



PIONEER INSTITUTE  
PUBLIC POLICY RESEARCH

1988  
2008



**2007 Annual Report**  
*Celebrating 20 Years of  
Common Sense for the Commonwealth*



Center for  
School Reform



Shamie Center for  
Better Government



Center for  
Economic Opportunity

## Pioneer's Mission

Founded in 1988, Pioneer Institute is a non-partisan public policy think tank committed to keeping Massachusetts economically competitive and to strengthening the core values of an open society. To inspire market-driven policy reforms, Pioneer promotes individual freedom and responsibility and limited, accountable government. The Institute seeks to improve the intellectual climate in Massachusetts by commissioning timely and rigorous academic studies from leading scholars, and by injecting new ideas into the public debate through forums and lectures, publications, media campaigns, and outreach to legislators, business groups and the general public.

## Pioneer's Centers



### Center for School Reform

The Center for School Reform seeks to increase the educational options available to parents, drive system-wide reform, and ensure accountability in public education. The Center's work builds on Pioneer's legacy as a recognized leader in the charter public school movement, and as a champion of greater academic rigor in Massachusetts' elementary and secondary schools. Current initiatives promote *choice and competition, school-based management, and enhanced academic performance in public schools.*



### Shamie Center for Better Government

The Shamie Center for Better Government seeks limited, accountable government by promoting competitive delivery of public services, elimination of unnecessary regulation, and a focus on core government functions. Current initiatives promote *reform of the state transportation system, public employee benefit reform and sound fiscal management in state and local government.*



### Center for Economic Opportunity

The Center for Economic Opportunity seeks to keep the Commonwealth competitive by promoting a healthy business climate and reducing the cost of doing business in Massachusetts. Current initiatives promote *affordable housing, affordable, high-quality health care, transparent regulation and the revitalization of our urban areas.*

*Pioneer Institute is a tax-exempt 501(c)3 organization funded through the donations of individuals, foundations and businesses committed to the principles Pioneer espouses. To ensure its independence, Pioneer does not accept government grants.*

**Pioneer in 2007: By the Numbers**

**36 PUBLICATIONS**  
research papers, policy briefs, and event transcripts

**139 MEDIA HITS**  
articles, interviews, and editorials in newspapers,  
trade journals, TV and radio in Massachusetts  
and across the nation

**> 100 ATTENDEES**  
average per Pioneer event

**10 EVENTS**  
hosted by Pioneer

*All figures are for Pioneer's 2007 fiscal year:  
October 2006 through September 2007*



## Pioneer Founder Pete Peters Reflects on 20 Years

*In 1988, Lovett C. "Pete" Peters started the Pioneer Institute at the still very young age of 75. Twenty years later, he is still in the office three days a week. He remains, as he has always been, curious, committed, independent and forthright. Below are his reflections on 20 years as a leader of the Commonwealth's public discourse.*

**Why did you start Pioneer?**

I started Pioneer Institute to try and change the intellectual climate in Massachusetts. I remembered Anthony Fisher's story that, when he asked F.A. Hayek's advice about going into politics, that great political philosopher told him he would be wasting his time - there was no use trying to change Parliament until you first changed people's minds. Mulling that advice, I realized there would never be change on Beacon Hill unless the people of Massachusetts first accepted free markets as a viable alternative to big government. And that is what I started Pioneer to accomplish: to bring Massachusetts a voice for a strong free market, individual liberty and responsibility, and smaller government.

**What did you hope to accomplish?**

**Are you proud of what Pioneer has accomplished? What do you still hope it will accomplish?**

I am proud of what Pioneer has accomplished in 20 years, particularly of our work in education, and most particularly of our efforts to create charter schools in Massachusetts. I am also very proud of the Better Government Competition, which is our biggest export, having been adopted by organizations in eight other states, Canada, Argentina and Great Britain. Still, there's work left to do. Too many adults in Massachusetts still believe their interests are more important than the interests of our children. Until the teachers' unions and school bureaucrats understand that the children must come first, we will never have real education reform. That is my hope for Pioneer in the next 20 years: that it will find a way to give parents and their children a full range of choices in education. In fact, I fully believe that Pioneer should be able to accomplish that in the next 20 years.

