

LEADING IDEAS

PRACTICAL ACTION



PIONEER INSTITUTE
2009 ANNUAL REPORT



School
Reform



Better
Government



Economic
Opportunity



Health
Care



Middle
Cities

Our 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.

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Center for School Reform

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.



Center for Better Government

The Center promotes limited, accountable government, competitive delivery of public services, elimination of unnecessary regulation, and a focus on core government functions.



Center for Economic Opportunity

The Center works to keep the Commonwealth competitive by promoting a healthy business climate and reducing the cost of doing business in Massachusetts.



Health Care Initiative

The Initiative focuses on providing an empirical perspective of the Commonwealth's landmark 2006 Health Care Reform legislation. By researching practical cost containment measures and tactics, the Initiative can address the Commonwealth's growing employee benefit liabilities.



Middle Cities Initiative

The Initiative promotes the use of performance management metrics as a tool to help the municipal governments of Massachusetts' former industrial hubs improve the delivery of core services, while providing city leaders with a forum to learn from their respective strengths.

Pioneer by the Numbers: 2009

18 PUBLICATIONS
research papers, policy briefs, and event transcripts

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

115+ ATTENDEES
average per Pioneer event

22 EVENTS
featuring Pioneer

*All figures reflect Pioneer's 2009 fiscal year:
October 1, 2008 through September 30, 2009*



Leading Ideas, Practical Action

The world has changed. With its stagnant employment base, once unimaginable liabilities, and an out-of-touch political class, some argue that Massachusetts has seen its best days.

We disagree. This period of uncertainty is precisely the time to renew the Bay State's strengths and mount a strong challenge to its points of failure. After this year's heartening success in lifting the charter school cap, many of you have asked about our ongoing goals.

Our long-term goals remain unchanged: The best schools in the world, effective but frugal government, and a dynamic private sector that draws investors from around the world and offers opportunity to the newest citizens of Massachusetts.

In the near-term, we aim to accomplish the following:

- Attract the best charter school operators to the Bay State and build upon the core elements of our successful education reform
- Bring about business practices and transparency to state and local governments
- Center political campaigns on jobs and the economy, moving that debate from the government picking winners and losers toward a predictable, level playing field
- "Reform" the state's health care reform, so that it is more affordable, effective and focused on small business needs

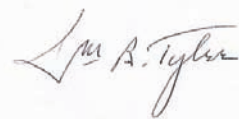
Our voice for change is strong and respected because of the quality of our strategies and research, and our commitment to the well being of our home state. What we call our successes are also your wins, and we are grateful for the opportunity to do this work. Pioneer does so much on the same "lean" principles that it advances in the public sphere—outsourcing, transparency, performance measurement and goal-based activity.

We are pleased that our list of friends is growing. In the past three years, we have increased the number of our supporters by 60 percent. Importantly, the number of Pioneer "Members," who annually sustain our work at the \$1,000 level and higher, has, over the same period, grown from 130 to almost 170.

Help us build the future and make our state a better place to live and succeed.

A handwritten signature in black ink, appearing to read "James Stergios".

James Stergios
Executive Director

A handwritten signature in black ink, appearing to read "William B. Tyler".

William B. Tyler
Chairman



Center for School Reform

2009 marked the 16th anniversary of the landmark Massachusetts Education Reform Act (MERA). The Bay State is now the nation's undisputed leader in K-12 education and among the world's best in mathematics and science.

Pioneer's work builds upon the MERA provisions that have led to historic gains for Massachusetts students: equitable school funding, high academic standards, parental choice, and accountability for students, teachers, and school leaders. Our goal is to highlight successes and point ways to the next level of achievement.

A Hard-Won "Massachusetts Miracle"

In 1988, Massachusetts was far from a national education leader. Our public education system was middle-of-the-road at best, with verbal and Math SAT scores below the national average.

In op-eds, radio and media appearances, public testimony, and outreach to legislative, business and school leaders, Pioneer has consistently underscored the Massachusetts success story in K-12 school reform:

- Massachusetts' charter school students outperform district school students on the MCAS. In 2009, 3 of the top 10 schools in 10th grade math and 4 of the top 10 schools in 10th grade English language arts (ELA), were charters. Many charters, which serve largely low-income and minority student populations, rank among the nation's finest.
- Our state funding formula is the most equitable in the nation.
- In 2005, Massachusetts became the first state ever to finish first in all four categories measured by the "Nation's Report Card" (NAEP) and again swept every category in 2007 and 2009. In 2008, Trends in International Mathematics and Science Study testing demonstrated that Massachusetts' students are globally competitive, tying for first in the world in eighth-grade science.
- Between 2002 and 2009, NAEP scores for African-Americans and Hispanics on both fourth and eighth grade ELA testing improved more rapidly than those of white students.
- National experts, including the American Federation of Teachers, Achieve, Inc. and the Fordham Foundation, regard Massachusetts' academic standards and assessments as the finest in the nation.

