

A NEW GENERATION BUILDING SOLUTIONS



PIONEER INSTITUTE
2010 ANNUAL REPORT



Our Mission

Founded in 1988, Pioneer Institute is an independent, non-partisan, privately funded research organization that seeks to improve the quality of life in Massachusetts through civic discourse and intellectually rigorous, data-driven public policy solutions based on free market principles, individual liberty and responsibility, and the ideal of effective, limited and accountable government.

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Center for School Reform

The Center for School Reform builds on Pioneer's legacy as a leader in the charter public school movement and a champion of greater academic rigor in Massachusetts' schools. The Center promotes choice and competition, school-based management, and high-quality academic standards.



Center for Better Government

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



Center for Economic Opportunity

The Center for Economic Opportunity works to keep Massachusetts competitive by creating jobs and by reducing the cost of living and doing business.



Health Care Initiative

The Health Care Initiative explores market-based reforms to rein in costs and improve the quality of care in Massachusetts.



Middle Cities Initiative

The Middle Cities Initiative connects state and municipal officials to revitalize older, industrial urban centers through the exchange of best practices, use of performance management metrics, and transparency.

Pioneer by the Numbers: 2010

26 PUBLICATIONS
research papers, policy briefs, and event transcripts

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

110 ATTENDEES
average per Pioneer event

14 EVENTS
featuring Pioneer



*All figures reflect Pioneer's 2010 fiscal year:
October 1, 2009 through September 30, 2010*

A New Generation – Building Solutions

2010 started with legislation that doubled the number of students in charter schools. It ended with the passing of our founder, Lovett C. “Pete” Peters, who, when charters were just a concept, led the charge to make them a reality. Throughout the years, Pete and Pioneer have reached out to supporters and opponents alike to debate the merits of charter schools, along with a comprehensive slate of education reforms. Today, many of those reforms have gained broad appeal across the political spectrum.

Change requires building support and a willingness to take chances. It also takes direction—therefore, principles. The charter school movement today can boast a who’s who of supporters, including prominent foundations, business groups, the Boston Mayor and Massachusetts Governor, even the President of the United States. Such progress stands as a tribute to a great person and the value of bold ideas.

It is also testament to traits that defined Pete throughout his careers in the private sector and as a social entrepreneur: His trust in future generations and deep intellectual curiosity about their ability to innovate. These twin attributes are what gave Pete an extraordinary ability to spot young talent.

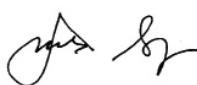
In 2011 Pioneer enters a new phase in its development. To paraphrase John F. Kennedy’s inaugural speech, “Let the word go forth from this time and place...the torch has been passed to a new generation”—of Pioneers.

We have reason for thanks and confidence. Our mission—the mission Pete and Ruth Peters established and so diligently pursued—is clear and powerful. Our history of accomplishment is long and consistent. We have a growing community of loyal supporters; a robust, highly focused pipeline of work; a secure balance sheet; the strongest media presence of any think tank in the Commonwealth; and a growing influence nationally.


Our strategic plan, adopted last October with Pete’s support, deepens our commitment to education reforms that include charter schools and school choice, academic standards, accountability, and digital learning opportunities. The plan also raises health care to a top priority, building on five years’ work to establish a strong foundation of research, media relations and impact. We remain focused on promoting effective and limited government in order to address crushing liabilities and bureaucratic sprawl, and to advance a fair and predictable climate for entrepreneurs.

We thank you, our supporters, and ask that you renew your commitment to Pioneer’s aspirations. Your generous investment of time and treasure makes our work possible—and brings greater opportunity, prosperity and freedom to Massachusetts.




James Stergios
Executive Director




William B. Tyler
Chairman



Center for School Reform

In 2010, Pioneer built on its legacy of promoting educational opportunity for all students via charter schools and school choice, high academic standards, objective testing and accountability.

With the advice and support of top national policymakers and scholars, Pioneer has played a leading role in taking education reform to the next level by documenting successful K-12 policies; advocating for academic quality, data-driven research; and engaging in robust public debate through the media.

NATIONAL STANDARDS: A RACE TO THE MIDDLE

The push for national K-12 education standards re-emerged during the past year. This time, Washington, D.C.-based trade organizations, none of which can claim any education policy success, lobbied the Obama Administration to make adoption of the national standards one of the criteria for states applying for federal Race to the Top (RTTT) grant funds.