**What advice would you offer to the next generation of committed citizens?**

Compromise where necessary, but remember always to set a standard to which the wise and honest may repair.



A handwritten signature in cursive script that reads "Lovett C. Peters".

Lovett C. Peters  
Founding Chairman

## To Our Supporters

This year marks Pioneer’s 20th year as an effective force in the encouragement of sound public policy. We have come a long way since 1988 in developing and implementing our mission to broaden opportunity and prosperity to all our citizens in Massachusetts.

Pioneer’s brand of independent, data-driven research and astute, focused advocacy builds on and brings out the best in Massachusetts—our brains, common sense and a singular focus on what works. Again in 2007 your investment in Pioneer paid handsome dividends for the Commonwealth.

Among other accomplishments, Pioneer worked with the administration to reform locally managed public pension systems, highlighted the need for Massachusetts to make a down payment on the \$13 billion owed in healthcare obligations to public employees, laid the groundwork for transportation reform, and, most importantly, through sophisticated media campaigns maintained the state’s momentum behind education reform.

Ensuring a bright future for Massachusetts will take continued innovation and vigilance. While Pioneer’s formula of high academic standards, accountability, school-based flexibility and parental choice have helped make Massachusetts’ K-12 schools the best in the nation, we cannot wait 20 more years to improve math and science teaching and transform our urban school systems. The cost and scope of government must be reasonable and sustainable. In 2008 and beyond, we will continue to address key liabilities, promote transportation reforms, and improve local and state fiscal management.

Massachusetts must also be more welcoming to entrepreneurs and working families. That means bringing smart market approaches to health care, housing, and business regulation. To ensure that prosperity is within the reach of all the Bay State’s citizens, Pioneer will continue to promote entrepreneurship, great schools and sound government in our Middle Cities.

The past year was exciting and productive. Stay tuned. There’s more—much more—to come.



William Tyler  
Chairman



Jim Stergios  
Executive Director

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## The Center for School Reform (CSR)

Pioneer has from the beginning been a leader of the school reform movement in Massachusetts. Considering the innovative approaches and measurable successes that characterize our public schools today, it is hard to believe that charter schools and accountability did not exist when Pioneer opened its doors twenty years ago. Before MCAS assessment became law, the evaluation of students, teachers, administrators and curricula depended solely on anecdote - not research. Massachusetts was clearly not achieving its educational potential.

But that all changed when Governor Weld, Senate President Tom Birmingham, and State Representative Mark Roosevelt struck a grand bargain. The 1993 Education Reform Act provided more state aid to local school districts in return for charter schools, high academic standards and accountability. This “Massachusetts Miracle” has produced first place finishes on all four National Assessments of Educational Progress in both 2005 and 2007.

As successful as education reform in Massachusetts has been, however, more needs to be done. An education gap still exists. At the same time we fight to safeguard the successful reforms already implemented, Pioneer continues to seek new ways to improve our public schools and provide school choice options for students and parents.



**Re-invigorate and re-inject the enthusiasm that heretofore had characterized our efforts to improve our public schools, and you will be performing a great public service. Pioneer, thank you very much for focusing on this issue.**

Thomas Birmingham  
Former Mass. Senate President

### Improving Our Public Schools

Over two decades Pioneer has consistently advocated instructional improvement, high academic standards, accountability and school-based management. Highlights include:

- The 1994 study *Special Education: Good Intentions Gone Awry*, which argued for adopting the “maximum feasible benefit” standard for public school students receiving special education services. Obviously, the Massachusetts legislature agreed, because it approved the report’s recommendation in 2000.



**1988**

Pioneer opens its doors for business. Among its first studies are analyses of Governor Dukakis’ universal health plan and the Commonwealth’s heavily regulated auto insurance industry.