Massachusetts has made a serious investment in education, with state and local per-pupil spending now at \$13,000, up from \$5,400 in 1993, and state support for K-12 education tripling to \$4.5 billion annually. Unfortunately, as our Spring 2009 piece in *Education Next* made clear, the Patrick administration has tried to march the Commonwealth back to the pre-reform days of 1992.

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High Academic Standards and Assessments: A national model for student achievement



While garnering praise from noted curricular expert E.D. Hirsch, Jr. (left), Massachusetts' liberal arts and academic content-rich standards have been the focus of administration attempts to introduce additional "how-to" skills. In Spring 2008, the governor created the 21st Century Skills Task Force, which sought to move Massachusetts away from clearly articulated goals and objective assessments focused on academic excellence.

Through two reports, *Strengthening Standards-Based Education* and *A Step Backwards*, and media outreach, Pioneer fought these proposals. Working with members of the CSR advisory board, national standards experts associated with Common Core, the Fordham Institute, and the Core Knowledge Foundation, Pioneer led a national campaign for academic rather than "how-to" skills standards.

In December 2008, Pioneer co-sponsored, with Harvard University's Program on Education Policy and Governance (PEPG) and MassINC, *Core Academic Knowledge: Educating for Common Purposes*, an event featuring Dr. Hirsch and Tom Birmingham, former State Senate President and chief architect of the 1993 MERA, and a panel of experts to discuss K-12 academic standards and assessment, the liberal arts, and softer "21st-century" skills."

Confronting Barriers to Choice

"The Irish are perhaps the only people in our history with the distinction of having a political party, the Know-Nothings, formed against them," wrote John F. Kennedy in *A Nation of Immigrants*. Our Massachusetts Constitution is still marred by two "Anti-Aid" amendments that enforce mid-19th century bigotry by prohibiting the use of state and local tax revenues to fund parochial schools.

Repeal of these prejudiced amendments would allow state school funding to follow the student, as it does in higher education across America. Building on numerous reports, Pioneer believes that parents of the 100,000 Massachusetts children in chronically failing schools should be given the choice of publicly funded scholarships to private, parochial or other schools.

Working with national leaders, the Becket Fund for Religious Freedom, the Black Alliance for Educational Options, Harvard University's PEPG, and an ecumenical group of Catholic and Jewish Day School Officials, Pioneer co-sponsored *The Know-Nothing Amendments: Barriers to School Choice*, an event featuring Kevin Chavous (right), founder of Democrats for Education Reform and former D.C. City Councilor. The event launched a school choice working group in Massachusetts that is currently exploring tax credits, scholarships, and other legal remedies to increase parental choice.



Massachusetts Vocational-Technical Schools: The Success Story

The Commonwealth's vocational-technical high schools have demonstrated remarkable success over the past decade. MCAS scores for the 26 voc-techs have jumped 40 percent since 2001 and 6 of the 10 most improved high schools on the 2008 MCAS were vocational schools. Statewide, vocational schools' graduation and MCAS pass rates top state averages; dropout rates are less than half of those in other public high schools.

Pioneer released *Vocational-Technical Education in Massachusetts* at an event featuring State Treasurer Tim Cahill. The event, which aimed to understand and celebrate vocational school successes, received wide media coverage and won a statewide award from the Massachusetts Association of Vocational Administrators.

With almost one-quarter of their students statewide having special needs (statewide average is 17 percent), voc-tech schools' success is especially remarkable. More than 80 percent of voc-techs' special education students graduate, compared to about 63 percent at other public schools.

Voc-tech schools' recipe of autonomy, parental choice, close relationships with employers and the integration of academic and vocational education holds important lessons for Massachusetts.

27,000 more children in charter schools

Pioneer has built on its reputation as a leading advocate for charter public schools, intensifying its push to lift the charter school caps after Governor Patrick's March 2009 proposal to allow only several thousand new students into charters while applying new restrictions and reducing funding. We also questioned the injection of politics into the approval of proposed charters in Brockton and Gloucester, given that the process' objectivity has made sure Massachusetts' charters are of the highest quality.

With the debate heating up about lifting charter school caps to qualify for federal Race to the Top funding, Pioneer released three pieces of key research: *Follow the Money* – on charter school and district school funding; *Putting Children First* – lessons learned from the Massachusetts charter model; and the *Debunking the Myths about Charter Public Schools* series. These papers, together with events, op-eds, work with editorial boards, and a statewide push on radio and TV, contributed to a debate that led to the passage of "An Act Relative to the Achievement Gap" in January 2010, which provided 27,000 largely poor and minority students the chance to attend charters.

The Lovett C. Peters Lecture in Public Policy

In November 2009, we celebrated the 11th annual Lovett C. Peters Lecture in Public Policy, which honors distinguished individuals evincing intellectual stature and tangible accomplishment. Our keynote speaker was Cory Booker, Mayor of Newark (NJ), who spoke about expanding educational opportunity in our cities through school choice. The evening began with remarks from Thomas Birmingham, former Senate President and chief architect of the landmark 1993 Massachusetts Education Reform Act.