Sandra Stotsky

Ze'ev Wurman

Pioneer was the most active research institute in the country on the topic, teaming with the California-based Pacific Research Institute to conduct four independent analyses that compared various drafts of the national standards with those in states that have rigorous standards, such as Massachusetts, California, Indiana, Minnesota, and Texas. The reports' authors included Stanford University mathematician Dr. R. James Milgram; Ze'ev Wurman, a Silicon Valley executive active in developing California's standards; and Dr. Sandra Stotsky, a former member of the Massachusetts Board of Elementary and Secondary Education and University of Arkansas professor, who previously developed the best-in-the-nation Massachusetts standards.

Based on the quality of the Commonwealth's state standards, corroborated by Massachusetts' unique success on national and international testing, Pioneer demonstrated specific ways in which adopting the national standards would be detrimental to our students.

Pioneer's research attracted support and praise from widely divergent political figures and policy entities including two co-authors of the landmark Massachusetts Education Reform law (1993 MERA) – former Governor William Weld and former Senate President Thomas Birmingham; Massachusetts gubernatorial candidates Charlie Baker and Tim Cahill; United States Senator Scott Brown; the Massachusetts Federation of Teachers; and the Heritage Foundation, and the Cato Institute.

Pioneer's research, media work, and advocacy for higher academic standards attracted national media attention from *The Wall Street Journal*, *The New York Times*, *Business Week*, *The Hechinger Report*, *Education Week*, *The Economist*, and newspaper editorial boards across New England and the country; NECN and WCVB TV; and WBUR, WRKO, and WBZ radio.

THE SOFT SKILLS DEBATE: SACRIFICING WHAT IS TRUE FOR WHAT IS NEW

Pioneer continued to advocate for more rigorous liberal arts standards and objective student assessments as the basis for education reform and bridging achievement gaps. The Institute played a leading, national role in analyzing and critiquing 21st-Century Skills as the false basis for education reform standards.

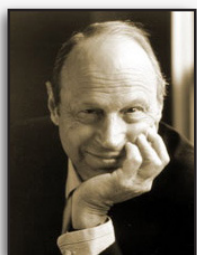
In December 2008, Pioneer co-sponsored the event, *Core Academic Knowledge: Educating for Common Purposes*, featuring Dr. E.D. Hirsch, Thomas Birmingham, and other experts discussing K-12 academic

standards and the ill-defined 21st-Century Skills. Pioneer's work spurred a two-year national debate on this topic.

With Common Core, a liberal arts advocacy group in Washington, D.C., Pioneer assembled an intellectually diverse group of scholars, teachers, education reform advocates, and union leaders, including American Federation of Teachers President Randi Weingarten; former Boston University President John Silber; New York University education historian Dr. Diane Ravitch; and Democrats for Education Reform co-founders Kevin Chavous and Whitney Tilson. This coalition issued a national statement and letter expressing concern about the program put forth by the Partnership for 21st-Century Skills and calling for its dramatic revision.

"The latest fad to sweep K-12 education is called '21st-Century Skills.'"

Diane Ravitch, noted education historian



E.D. Hirsch, Jr.



Andrew Rotherham

RESTORING UNITED STATES HISTORY AND CIVICS EDUCATION

Pioneer joined with co-sponsors Democrats for Education Reform, Harvard University's Program on Education Policy and Governance, Common Core, and *The Concord Review* to hold a spring event entitled "The Sacred Fire of Liberty: U.S. History Education & Civic Engagement," highlighting the importance of U.S. History and civic education. After an introduction from former Clinton administration education advisor Andrew Rotherham, the keynote was delivered by Dr. E.D. Hirsch, Jr., founder and chairman of the Core Knowledge Foundation. In his remarks, Dr. Hirsch attributed a dramatic

half-century decline in American students' knowledge of U.S. History and civics to a simple failure to teach it stemming from complacency about the proper function of schools in a democracy.

Meanwhile, in the "cradle of liberty," the Massachusetts Board of Elementary and Secondary Education postponed making passage of an MCAS test in U.S. History a high school graduation requirement. Under Massachusetts law, U.S. History was to join English language arts, math and science as a high school graduation requirement beginning with the class of 2012.

Working with state leaders of the national "We the People" civic education program and the Massachusetts Council for the Social Studies, Pioneer has been campaigning to restore the U.S. History MCAS graduation requirement. Partnering with teachers and the media, Pioneer placed op-eds that received wide media coverage and earned support from the *Boston Herald*, the *Lowell Sun*, the *Worcester Telegram & Gazette*, and WRKO and WBZ radio.

"Through its work, Pioneer shows that education does not have to be a partisan issue."