**1991**

Pioneer hosts its first Better Government Competition to encourage citizens across the country with ideas to improve government. **BGC ideas have saved taxpayers over \$450 million.**

- The 1996 study *Bilingual Education in Massachusetts: The Emperor Has No Clothes*, which recommended an immersion approach for students with limited English proficiency. This time the voters agreed with Pioneer, for just such an approach was approved by public referendum in 2002.
- Two 2006 reports on *Education Reform in Massachusetts*, which demonstrated that many school districts, particularly larger urban districts, have failed to implement the state’s curriculum frameworks or use student data to improve student performance. Not surprisingly, the MCAS scores and dropout rates for those districts lag state averages.

**Pioneer has long been a relentless advocate on behalf of its public education agenda. Pioneer has helped to preserve the spirit of innovation that charter schools have brought to the education landscape. Pioneer’s accomplishments are many, and we look forward to continuing to collaborate with our long-time partner.**

Paul S. Grogan

President & CEO, The Boston Foundation

### Providing School Choice Options

Pioneer’s work on school choice spans options both within the existing public school system - pilot schools, METCO, vocational technical schools, interdistrict choice programs and other options, such as university partnerships - as well as options outside the current system - charter schools, tuition tax credits and school vouchers. Highlights include:

- Abigail Thernstrom’s 1991 book on *School Choice in Massachusetts*, which argued for expanded options for parents and students and explored the potential for vouchers and other tools to achieve that expansion.

## CSR Advisory Board

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Springfield*

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Foundation*

**1992**

Pioneer publishes *Reinventing the Schools*, which proposes a radical plan to grant schools the right to operate through individual charters.

**More than 60 charter public schools now operate in Massachusetts.**

**1994**

Pioneer publishes its first *Agenda for Leadership*, which every four years outlines for elected officials steps to keep Massachusetts competitive.





## The Center for School Reform (continued)

- Stephen Wilson's 1992 book on charter schools - *Reinventing the Schools: A Radical Plan for Boston*, which provided the blueprint for the 1993 Education Reform Act.
- The Charter School Resource Center, which Pioneer created in 1992 to identify and assist potential charter school leaders and introduce interested businesses and foundations to this innovative model for public education. By 1998, attendance in charter schools had grown to more than 10,000 and, that year, a Pioneer-commissioned survey found that charter parents were far more satisfied with their children's schools than parents of children in other public schools.

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### Pioneer makes an indispensable contribution to public policy in Massachusetts.

William Edgerly  
Former CEO, State Street Bank

- 
- The 1998 study on interdistrict choice in Massachusetts, *Competition in Education* by David Armor and Brett Peiser, which examined the program's impact on racial balances and budgets in both sending and receiving schools and the market response by districts to the competition the program created.
  - A School Choice Initiative, launched with donor support in 2004, and which to date has convened a series of studies, surveys and public forums to explore the current extent of school choice in Massachusetts, public reaction to school choice, and the capacity of private institutions to accept students from failing urban districts. The latest study, *School Choice Without Vouchers: Expanding Education Options Through Tax Benefits*, was published in 2007.

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**I have been a fan of Pioneer since it set up shop in 1988. It represents a worldview of freedom and individual endeavor that is sadly underrepresented in New England, and does so with intelligence and verve.**

Jeff Jacoby  
*The Boston Globe*

- 
- A series of fact sheets released in 2006 to substantiate the strong performance of charter schools and argue the legislative cap on charter schools in Massachusetts be lifted for the sake of the parents and children who live in underperforming school districts.

**1996**

*Bilingual Education in Massachusetts: The Emperor Has No Clothes* recommends a "structured immersion" approach to teaching English.

Approved by public referendum in 2002.

**1997**

Pioneer proposes changes to MBTA funding and administration, and Pioneer joins Blue Ribbon Commission on reform.

Forward funding and other reforms were implemented in 2000.

## The Lovett C. Peters Lecture in Public Policy

The Lovett C. Peters Lecture was established in 1998 to honor distinguished individuals who evince both intellectual stature and tangible accomplishment. Designed as a forum for a robust exchange of ideas and a thank you to Pioneer's donors, the series has been called "seriously cerebral and highly edifying" by the *Improper Bostonian*.



