21cover.cfm**—recommends that the state







Showcasing government reform ideas in each of Pioneer's E4 areas

#### EMERGING ISSUES WINNER

"Re-engineering Medicaid" Harriett L. Stanley, Massachusetts State Representative

Expenditures for MassHealth (as Medicaid is known in Massachusetts) represent more than one-quarter of the state budget, and the program is financially unsustainable in its present form. Continuing to provide health coverage for our



neediest citizens will require the state to redesign MassHealth to operate more efficiently. The proposal would restructure MassHealth to resemble a subsidized insurance plan in which patients, private insurance plans, health care providers, and government participate as partners.

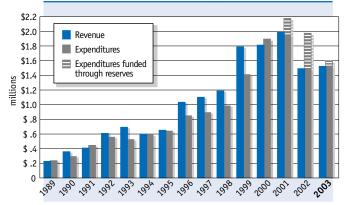
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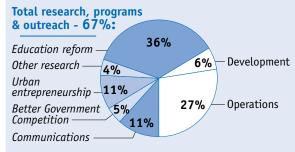
### Pioneer Institute Finances - 2003

Pioneer Institute is grateful to our many supporters who provide the bulk of the organization's financial resources through their generous donations (see the listing beginning on the next page). Pioneer posted overall revenue in 2003 of more than \$1.5 million, a slight increase from the previous year. The institute maintained tight control on expenditures, significantly reducing recent reliance on financial reserves. To ensure that donors receive the most value for their donations, the bulk of expenditures went toward programmatic, research, and outreach activities—the institute's main mission.

**Revenues/expenditures by year** (in millions of \$)



#### **Expenditures by activity**



These data are unaudited. Pioneer's financial records are audited annually by Glenn Ricciardelli, P.C. The fiscal year 2003 audited financial statement will be available upon request later this year.

Pioneer Institute neither seeks nor accepts government funding of any kind.



**Revenues by source** 

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Barbara Grossman (right) makes the acquaintance of former U.S. Senator Alan Simpson, keynote speaker at the BGC Awards Dinner.

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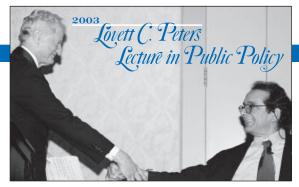
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John Reed (left) and John Davis (right) hosted a luncheon for civic leaders in Springfield that featured retired judge James Dolan (center), author of Pioneer's call for judicial administration reform. Dolan decried inequitable resources allocated to the Springfield District Court.



Supporters are invited to Pioneer's Lovett C. Peters Lecture in Public Policy. The 2003 speaker, pundit **Charles Kraut**hammer (left), was introduced by **William Edgerly**.

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Kelly Peters (left to right), Michael Ervolini, and David Evans at the Lovett C. Peters Lecture.