Andrew Rotherham,

**Co-Founder and Partner of Bellwether Education,
Co-Founder and Publisher of Education Sector**

MASSACHUSETTS CHARTER PUBLIC SCHOOLS: CLOSING THE ACHIEVEMENT GAP

Despite several new state constraints on charter schools, 2009-2010 was an historic year for charters in Massachusetts. Together with an increasingly broad coalition of partners, Pioneer worked to raise caps on charter school expansion, allowing over 27,000 more students access to charters, which have a proven record of closing race- and poverty-based achievement gaps.

Days before the Legislature voted to lift charter school caps, Pioneer and its co-sponsors, Massachusetts Business Alliance for Education and the Massachusetts Charter Public School Association, held an event featuring keynote remarks from Whitney Tilson, co-founder of Democrats for Education Reform, to discuss the need for broad charter school expansion in the Commonwealth. Before a packed audience of policy



Whitney Tilson

makers, political leaders and interested citizens, Tilson's remarks built on a Pioneer campaign which included three data-driven research papers (*Putting Children First: The History of Charter Public Schools in Massachusetts*; *Follow the Money: Charter School and District Funding in Massachusetts*; and *Debunking the Myths About Charter Public Schools*); numerous op-eds; editorial board meetings; radio and television appearances; half a dozen videos; a thousand letters from our community of supporters; and meetings with legislators.

Kerry Healey on NECN's *Broadside*

SAVING SCHOOLS: CHARTER SCHOOLS, SCHOOL CHOICE, VIRTUAL LEARNING

During the statewide policy debate on how to close achievement gaps, Pioneer's work to give all Massachusetts kids access to great educational opportunities was not limited to charter schools. Pioneer also advocated for digital learning opportunities. As part of the *2010 Act Relative to the Achievement Gap*, we were pleased to see language supportive of online educational innovation. In July, we were less pleased to see regulations restricting online learning promulgated by the state Department and Board of Elementary and Secondary Education.

With Harvard's Program on Education Policy and Governance, Pioneer co-hosted an event on school innovation that featured a keynote address from Dr. Paul Peterson, Pioneer advisor and Shattuck Professor of Government and Director of the Program on Education Policy and Governance at Harvard University, detailing his book *Saving Schools: From Horace Mann to Virtual Learning*. Panelists included Clayton M. Christensen, Harvard Business School Professor, Dr. Charles Glenn, Boston University School of Education Professor, and Richard Kahlenberg, Senior Fellow of The Century Foundation. This event marked the start of a new media campaign and follow-up research about private school choice and digital learning.



Paul Peterson

The Lovett C. Peters Lecture in Public Policy

In November 2010, we celebrated the 13th annual Lovett C. Peters Lecture in Public Policy, which honors individuals distinguished for the significance of their accomplishments and contributions to society, whose careers have enriched our intellectual climate and demonstrated tangible achievements.

"Accountability truly matters. You get the result that you aspire to if you execute properly. Just as Massachusetts is the beacon for higher standards, Florida is the beacon for accountability."

– Jeb Bush, *former Governor of Florida*

Our keynote speaker was Jeb Bush, former Governor of Florida and Chairman, Foundation for Excellence in Education. He described his state's extraordinary success in raising student performance through accountability, school choice, and virtual learning.

The lecture was especially meaningful because of the passing, just days before, of Pioneer's founder, Lovett C. "Pete" Peters, a tireless and trailblazing proponent of education reform. Distinguished speakers at the event included 2010 Massachusetts gubernatorial candidate Charles Baker, Jr., and Chairman Emeritus of State Street Bank, William Edgerly, who paid tribute to Pete's life and legacy.



Jeb Bush

 Center for Better Government

In 2010, Pioneer’s Center for Better Government offered policy-makers research and resources that advanced the Center’s goals of transparency, fiscal sustainability, and government efficiency.

TRANSPARENCY

The Center built and operates a website – www.massopenbooks.org – which was the first website in the state to post state salaries, pensions, and all state spending in a comprehensive, fully searchable and downloadable format. Imitation being the sincerest form of flattery, Treasurer Steven Grossman has promised to institutionalize such a state spending transparency website.

EFFECTIVE AND SUSTAINABLE GOVERNMENT

Starting in 2006, the Institute has made reform of the **public pensions** system a priority. Earlier work examined the wisdom of Massachusetts having 106 separate public pension funds; another focused on the state’s unfunded pension and other post-employment benefit liabilities. A number of reforms have resulted—reforms that will yield substantial savings.

The Center built on previous public pension reform efforts by producing *Rhetoric and Reality*, an analysis of actual pension payouts. In the midst of a public debate marked by distortions and partial data, the report provided clarity on pension costs and the size of payouts received by major public employee groups.

“[Extending the pension funding schedule] burdens future taxpayers with an unfunded liability that’s not their fault. Moreover, it delays dealing with the similarly massive unfunded liability associated with retiree health benefits.”