"Every generation of Americans has made a way out of no way... [I]t is no longer 'Can we do it?' It is an issue of 'Do we have the collective will?' We have a nation where too many people think democracy is a spectator sport." – Mayor Cory Booker

"Pioneer has assumed the leading role in Massachusetts in protecting what works in education reform and advocating for the policies that will bring us to the next level."

– Thomas Birmingham





Center for Better Government

In 2009, the Center for Better Government advanced Pioneer's commitment to limited and effective government and market-based public policy approaches, through a combination of leading edge research and hands-on engagement with political leaders. Our main focuses were state and local budgets and the reforms to ensure improvement in our transportation system.



Managing in a Time of Crisis: State and Local

In the worst fiscal climate in years, Pioneer provided real-time guidance to budget makers with three policy briefs – *Hard Decisions, Needed Leadership; Start Here Before Cutting the Safety Net*; and *Countdown to Fiscal Sanity* – that offered hundreds of millions of dollars in savings. Many of the proposed reforms found their way into the state budget while several others are under consideration for 2010.

The fiscal crisis deeply impacted municipal budgets. Pioneer took an active role in providing solutions through a focus on regionalization and our Middle Cities Initiative. Our White Paper on regional cooperation – *Regionalization: Case Studies of Success and Failure in Massachusetts* – was widely cited and provided evidence of both the potential and the pitfalls of this money-saving option. Pioneer presented at forums across the state, including the Massachusetts Municipal Association's annual meeting. To advance reform, Pioneer also launched an online catalogue of successful regionalization agreements (see "Spotlight on Transparency" page).

Hard Reforms

To lessen the brunt of the fiscal hit to localities and to maintain high quality core services, Pioneer led a sustained media campaign around 10 common sense reforms that would save the state well over half a billion dollars annually. Our analysis of state employee salaries and headcount shows that they have increased unreasonably, the latter rising, for example, by almost 10 percent from 2004 to 2008. The message is starting to get through: the Administration is now trumpeting a reduction in headcount of over 2,000 positions; though the Administration has unnecessarily cut deeply into safety net positions. Pioneer will continue to monitor this issue and whether or not savings have been realized.

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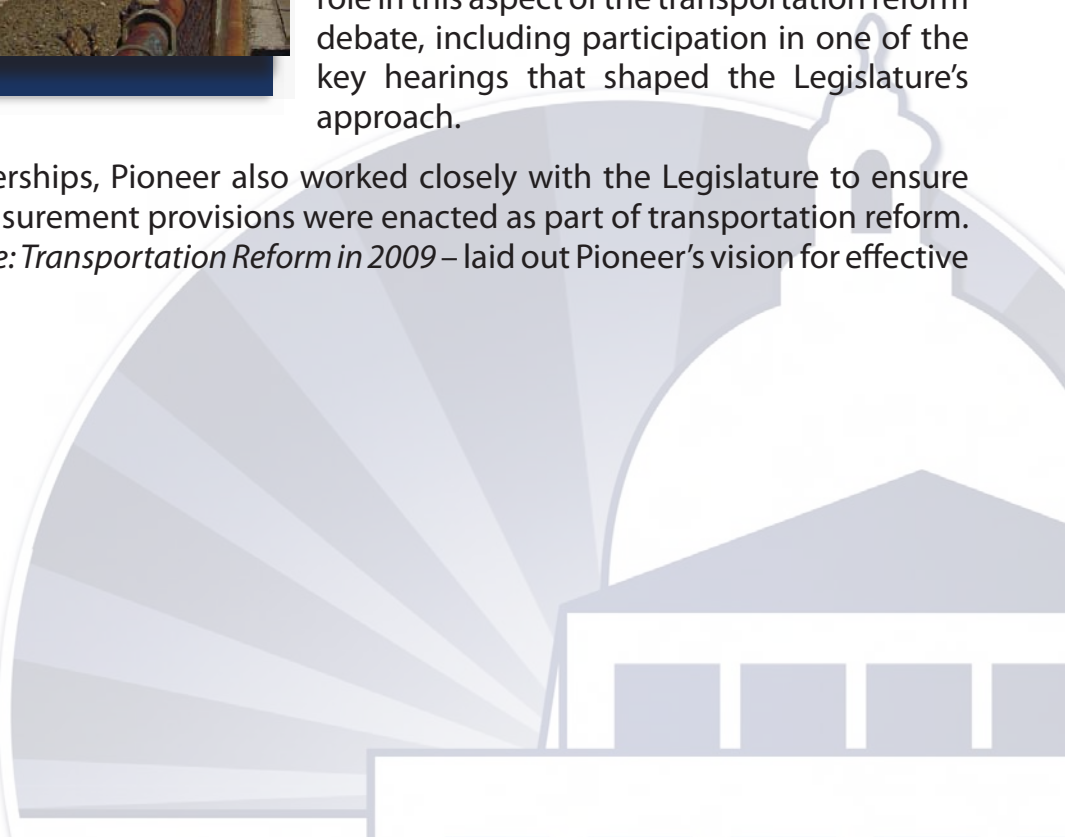
To meet the long-term budget challenges, the state will have to secure higher quality services at lower cost. There is no way to do this without expanding private sector involvement in the delivery of public services. In 2009, we made modest progress on this front; last year's budget included an increase in the dollar threshold for contracts bidding services out to private sector firms, without having to be reviewed by the state auditor.