Angus McBeath,  
Edmonton, Canada school  
Superintendent and  
2005 Lovett C. Peters Lecturer.

- |             |  |             |  |
|-------------|--|-------------|--|
| <b>1998</b> | Arne Carlson,<br>Governor of Minnesota   | <b>2004</b> | Robert Herbold,<br>COO, Microsoft Corp.                                  |
| <b>1999</b> | Vaclav Klaus,<br>President, Czech Republic                                     | <b>2005</b> | Angus McBeath,<br>Superintendent,<br>Edmonton, Alberta<br>Public Schools |
| <b>2000</b> | Walter Williams, Author and<br>Economics Professor,<br>George Mason University | <b>2006</b> | Robert George,<br>Jurisprudence Professor,<br>Princeton University       |
| <b>2001</b> | Bob Kerrey, U.S. Senator   | <b>2007</b> | Peter Diamandis,<br>Founder, X Prize Foundation                          |
| <b>2003</b> | Charles Krauthammer,<br>Pulitzer Prize-winning<br>Columnist                    |             |  |

**Pioneer's work is exemplary.  
Mr. Peters' devotion to the public good is legendary.**

Robert George  
Princeton University

## Pioneer Institute Donors for 2007

The gifts listed reflect Pioneer's fiscal year 2007, which ran from October 1, 2006 to September 30, 2007.

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**1998**

Pioneer hosts its first Lovett C. Peters Lecture in Public Policy, delivered by Minnesota Governor Arne Carlson.

**2001**

Pioneer's Center for Economic Opportunity hosts its first annual conference, bringing entrepreneurs, lenders and policy makers together to discuss obstacles to economic development.



## The Shamie Center for Better Government

Since 1988, Pioneer has worked hard so that Massachusetts state government works well. We've poked holes in empty promises and outlined ways to reduce government's cost. We've addressed the Commonwealth's looming liabilities; promoted limited, effective government; and challenged corporate welfare and state capitalism. Our ideas have saved Massachusetts' taxpayers more than \$450 million.

### Addressing Liabilities

Massachusetts faces enormous liabilities: a \$17 billion maintenance gap to repair state assets; pension and healthcare obligations owed current state employees and retirees amounting to \$27 billion.

#### *Pension and Healthcare Liabilities*

In 2006 Pioneer released a series on public employee benefits that identified state liabilities of more than \$14 and \$13 billion respectively for pension and health care obligations to state employees. A number of the recommendations outlined in the series were adopted by the major party gubernatorial candidates. Ultimately they were featured by Governor Patrick as part of his Municipal Partnership Act.

#### *Transportation Liabilities*

The MBTA carries \$8 billion in debt, the service obligations on which eat up every dollar the T collects from fares. That's right: every dollar the T collects goes to paying debt; unless the state steps in to help out there is nothing left in the budget for operating and maintenance costs.

Still, as recently as a decade ago the MBTA was given an annual blank check by the legislature; its management's focus was on building new lines and new stations; and its system for collecting fares was inefficient. Pioneer worked as part of the Blue Ribbon Commission on reform to change all that. Among the commission's recommendations were forward funding that forced the MBTA to start living within its means, a focus on maintenance, and automated fare collection. These were important, first steps.

The Longfellow Bridge turned 100 last year. Unfortunately, it looks its age. In *Our Legacy of Neglect* Pioneer highlighted the risks we take as a state by deferring our maintenance needs. We followed with a series of recommendations to make transportation maintenance a priority and the media coverage surrounding our research resulted in the adoption



The Longfellow Bridge

**2002**

*A Declaration of Independence: Reaffirming the Authority of the Third Branch* proposes reorganization of the court system.

**Monan Commission incorporates Pioneer ideas into its judicial reform proposal.**

**2003**

*Rationalizing Health and Human Services* makes the case for reform of many state social service agencies.