Steve Poftak, in the *State House News Service*

Much like the tens of billions of dollars in pension and benefit liabilities, our liabilities for deficient **transportation infrastructure** weigh on Massachusetts’ citizens. Building on our long-term priority to reform Massachusetts’ transportation policy and governance, the Center has focused on effective implementation of the 2008 restructuring of state transportation agencies.

In 2010, the Center hosted three state transportation commissioners at a May forum, highlighting both the challenges facing transportation managers, and methods such as strategic implementation of technology that can save money and provide customers with better service.



LEVERAGING ELECTIONS

Campaigns are a great opportunity to focus public attention on effective policy options. The Center started the year partnering with the Boston Municipal Research Bureau to produce *A Vision for Boston: Questions for Boston’s Mayoral Candidates*—an effort to drive our policy agenda into the Boston mayoral race. The project consisted of 12 daily issues briefs with responses from the candidates to public policy questions. It was expanded to include the At-Large City Council candidates in the same election and was promoted daily in a special section on the *Boston Globe’s* website.

At the end of 2010, Pioneer produced its *Agenda for Leadership*, a blueprint to reshape the Commonwealth, which was distributed to major statewide candidates and debate-sponsoring organizations.

The Better Government Competition: “Our Greatest Export”

The 19th Better Government Competition focused on ways forward in a time of crisis – ideas and programs that provide savings, reduce redundancies, and avoid future financial difficulties. The 2010 winners, chosen from nearly 200 submissions, expand transparency in government; enact strong budget, program and governance reforms; and, of course, stretch dollars to ensure that we lend a helping hand to the needy.

The 2010 winner was the Massachusetts Housing and Shelter Alliance. The winning idea, *Containing the Cost of Medicaid by Providing Housing for Homeless Individuals*, improves the quality and reduces the cost of community-based Medicaid services and housing for the chronically homeless. Meeting our obligations to those in need does not always mean spending more money.

The June Awards Dinner featured a keynote address by U.S. Senator Scott Brown, whose January 2010 special election victory made front-page news across the country. Previously, Senator Brown served in the Massachusetts State Senate, the State House of Representatives, and as a Wrentham selectman. He has always advocated for free markets and fought against wasteful government spending and higher taxes.

We thank our distinguished panel of independent judges who generously contributed time and energy to making the 2010 Competition a great success: Katherine Craven, Andrew Davis, the Honorable Kerry M. Healey, Keith Hylton, Wendy Lane, Avi Nelson, and John O’Leary.



U.S. Senator Scott Brown

“Government has to be held accountable... [c]itizens want their representatives to do better. But with these problems we have amazing opportunities. There is hope for the future.”

- U.S. Senator Scott Brown

 Center for Economic Opportunity

At the current recession's lowest point, 300,000 Massachusetts residents were out of work. The Center for Economic Opportunity focused on ways to turn around the state's performance, which was dismal compared to the rest of the nation. Our 2010 goals were to use the very best data to articulate the scope of the challenges and to question key concepts underpinning the Patrick administration's sector-specific economic development strategy.



The Center's Senior Fellow on Jobs and Economy, Northeastern University Professor John Friar, has been mining a database covering all firms in Massachusetts going back two decades. In 2010, Dr. Friar produced three foundational studies: *Failure to Thrive*, *Heading Down*, and *Playing the Lottery*. These studies demonstrated:

1. The Massachusetts job market's volatility, with 600,000 jobs a year created or destroyed
2. The marked slowdown in the creation of start-up businesses after the 2001 recession
3. The relative unimportance of firm relocation in and out of state
4. The closure of one-third, over 5,000, of Massachusetts' corporate headquarters in the last 20 years
5. The loss of jobs to states with more hospitable business climates

Overall, state government's focus on using tax dollars to make public investments, picking winners and losers in the business community has had meager results. Thus, Pioneer has paired its empirical work with a series of media campaigns questioning the state's focus on "sweet spot industries."

"The Massachusetts economy is the most important issue facing policymakers today. This paper makes an invaluable contribution to that understanding, and I look forward to future work by Pioneer on these critical issues facing our economy and our collective livelihood."

**Senate President Therese Murray, on Pioneer's
"Failure to Thrive" report**

A better way forward is to set clear and predictable rules, and to make all research and development, investment and job creation incentives broad-based. In 2010, Pioneer provided useful advice to state leaders seeking to consolidate the state's myriad economic development agencies. Also, Pioneer partnered with the Massachusetts High Technology Council to survey chief executives of innovation sector businesses on what it would take for them to choose to grow in Massachusetts. With the release of *Keeping Massachusetts Competitive*, Pioneer highlighted where Massachusetts is falling behind its competitors on business taxation and costs.