Transportation

Applying lessons from public-private partnerships to transportation, we published two white papers on public-private partnerships for transportation infrastructure – *Life Cycle Delivery of Public Infrastructure Precedents and Opportunities for the Commonwealth* and *Lessons Learned: An Assessment of Select Public-Private Partnerships in Massachusetts*. Our thought leadership on the topic allowed Pioneer to take a leading role in this aspect of the transportation reform debate, including participation in one of the key hearings that shaped the Legislature's approach.

Beyond public-private partnerships, Pioneer also worked closely with the Legislature to ensure that strong performance measurement provisions were enacted as part of transportation reform. Our policy brief – *Getting There: Transportation Reform in 2009* – laid out Pioneer's vision for effective reform policies.





Center for Economic Opportunity

Pioneer's Center for Economic Opportunity continued its efforts to keep Massachusetts' economy competitive. The Center built on its legacy issues by pushing to keep business costs down through ongoing support of unemployment insurance reform.

The Center also focused on incubating two of Pioneer's new initiatives – Middle Cities and Health Care. Each of these initiatives, through strategic outreach and original research, addresses a key challenge facing the state's economy, namely our struggling urban communities and the spiraling costs of health care. Having started within CEO, in 2010 the Initiatives stand on their own. Their accomplishments are detailed in the following pages.

Finally, the Center for Economic Opportunity geared up in 2009 for its largest research project ever. We acquired the rights to the National Employment Time Series database for Massachusetts and have commissioned a series of papers with Dr. John Friar (below) that will explore where jobs have been created and in what industries over the last eighteen years.

In a difficult economy with high unemployment, we aim to lead the discussion of how to create jobs in the future.

Pioneer Institute Senior Fellow: John Friar

John Friar is Pioneer's Senior Fellow on Jobs and the Economy and the Executive Professor of Entrepreneurship and Innovation at Northeastern University's College of Business Administration. He has researched and written on the subjects of marketing strategy, management of innovation, and technology strategy, with emphases on radical innovations and start-up companies.



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Health Care Initiative

Pioneer's legacy in health care policy dates to our very first publication in 1988 – *The Massachusetts Health Plan: The Right Prescription?* The long-term interest of our late Chairman, Charles "Colby" Hewitt, Jr., inspired our push in 2008 and 2009 to institutionalize and sharpen our focus on bringing a common sense, free market perspective to the health care debate.

In January 2009, we released the policy brief *Massachusetts Health Care Reform: A Framework for Evaluation* which set forth a comprehensive series of metrics to assess the effectiveness of Massachusetts' efforts and to inform the national discussion on health care.

Senior Fellow on Health Care: Amy Lischko

Amy Lischko, Assistant Professor of Public Health and Community Medicine at Tufts University School of Medicine, knows Massachusetts health care. She was the Director of Health Care Policy and Commissioner of the Division of Health Care Policy and Finance during the years of the reform, and has been published widely in expert journals. She is working on a multi-part series on the health care reform act, which will be published as a book in Fall 2010, as well as the spiraling costs of Medicaid.

Beyond a focus on state-level health care reform, Pioneer has played a hands-on role in helping municipalities understand potential advantages and disadvantages of joining the health insurance purchasing pool that serves state workers. Pioneer built a decision support tool (www.gicestimator.com) that communities have used to determine the potential impacts of moving their insurance plans.

2009 Contributors

Mr. K. Douglas Briggs

Mr. James Fitzgibbons

Mr. William Gannett

Mr. Charles Hewitt III

Hewitt Family Charitable Trust

Mr. Mitchell Rabkin

Mr. Marvin Schorr

Hewitt Health Care Lecture

Every year, the Hewitt Lecture features thought leaders in health care from around the country. In 2009, Jon Kingsdale, PhD, Executive Director of the Commonwealth Health Connector, attracted a large crowd to the Harvard Club. Dr. Kingsdale discussed the successes and challenges in implementing the 2006 Health Care Reform Act.



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

The Better Government Competition: "Our Greatest Export"

Pioneer's footprint in the health care debate continues to grow and 2009's Better Government Competition was devoted to innovative ideas in health care. Pioneer received over 200 entries from across the country that provided ideas about how to improve service delivery and control costs.