**Reorganization was implemented in 2004, saving taxpayers \$90 million.**

of a number of Pioneer's recommendations at a joint press conference attended by Governor Patrick, House Speaker DiMasi and Senate President Murray.

### Effective, Limited Government

Pioneer was founded on a belief that government should be efficient and effective. That belief has always pushed Pioneer to explore where the private market can provide better, cheaper service than the state's bureaucracy. You might be surprised; Pioneer has explored delivering everything from subsidized housing to the management of public ice rinks through private providers. In fact, Pioneer's 2006 study of public rinks in Massachusetts demonstrated that rinks operated by private contractors were open longer hours, used by more people and no more expensive to use than rinks still run by the state.

**Pioneer is so important to every single citizen in Massachusetts. I applaud you because of the type of government you promote: cost-effective, innovative and results-oriented.**

Susan Tucker,  
State Senator



Perhaps Pioneer's most intriguing study was Herman Leonard's 1992 report, *By Choice or By Chance: Tracking the Values in Massachusetts' Public Spending*. By ignoring the rhetoric that usually surrounds budget debates, Leonard focused on actual spending levels. The result was a direct challenge to conventional wisdom, most strikingly the revelation that actual state spending per public school pupil, which had been the highest in the nation in 1979, had declined through the 80s. The report outlined the need for the 1993 Education Reform Act.

Over the past two decades, Pioneer has also challenged the state's anti-privatization, or Pacheco, law. A series of studies published by Pioneer has clearly demonstrated the enormous costs the law adds to public construction projects in the state. The Pacheco Law also prevents the state and its agencies from implementing competitive bidding, which is just plain common business sense. Other Pioneer studies have included *Is Welfare Working? The Massachusetts Reform Three Years Later*, *The Government*

## Shamie Center Advisory Board

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**2003**

Pioneer publishes its first guide to *Navigating through Regulations and Licensing Requirements* for urban entrepreneurs.

To date, Pioneer has published navigating guides for 11 Massachusetts cities.

**2004**

In conjunction with Harvard's Rappaport Institute, Pioneer compiles and analyzes database of housing regulations in 187 towns and cities.

Pioneer was the only research group on Gov. Patrick's 2007 Housing Task Force.



## The Shamie Center for Better Government (continued)

*Effectiveness Index: A Cross-State Survey* and *A Declaration of Independence: Reaffirming the Autonomy of the Third Branch*, which focused on waste, patronage and mismanagement in our court system. The report found that 416 recent hires, to the taxpayer tune of \$50 million, had never been requested by the courts.

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**Pioneer's 20-year commitment to free-market studies has changed Massachusetts' public policy debate. Pioneer is providing a great service to state policymakers by providing scholarly and balanced fiscal policy research.**

Tracy Sharp  
State Policy Network

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### Challenging Corporate Welfare and State Capitalism

"The Failure of State Capitalism", an essay in Pioneer's very first *Agenda for Leadership*, published during the 1994 election season, challenged the economic justification for a Megaplex in South Boston. The next year, Pioneer teamed with Boston's Federal Bank to cast a critical eye on the claims made by the Megaplex's boosters. The result was its legislative defeat.

But killing Frankenstein is never easy and the Megaplex soon reappeared in a new guise, the Boston Convention and Exhibition Center. Despite Pioneer studies that questioned the attendance projections made by the convention center's supporters, it was built. We can only console ourselves that, seven years later, the center has failed to meet projections, precisely as Pioneer predicted.

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**I've seen the growth and exciting work of Pioneer. Its mission is to change the intellectual climate in Massachusetts...but Pioneer's impact has been far broader, most notably with the Better Government Competition and the charter school movement.**

Ken Weinstein  
Hudson Institute

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Most recently, Pioneer opposed plans to use hundreds of millions of dollars in tax credits to entice biotechnology companies to locate and expand in Massachusetts. Transferring funds from one economic sector to another based on the administration's discretion is patently unfair to other industries. The government does not have the ability to invest in the private sector with success. Worse, doling out tax breaks to the industries with the best-connected lobbyists may lead to corruption.