At the end of the fiscal year, Pioneer began a campaign to oppose a 40 percent increase in the tax on employers the state uses to fund unemployment insurance benefits. Building on previous research findings that Massachusetts has the most generous unemployment insurance program in the nation, Pioneer successfully advocated for a one-year freeze on rate hikes. Using the window provided by the freeze, Pioneer will work to achieve longer-term unemployment insurance reform.



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?* For the past five years we have been building our capacity and expertise through the Hewitt Health Care Lecture Series, the creation of an endowment to support our efforts, and numerous events and reports. Though difficult, our goals of fixing the Massachusetts health reform and reforming our Medicaid system are achievable with consistent, high-quality effort.

On the research front, Pioneer released *Drawing Lessons: Different Results from State Health Insurance Exchanges*, which examined the only two state-based exchange models, in Utah and Massachusetts, with the goal of demonstrating what we might learn from other states.

Building on our 2009 report, *A Framework for Evaluation*, Pioneer spent the winter and spring producing and marketing a four-part series of report cards on the outcomes of the Massachusetts health care reform. The reports utilized a comprehensive dashboard of metrics that included access to care, financial sustainability, administrative efficiency, and cost and quality of care to assess the reform's performance. Pioneer's 2011 health care research is well-positioned to inform the policy debate here in Massachusetts and in the 48 other states that are required to establish exchanges under the federal health law.

In September, Pioneer's Board of Directors approved a new strategic plan, which makes health care the Institute's second priority after education. In tandem with that decision, Pioneer hired Joshua Archambault to direct our Health Care Initiative.

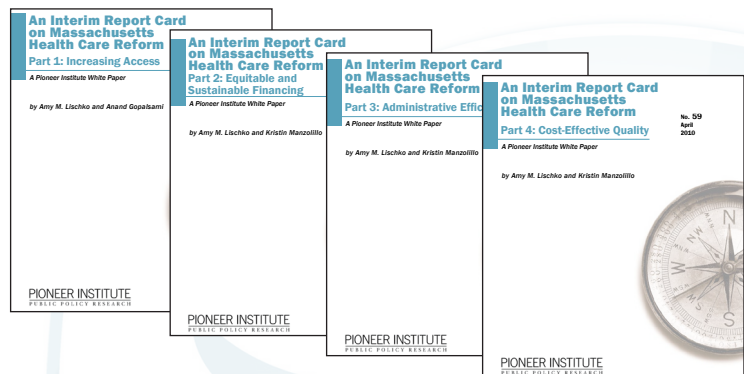
"The Commonwealth's 2006 health care reform was supposed to help address rising health insurance costs for small businesses. It hasn't and small businesses are paying the price."

- Jim Stergios & Amy Lischko, in the *Boston Globe*

2010 Endowment Contributors

Mr. K. Douglas Briggs
Mr. Charles Hewitt III
Mr. Marvin Schorr

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



Hewitt Health Care Lecture

In memory of Pioneer's late Chairman, Charles "Colby" Hewitt, Jr., Pioneer's annual Hewitt Lecture assembled health care leaders from the region to hear a timely analysis and critique of the federal health care legislation days after its passage.

"Transparency in the pricing of health care services and health care quality measures is absolutely necessary if a consumer-driven health care system is to be successful."

- Dr. Jeffrey Flier



The 2010 lecture, delivered by the Dean of Harvard Medical School, Jeffrey Flier, MD, was distributed to medical schools and policy leaders around the country.



Middle Cities Initiative

The current fiscal crisis is unlike any we have seen in two decades. For the older industrialized cities outside the Boston orbit, the financial strains are enormous. Some cities have laid off hundreds of municipal employees, making the provision of basic public services like public safety an even greater challenge. In 2006, Pioneer began its Middle Cities Initiative. Since then, we have met frequently with elected and appointed officials to promote data-driven decision making and accountability, and to help local leaders think through how to address the core quality of life issues: good schools, safe streets, predictable and sustainable finances, and a more attractive business climate.



We have maintained and improved our MassCityStats.org web tool, which makes performance data and comparisons available across cities and time. Are your schools getting better? Is your city managing its money better than a comparable city? We believe citizens and leaders need this data to ensure effective government.

During the spring, Pioneer continued outreach to city and state officials as well as the media through its release of the *Municipal Benchmarks* series. These white papers paint a picture of how the Middle Cities are faring on the four quality of life issues. In *A Look at Educational Achievement*, Dr. Robert Gaudet evaluated the educational performance of the 14 Middle Cities, highlighting six cities that have not only academically outperformed their peer cities, but have also beaten predicted outcomes estimated on the poverty levels in each district.