The 2009 winner was SeniorLink, an innovative provider of in-home care for seniors that provides both higher quality care and lower cost services. Runners-up included successful efforts in other states to align preventive care and healthy lifestyle choices with financial incentives, as well as two Massachusetts programs that address medication and surgical errors.

The September award ceremony was highlighted by keynote speaker Dr. Mark McClellan, current Director of the Engelberg Center for Health Care Reform at the Brookings Institution, former Administrator of the Centers for Medicare and Medicaid Services and Commissioner of the Food and Drug Administration. He addressed an enthusiastic crowd of 250 on the latest developments in health care reform and gave his own views on what steps were necessary to 'bend the curve' on health care costs.

Pioneer appreciates the time and effort of our independent panel of judges: Martha Bebinger, Eric Beyer, Dr. Roberta Herman, Charles Hewitt III, Dr. Nancy Kane, Dolores Mitchell, and Delia Vetter.



Dr. Mark McClellan,
*Director, Engelberg Center for Health
Care Reform, Brookings Institution*

"Extend shared savings reform nationally, and we've basically taken care of paying for this health care cost and affordability problem."

- Dr. Mark McClellan



Middle Cities Initiative

In 2009, Pioneer deepened its relationships with municipal leaders and community advisory groups in each of the Middle Cities, produced timely research on important policy issues, and readied a web application that will give citizens open access to information about how well cities are delivering core services.

Engaging Leaders and Communities, Tackling Critical Issues

At quarterly Middle Cities Mayors Coalition meetings, we presented data sets that measure the various cities' performance in the areas of public safety, education, economic development and governmental efficiency. The purpose of this activity was to get mayors and city managers to speak peer-to-peer about who is showing the most progress in each area – and ultimately to share what works.

Pioneer continued meeting with Citizen Advisory Committees in the Middle Cities, asking for input on how to measure the quality of local services. We convened 150 residents, business owners and community leaders during the summer, and presented our final municipal performance benchmarks. To equip these citizen ambassadors with data, we developed a new web application allowing them to compare and contrast how their cities are doing (see "Spotlight on Transparency" page).

Timely Research

During the year Pioneer focused on the financial viability of our older, industrialized cities. Recent publications, *Driving the Urban Agenda* and *Learning from Springfield* articulated the need to establish clear state policies related to Middle Cities while remembering to learn and apply the lessons from recent receiverships.

In addition, Pioneer continued its work pressing cities and the state to allow greater flexibility in health insurance plan design and an opportunity to join the state's Group Insurance Commission.

By building relationships and trust with government officials, and arming citizens and leaders with data, Pioneer's goal is to promote data-driven decision making and accountability in state government.

Middle Cities Mayors' Coalition

Mayor Edward Caulfield*
Lowell

Mayor Robert Correia*
Fall River

Mayor Charles Crowley
Taunton

Mayor James Harrington*
Brockton

Mayor Scott Lang
New Bedford

Mayor Konstantina Lukes*
Worcester

Mr. Bernard Lynch
City Manager, Lowell

Mayor Dean Mazzarella
Leominster

Mr. Mike O'Brien
City Manager, Worcester

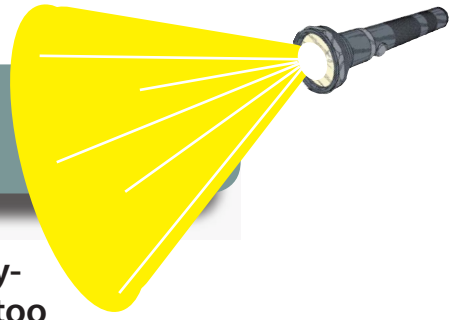
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*Term Ended in
November 2009

Spotlight on Transparency



In 2007, Pioneer began an effort to give citizens easy-to-use information and access to public data that is too often hidden from view.



MassReportCards.org: In 2009, Pioneer created this district and school rating tool to empower parents who seek better educational choices for their children, teachers and administrators who want to know how their school stacks up, researchers who are looking for consistent data, and the curious citizen who just wants to know if his or her tax dollars are well spent.



MassOpenBooks.org: We created this online tool so that you can find out how your money is being spent, whether it's contracts or state employees' salaries and pensions.

RegionalizationClearinghouse.org: Complementing our work on regionalization, we're providing municipal leaders dozens of regionalization agreements from across the state, so that they don't have to start from scratch.

IdeasforNewGovernance.org makes available the best ideas from 19 years of the Better Government Competition.



MassHousingRegulations.com, a joint initiative of Pioneer Institute and Harvard's Rappaport Institute for Greater Boston, provides developers, environmentalists, government officials and you with a comprehensive set of information on zoning codes, subdivision requirements, and environmental regulations.

Also, the newest editions of our *Navigating Guides* will be released this year.



MassCityStats.org is a searchable online application that lets you know how well your city performs in delivering services, comparing it to past years or other cities.