**2006**

*Leaving Money on the Table: The 106 Pension Funds of Massachusetts* finds \$1.6 billion in lost returns over ten years, and recommends investment through the state.

**Recommendation was adopted by Governor Patrick and legislators in 2007.**

**2006**

*The Elephant in the Room: Unfunded Public Employee Healthcare Benefits* recommends tying benefits to an irrevocable fund.

**Recommendation was adopted by Governor Patrick and legislators in 2007.**

## The Better Government Competition: “Our Greatest Export”

The Better Government Competition **inspires ordinary citizens to play a larger role in their government.** Pioneer does not have all the answers when it comes to state government and we know that the so-called insiders don’t have all the answers either.

- Held annually since 1991, the **BGC has been emulated in eight other states and as far away as Argentina.**
- The ideas the BGC has generated that have been put into action by the state have **saved the Commonwealth more than \$450 million.**
- **Four proposals recognized at the first BGC** – ideas to improve vehicle fleet maintenance, to reorganize the MBTA, and to privatize child support payment collection and state-owned pharmacies – **were all subsequently implemented in state legislation.**
- **Recent winners** have included proposals to expand the use of education collaboratives for delivering support services to Massachusetts’ school districts and to reform the state’s civil service system.



Gov. Mitt Romney



Gov. Deval Patrick

- Last year, BGC **recognized the unified permitting process** that the Devens Commission used **to make the former military base a destination for new and relocating businesses.**
- To help share BGC ideas, Pioneer recently formed the **Roe Better Government Network** with support from the Roe Foundation so that the **ideas helping to change Massachusetts** for the better will be **available to policy makers across New England.**

**2006**

Pioneer hosts its first Colby Hewitt Health Care Lecture with former American Medical Association president Daniel “Stormy” Johnson.

**2006**

*Measuring Up: The Cost of Doing Business in Massachusetts* demonstrates how structural costs put Massachusetts at a disadvantage. **Industry and government leaders refer to the report for clear regulation and cost solutions.**



## The Center for Economic Opportunity (CEO)

Some regulation is necessary to ensure a level playing field. But regulations need to be transparent and predictable. Pioneer works to improve the Commonwealth's business climate and takes seriously the opportunities and obstacles to making our urban centers engines of economic activity. Pioneer's Center for Economic Opportunity (CEO) explores ways to reduce the cost of health care, ensure housing supply can meet demand without sacrificing environmental goals, and increase opportunities for new businesses and jobs.



**There are very few organizations that have done more to maintain Massachusetts' quality of life, competitive position and innovative zeal in the public sector than Pioneer.**

Charles Baker, Jr.  
CEO, Harvard Pilgrim Health Care

### Improving the Business Climate

Massachusetts, particularly Greater Boston, is an expensive place to live. It's also an expensive place to do business. Pioneer quantified this figure in a 2006 study by Global Insight, an economic research firm. *Measuring Up? The Cost of Doing Business in Massachusetts* examined eleven cost factors in nine industries across seven states. The study demonstrated that Massachusetts' land, housing, energy and unemployment insurance costs are eroding our ability to compete with rival states. Addressing one issue highlighted by Global Insight's research, Pioneer released *Unemployment Insurance in Massachusetts: Burdening Businesses and Hurting Job Creation*. The brief recommended reducing the cross-subsidies steady employers pay to seasonal ones who abuse the system as a wage supplement.

### Housing and the Environment

Pioneer's 2001 report, *Build More or Manage Better? Subsidized Housing in Massachusetts*, recommended the creation of a statewide waiting list and performance measures that would make subsidized housing a temporary hand up rather than a permanent handout. Pioneer then turned to how regulation impacts the broader residential housing

*(Continued on page 16)*

## Colby Hewitt Endowment

Gifts designated for the Colby Hewitt Endowment include only those donated for the purpose of endowing a Healthcare Research and Lecture Program.