“In many cases, affordable units can draw stable families into poor neighborhoods. But as the Pioneer Institute pointed out in a separate study, the deed restrictions limiting the income level of buyers can place a long-term freeze on a neighborhood’s prospects.”

- Boston Globe editorial

In *A Look at Economic Growth*, Ezra Haber Glenn found that despite millions of dollars in state and federal aid and the best intentions of activists, public officials, businesses, and nonprofits, the results of efforts to improve the business climate in Middle Cities have been mixed at best. The paper proposed a way to benchmark these cities and identify areas of strength and weakness. The methodology focused on three particular indicators—percentage of vacant residential units in a community, value of owner occupied housing, and level of commercial and industrial development.

In *A Look at Financial Management*, Pioneer Senior Fellow Stephen Lisauskas examined the financial challenges the 14 Middle Cities face. It reviewed the cost of health insurance, education funding, and the unique challenge of tax exempt properties. The report utilized each city’s bond rating as an indicator to assess overall financial management and health.

Pioneer continues to offer technical assistance on data-driven decision making through the StatNet community, of which it is a founding member, together with the Collins Center at UMass Boston and Harvard’s Rappaport Institute.



Senior Fellows



SENIOR FELLOW ON HEALTH CARE

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 2011, as well as the spiraling costs of Medicaid.



SENIOR FELLOW ON JOBS AND THE ECONOMY

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.



SENIOR FELLOW ON URBAN REVITALIZATION

Stephen Lisauskas served as deputy executive director and then executive director of the Springfield Finance Control Board, where he oversaw the finances and day-to-day administration of a city with 7,000 employees, a \$643 million operating budget and \$260 million in ongoing capital investment. Lisauskas implemented a variety of innovative programs in Springfield, including the Springfield Promise Program, CitiStat, StatNet, 311, Internal Audit, the Productivity Bank. He has led or participated in four municipal turnaround projects, including three in Massachusetts.



SENIOR MEDIA FELLOW

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.



Spotlight on Transparency

Pioneer Institute spearheaded an effort over the past two years to provide online applications that empower all citizens to access the information they need to make informed life choices.



MassReportCards.org: Parents can learn about their local public schools and school district, find out how well they perform, compare them with other schools from across Massachusetts, view Pioneer's rating, or assign their own rating.



MassOpenBooks.org: For the first time, citizens and policymakers can access government spending data through this searchable database of every payment by the state over the last three fiscal years. It is searchable by agency, account, payment type, and recipient.

MassRegionalization.org: Municipal leaders can review regionalization agreements from across the state all in one place, drawing on them for budget savings and service improvement ideas.



MassHousingRegulations.com: Officials, developers, environmentalists, and interested citizens can search this database by regulation or locality for information on the zoning codes, subdivision requirements, and environmental regulations governing land use in many Massachusetts communities.



MassCityStats.org: Users can search municipal data to compare cities' service delivery performance with that of other cities or prior years.



GICEstimator.com: Municipal employees, retirees, and survivors can compare the cost of their current health plans to the GIC's plans and estimate the impact of switching to GIC's insurance plans on premium and out-of-pocket costs.

Statewide and National Media Strategy

Pioneer continues to build out its consistent media presence with newspaper, radio and television appearances in regional, state, and national markets, as well as through videos, blogs and social media.



“[National education standards] are definitely going to be adopted. Vocabulary-building in the common core is slower, and on the math side, they don’t prepare eighth-grade students for algebra one, which is the gateway to higher math.”
- Jim Stergios, *New York Times*

“It took six years to create successful academic standards in Massachusetts; the Obama administration is pressuring the state to give them up for inferior national standards.”
- Jim Stergios & Charles Chieppo
Wall Street Journal

“Our standards and the MCAS are the lifeblood of the entire reform effort that began in ’93. What’s our competitive advantage if we get rid of the high standards and the MCAS?”
- Jim Stergios, *Boston Globe*

“...[T]he next governor and the connector board must remember that small business is the backbone of the state’s economy and [affordability is] a crucial gauge of health care reform’s sustainability.”
- Joshua Archambault, *Taunton Gazette*

“It’s clear that Worcester is getting smaller companies or legal entities that aren’t among the larger firms. We see cities with larger employers clustered in the metro Boston area.”
- Steve Poftak
Worcester Telegram & Gazette

“We are selling our souls for \$250 million in one-time money. Comparing that to the \$9 billion that we spend every year on K-12 education, that’s not very much money to give up the best standards in the country.”
- Jim Stergios, *WBUR*

“States have become exasperated by the [Race to the Top] process. The reality is that with all the staff time and budget restructuring many states are wondering if it’s worthwhile.”
- Jamie Gass, *Bloomberg BusinessWeek*



Rock the Schoolhouse

Jim Stergios on the best ways to lead tomorrow's America

Jim Stergios regularly shares insightful commentary on local, state and national education policy through his Boston.com blog, “Rock the Schoolhouse.”