GICEstimator.com lets municipal employees see if joining the state Group Insurance Commission (GIC) makes financial sense for them.

A Statewide Media Strategy

Pioneer engages the public through regional and national newspapers, radio and television stations, as well as through videos, blogs, and social media.



Friend us on Facebook



Follow us on Twitter

“Using federal dollars to fulfill state [education] obligations exposes the state to a massive funding “cliff” and potential fiscal disaster when the federal money runs out in two years.”

- Jim Stergios
Boston Globe
May 30, 2009

“You can’t measure your government if you can’t measure performance... What are the outcomes of the money we are putting into government?”

- Maria Ortiz Perez
Lowell Sun
August 28, 2009

“I’m happy to see more charter schools, but worry that Governor Patrick’s proposals do not go far enough.”

- Jim Stergios
The Economist
July 18, 2009

“[P]ublic employees and taxpayers deserve a [pension] system that is completely transparent.”

- Steve Poftak
Salem News
March 30, 2009

“It would be a political disaster for anybody to be seen as reducing our ability to access [Race to the Top].”

- Jim Stergios
Wall Street Journal
July 17, 2009

“There is no question a working knowledge of US history is part of the civic principles that bind the country together. If students don’t understand history, how will they appreciate the significance of events, such as President Obama’s inaugural address?”

- Jamie Gass
Boston Globe
February 25, 2009

Pioneer Institute Senior Fellow: Charles D. Chieppo

Charles D. Chieppo is Pioneer’s Senior Media Fellow. Mr. Chieppo was previously policy director in Massachusetts’ Executive Office for Administration and Finance and directed Pioneer’s Shamie Center for Restructuring Government. While in state government, he led the successful effort to reform public construction laws, a new charter school funding formula, and worked on state workforce issues such as pension reform and easing state restrictions against privatization.



Pioneer is a frequent guest on WBZ Radio’s *Nightside* with Dan Rea, WRKO’s *Tom and Todd* with Tom Finneran and Todd Feinburg, and other radio shows.

Engaging the Public and Changing Minds

Pioneer Institute leads the intellectual climate in Massachusetts by commissioning rigorous research from leading scholars and by injecting new ideas into the public debate through forums and lectures, as well as through high quality publications, media campaigns, and outreach.

In 2008-2009, we continued our lasting commitment to education reform, hosting numerous events. *Core Academic Knowledge: Educating for Common Purposes* featured curriculum and standards expert E.D. Hirsch, professor *emeritus* at the University of Virginia, with remarks from former State Senate President Thomas Birmingham. The event reinforced Massachusetts' dedication to well-defined standards, teaching of core knowledge and to the testing of such knowledge.



In Spring 2009, Pioneer, along with national leaders, co-sponsored the event "The Know-Nothing Amendments: Barriers to School Choice", featuring Kevin Chavous, founder of Democrats for Education Reform and former D.C. City Councilor. Pioneer also hosted an event on vocational-technical schools featuring State Treasurer Tim Cahill. The event, which aimed to understand and celebrate vocational school successes, received wide media coverage.

Pioneer continued to enrich Greater Boston with our Member Breakfast series. The June edition, *Editorial Cartooning, Journalism and a Citizen's Responsibility in a New World Order*, featured Pulitzer-Prize winning cartoonist Michael Ramirez of *Investor's Business Daily*. The annual celebration of the life and legacy of Milton Friedman, featuring Dr. Jeffrey A. Miron, Senior Lecturer and Director of Undergraduate Studies in the Department of Economics at Harvard University, was held in July.



And to introduce our efforts to make state expenses, salaries and pensions and school district data available online, we kicked off the release of our websites MassOpenBooks and MassReportCards in an event held at Vinalia Lounge that attracted mostly young people interested in transparency and accountability in government.

Of course, our marquee events – the Lovett C. Peters Lecture, the Better Government Awards ceremony, and the Hewitt Health Care Lecture – drew business and community leaders from across the state. We are only as strong as our community of supporters. By engaging and changing minds on key issues, that community is sure to grow.

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Gifts listed reflect Pioneer's 2009 fiscal year
(October 1, 2008 to September 30, 2009)

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Coghlin Family Foundation
Mr. Gerald Conway
Mr. Robert Croce
Mr. Michael Cronin
Mr. John Davis
Mr. Michael Davis
Mr. Andrew Davis
Deaconess Collaborative Radiology
Mr. Gary DiCamillo
Ms. Kathy Dietz
Ms. Harriet Dobbins
Doran Family Charitable Trust
Mr. Joseph Downing
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Durant Family Foundation
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Mr. David Evans
Excelsior Foundation
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Fidelity Investments
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Mr. Morris Gray
Mr. John Hall
Robert Hanss, Inc.
Harvard Pilgrim Health Care