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## Health Care

One of Pioneer's first studies uncovered the inefficiency and high costs that would result from the Dukakis administration's health care plan, but only with the publication of *Public Profits for Private Contracts: A Case Study in Human Services* by Robert Melia did Pioneer begin addressing the issue of health care in a strategic and sustained way.

- 1999** Pioneer commissioned **Jack Needleman** to explore the **lack of for-profit hospitals** in the Commonwealth.
- 2000** Pioneer released *An Economic History of Health Care in Massachusetts: 1990-2000* by the late **Dr. Jerome Grossman**.
- 2002** Pioneer explored the need for greater organization in the **Executive Office of Health and Human Services**. Harvard Pilgrim CEO (and former Pioneer Executive Director) Charles Baker, Jr., detailed an "integrated, coordinated approach to client services," which was **adopted in 2003 and reduced operating costs by \$90 million without reducing services**.
- 2004** A study led by **Nancy Kane** highlighted strong performance among community hospitals on cost and quality outcome data and called for greater focus on providing transparent data to the public, which, **in 2006, became a key cost containment strategy embedded in the state's Health Care Reform Act**.
- 2007** At the 2nd annual Colby Hewitt Lecture, **Professor Regina Herzlinger** asked, *Who Killed Health Care?* and outlined a consumer driven system to contain costs and increase the quality of care.



Our beloved, bow-tied chairman,  
Colby Hewitt

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Delia Vetter  
EMC Corporation

In memory of  
**Tom Pyle**

Pioneer Director  
national health care expert  
Dear friend, you will be missed.





## The Center for Economic Opportunity (continued)

market. Charles Euchner's 2002 report, *Going Home*, highlighted regulations and their impact on how much housing gets built and how much land is used in the process.

Building on Charles Euchner's study, Pioneer worked with the Rappaport Institute at Harvard University to build a database of local housing regulations in 187 cities and towns in Massachusetts. Analysis showed that stifling regulation at the local level makes construction of all but the largest homes, lots and streets practically illegal. Also, preventing development of smaller, more affordable homes in denser concentrations leads to fewer housing starts and greater sprawl.

### Urban Revitalization and Entrepreneurship



In 1998's *Agenda for Leadership*, Howard Husock described how red tape stifles new business creation in Massachusetts, specifically small and low-income businesses. He explained how small-scale entrepreneurship is an essential complement to welfare and job training.

1999's *Economic Opportunity in Boston: An Index of the Regulatory Climate for Small Entrepreneurs* demonstrated that "Boston has erected strict and expensive barriers to market entry" for small businesses. To help low-income entrepreneurs, Pioneer has published 11 guides to *Navigating through Regulations and Licensing Requirements*, two for the City of Boston, one in English and one in Spanish.

Pioneer and State Street Bank took lessons from this research and established a training and mentoring program for community-based advisors to small businesses. In its two years, the Urban Business Alliance incorporated local banks and community development organizations in Worcester, Fall River, Holyoke, New Bedford and Springfield.

Finally, Pioneer last year released *Rehabbing Urban Redevelopment: Building the Next Urban Economy* to outline ways to make state government responsive to cities outside of Greater Boston. Pioneer then launched its Middle Cities Initiative, which includes the Middle City Mayors Coalition and a multi-year effort to benchmark municipal performance in education, public safety, fiscal management and economic development. The goals are government transparency and the identification of policies that work to improve the delivery of municipal services to residents and businesses.

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### 2007

At the 7th Annual CEO Conference, Pioneer releases *Rehabbing Urban Redevelopment: Building the Next Urban Economy*, which outlines how to make government work for cities outside Greater Boston.

**Pioneer begins Middle Cities Initiative to revive our vital urban centers.**

### 2007

Pioneer publishes *Our Legacy of Neglect: The Longfellow Bridge and the Cost of Deferred Maintenance*, which identifies a \$17 billion maintenance gap for State assets.