Pioneer’s Executive Director and research directors frequently appear on WBZ’s *Nightside with Dan Rea*, WRKO’s *Tom and Todd* with Tom Finneran and Todd Feinburg, and other talk radio programs. During 2010’s campaign season, Pioneer teamed up with *Tom and Todd* to host a candidates’ forum that aired at weekly intervals.

Engaging the Public through Civic Discourse

Pioneer Institute promotes civic discourse and direct public engagement with policymakers at all levels. Pioneer injects new ideas into the public sphere through a sustained and respected media presence spanning the length and breadth of the state. Pioneer also hosts numerous events and forums that enable the public to engage directly with key players on the public policy scene. The events enjoy broad appeal among professionals and community leaders across the state.

In 2009-10, Pioneer hosted numerous panel discussions focusing on our recent research on transportation infrastructure and education reform. Pioneer's policy forums offer a unique, in-depth look into specific areas of public policy that affect our community and our Commonwealth. Offered several times each year, these events feature expert panelists, high-profile keynote speakers, and an exclusive opportunity for interaction with policy experts on topics of vital public interest.



Our May 2010 forum on "Transforming Transportation" hosted transportation commissioners from Massachusetts, New Jersey and New Hampshire

Pioneer's quarterly Member Breakfast series is presented exclusively for members of our organization, including local business leaders, state policy makers, and individuals who support Pioneer's vision of effective, limited and accountable government. Hosted at prestigious venues throughout the city, the Member Breakfast series provides members with the opportunity for in-depth exposure to a broad range of topics. Pioneer attracts presenters who are experts in their fields and welcome the informal yet engaging atmosphere of these events. The intimate setting of the events encourages our speakers to engage their audience in lively discussion and casual question-and-answer settings.

In addition to a varied portfolio of policy events throughout the year, Pioneer also holds three annual signature events: the Lovett C. Peters Lecture, the Better Government Competition Awards Dinner and Ceremony, and the Hewitt Health Care Lecture. The **Hewitt Health Care Lecture** presents timely issues in health care policy to a select crowd of influential leaders in the medical, research, policy, and business arenas. The **Better Government Competition** seeks out citizen ideas to establish more effective government and promotes select ideas to legislators across the nation. The **Lovett C. Peters Lecture**, named in honor of our venerated founder and focusing on education policy, is Pioneer's way of thanking our supporters, sponsors, and advocates. Pioneer relies on the support of our growing list of core members to help us engage and persuade on key issues.

Pioneer Lead Donors

Gifts listed reflect Pioneer's 2010 fiscal year
(October 1, 2009 to September 30, 2010)

PETERS SOCIETY (\$100,000+)

Mr. David Koch

Mr. Lovett C. Peters

FOUNDERS (\$50,000+)

Mr. Mark Rickabaugh

CHAIRMAN'S CIRCLE (\$25,000+)

Flatley Foundation
Northern Trust Charitable
Giving Program

Mr. C. Bruce Johnstone
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Mr. Kingman Webster

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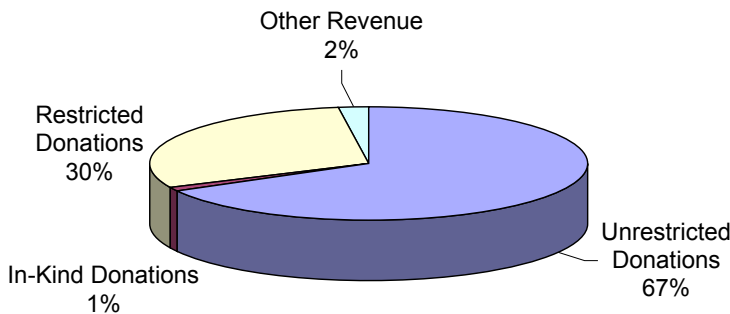
Profit & Loss

Income	
Unrestricted Donations	\$863,505
In-Kind Donations	15,000
Restricted Donations	385,104
Other Revenue	28,032
Total Income	\$1,291,641
Expenses	
Employment Costs	\$816,589
Outside Services	95,760
Research	74,415
Printing & Publishing	26,035
Distribution Costs	29,640
Events and Meetings	134,126
Staff Business Expenses	22,222
Office Operations	122,109
Internet/Website	4,795
Total Expenses	\$1,325,691
Other Income	\$80,449
Other Expenses	(16,939)
Net Income/(Loss)	\$29,460