Mr. William Hayes
Heritage Foundation
Ms. Lucille Hicks
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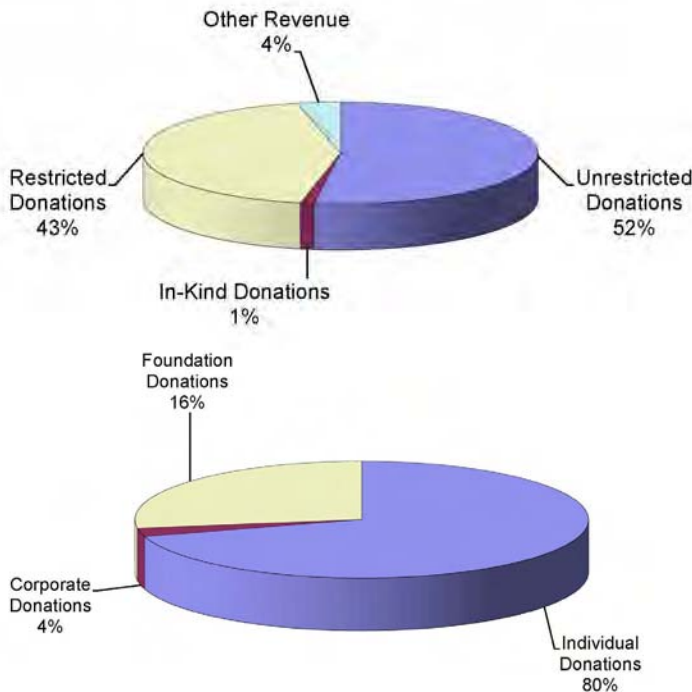
Profit & Loss

Income	
Unrestricted Donations	\$716,088
In-Kind Donations	15,000
Restricted Donations	592,944
Other Revenue	48,898
Total Income	\$1,372,930
Expenses	
Employment Costs	\$772,897
Outside Services	77,449
Research	104,490
Printing & Publishing	56,530
Distribution Costs	35,715
Events and Meetings	134,845
Staff Business Expenses	21,608
Office Operations	142,231
Internet/Website	2,343
Total Expenses	\$1,348,106
Other Income	\$53,156
Other Expenses	(11,691)
Net Income/(Loss)	\$66,290

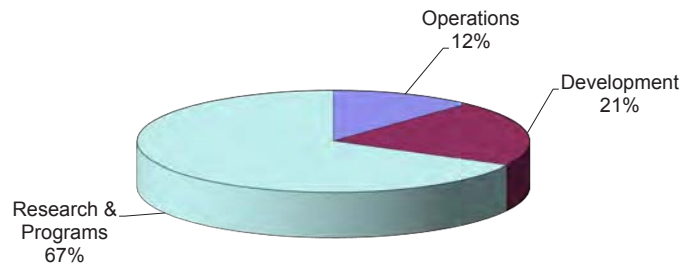
Balance Sheet

Assets	
Cash	\$531,050
Contributions Receivable	2,900
Investments	1,200,771
Fixed Assets	17,570
Other Assets	28,657
Total Assets	\$1,780,948
Liabilities and Equity	
Liabilities	
Accounts Payable	\$58,627
Other Current Liabilities	35,956
Total Liabilities	\$94,583
Equity	
Unrestricted Funds	\$984,989
Temporarily Restricted Funds	436,337
Permanently Restricted Funds	198,749
Net Income	66,290
Total Equity	\$1,686,365
Total Liabilities and Equity	\$1,780,948