**Governor Patrick adopts a number of the reforms outlined in a subsequent report.**

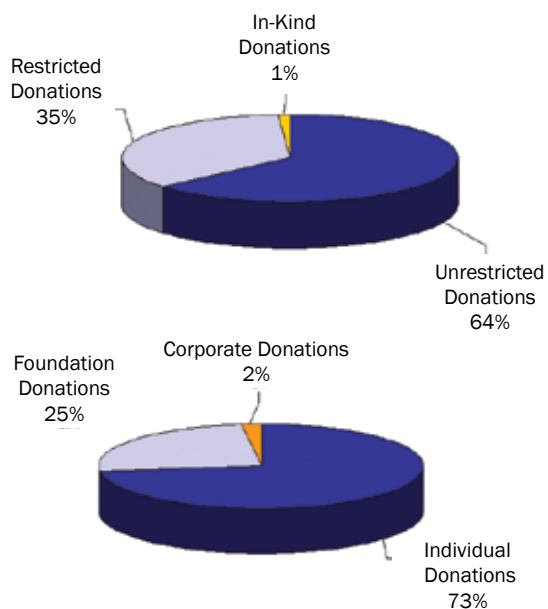
## Profit & Loss

Income	
Unrestricted Donations	\$768,269
In-Kind Donations	15,000
Restricted Donations	422,331
Other Revenue	25,229
<b>Total Income</b>	<b>\$1,230,829</b>
Expenses	
Employment Costs	\$633,821
Outside Services	146,897
Research	84,630
Printing & Publishing	94,387
Distribution Costs	14,580
Events and Meetings	129,825
Staff Business Expenses	12,582
Office Operations	132,582
Internet/Website	7,468
<b>Total Expenses</b>	<b>\$1,256,772</b>
Other Income	
Total Other Income	\$99,518
Total Other Expenses	39,119
<b>Net Income</b>	<b>\$34,456</b>

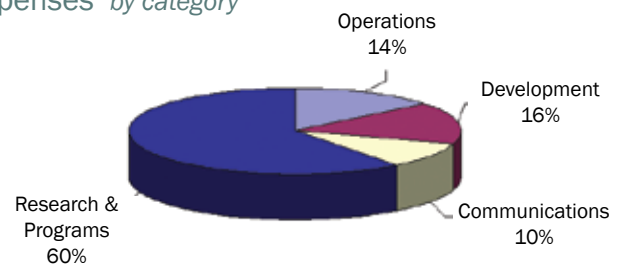
## Balance Sheet

Assets	
Current Assets	
Cash	\$836,599
Accounts Receivable	52,833
Investment Funds	489,605
Fixed Assets	7,675
Other Assets	32,375
<b>Total Assets</b>	<b>\$1,419,087</b>
Liabilities and Equity	
Liabilities	
Accounts Payable	\$30,481
Other Accrued Liabilities	5,000
Deferred Rent Expense	7,959
<b>Total Liabilities</b>	<b>\$32,375</b>
Equity	
Unrestricted Funds	\$1,112,602
Temporarily Restricted Funds	61,166
Permanently Restricted Funds	167,422
Net Income	34,457
<b>Total Equity</b>	<b>\$1,375,647</b>
<b>Total Liabilities and Equity</b>	<b>\$1,419,087</b>

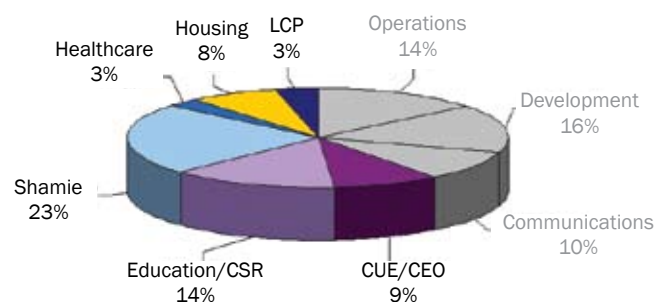
## Revenues



## Expenses by category



## Expenses research programs' shares of total expenditures



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The gifts listed reflect Pioneer's fiscal year 2007, which ran from October 1, 2006 to September 30, 2007.

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