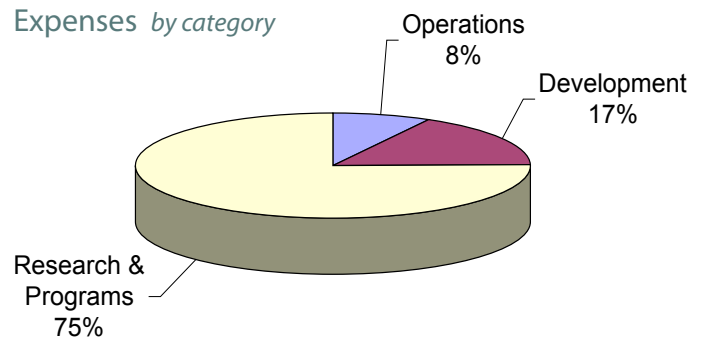
Balance Sheet

Assets	
Cash	\$527,927
Contributions Receivable	29,512
Investments	1,153,268
Fixed Assets	18,403
Other Assets	33,542
Total Assets	\$1,762,652
Liabilities and Equity	
Liabilities	
Accounts Payable & Other Accrued Expenses	\$46,828
Total Liabilities	\$46,828
Equity	
Unrestricted Funds	\$1,120,166
Temporarily Restricted Funds	326,165
Permanently Restricted Funds	203,203
Net Income	66,290
Total Equity	\$1,762,652
Total Liabilities and Equity	\$1,762,652

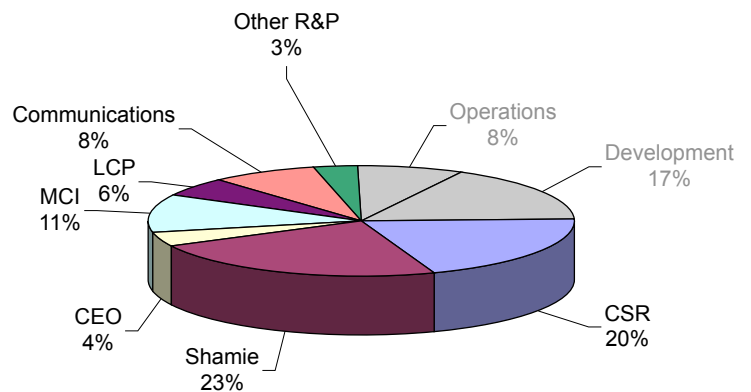
Revenues



Expenses by category



Expenses research & programs' share of total expenditures

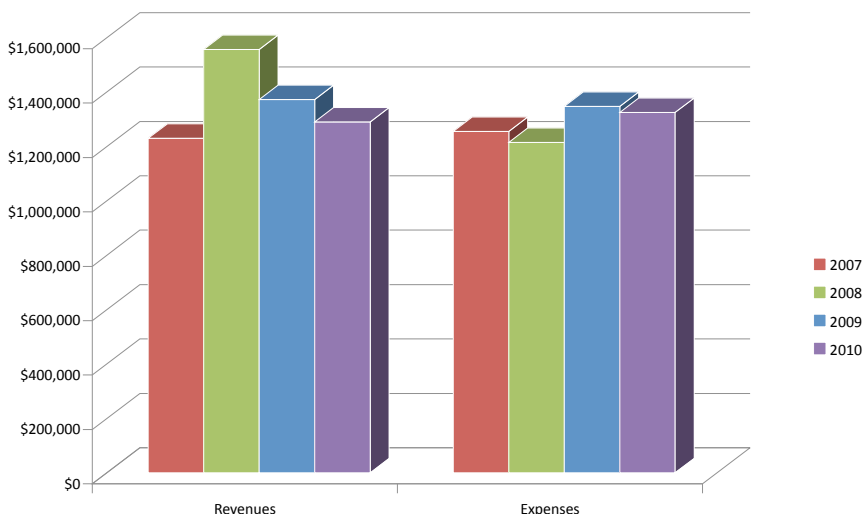




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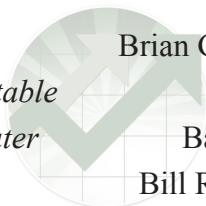
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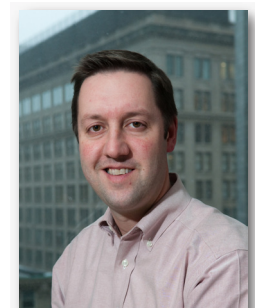
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