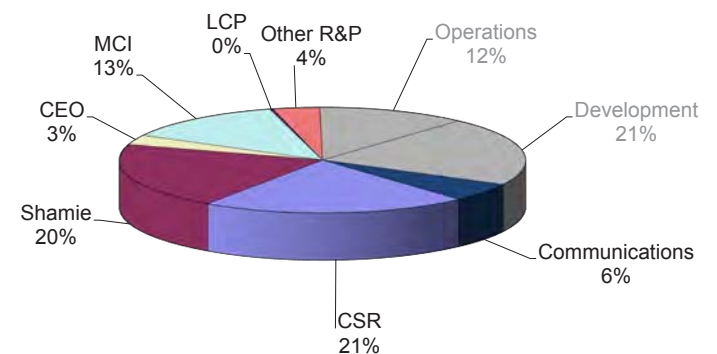
Revenues



Expenses by category



Expenses research & programs' share of total expenditures



2009 Donors

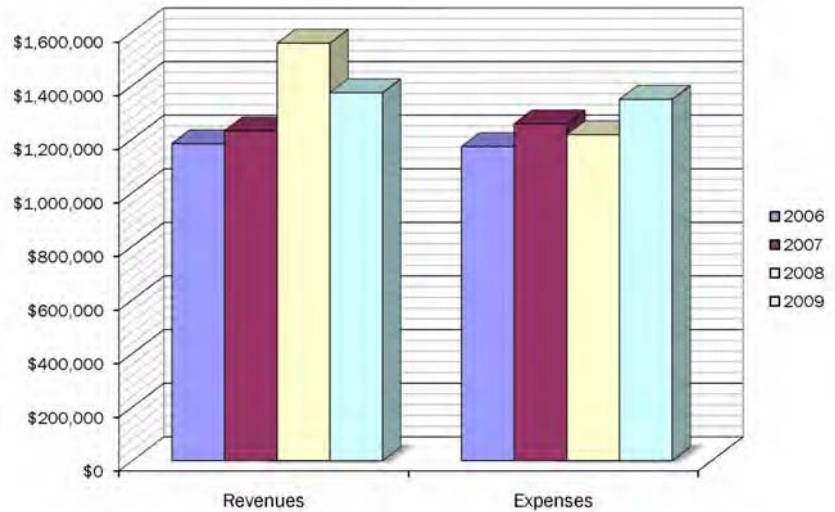
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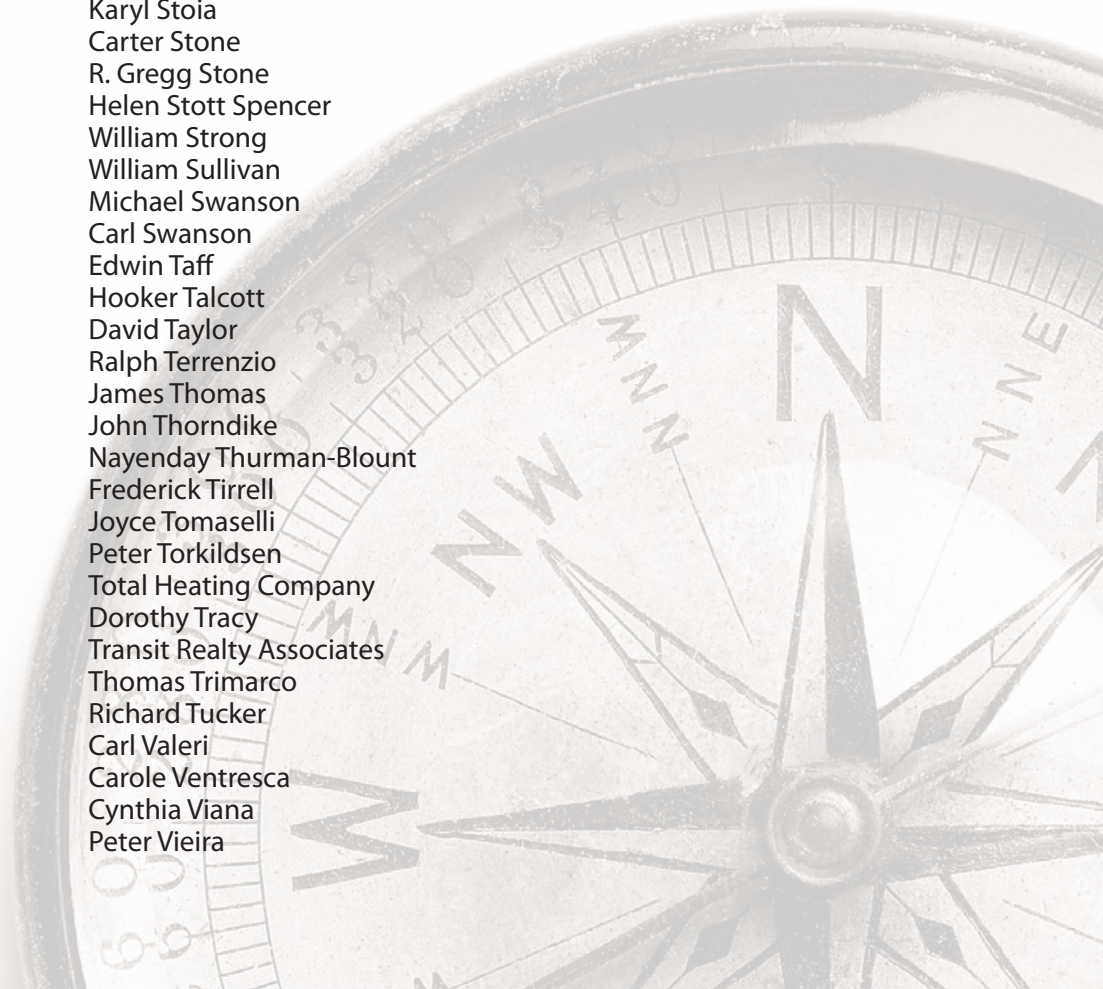


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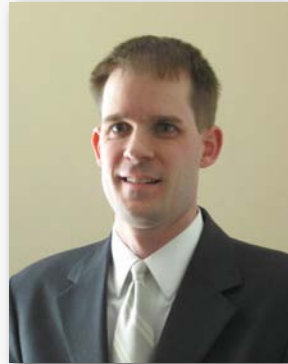
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