

2011 Annual Report

# FOCUSED PURPOSE

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# GROWING PRESENCE







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## 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.

### DIRECTORS

William B. Tyler  
*Chairman*

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Beth Myers

Mark Rickabaugh

Patrick Wilmerding

Jim Stergios  
*Executive Director*

### HONORARY DIRECTORS

Emmy Lou Hewitt

Edna Shamie

Phyllis Stearns



### *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 Healthcare Solutions*

Explores market-based reforms to rein in costs and improve the quality of care in Massachusetts.



### *Center for Better Government*

Promotes competitive delivery of public services, elimination of unnecessary regulation, and a focus on core government functions. Our *Middle Cities Initiative* connects municipal officials with best practices and performance management metrics.



### *Center for Economic Opportunity*

Works to keep Massachusetts competitive by creating jobs and by reducing the cost of living and doing business.

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 BY  
THE NUMBERS



**27** *Publications*

research papers, policy briefs, and event transcripts

**311** *Media Hits*

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

**116** *Attendees*

average per Pioneer event

**28** *Events*

featuring Pioneer



## FOCUSED PURPOSE, GROWING PRESENCE

When, in 1857, the poet Oliver Wendell Holmes, Sr. proclaimed “the Boston State House” to be “the hub of the solar system,” he wasn’t simply referring to the relative height of the golden dome. He had good reasons to say so.

We played a decisive role in our nation’s founding and Constitution. New Bedford’s Frederick Douglass and Massachusetts abolitionists stood as the strongest adversaries to the scourge of slavery. Bay State reformers were already carving the path toward equal status for women. And in 1857 began the Back Bay land reclamation project, an enormous project expanding the contours of the state capital.

**“Pioneer’s job is to develop ideas and research to lead focused reform.”**

Our cultural and political preeminence was matched by innovation and leadership in manufacturing, commerce and rail transport, fisheries and maritime trade, science and higher learning. We were the hub of the universe.

Today, private investment and dynamic innovators have helped the greater Boston-Cambridge hub reclaim some of its heritage of entrepreneurial leadership.

This remarkable surge of private initiative has not, however, been matched by the quality of our government. Ask any business owner, inner city parent, doctor or unemployed citizen of this Commonwealth. Consider the unacceptable state of once great cities like Lawrence, Springfield, Holyoke, Fall River, and New Bedford.

Economic cycles play a role in this story, but far more important is the lock of the status quo—the stifling mix of statutes and regulations, taxes, fees, and unconscionable student dropout rates in our cities.

Pioneer is keenly aware of our government’s shortcomings. That’s why we focus on high quality school options, affordable healthcare, transparent and

effective government, a vibrant business climate, and elevating the civic discourse to face these challenges with unflinching candor.

Pioneer’s job is to develop ideas and research to lead focused reform. With the heightened focus of our 2010 Strategic Plan comes greater success. In 2011, we drove the debate on the expansion of charter schools, collective bargaining reform, the freeze placed on unemployment insurance, and pension reform.

The tangible impact is: 4,000 more students with access to 16 high-performing charter schools, \$100 million saved by localities, \$600 million saved by businesses, and a \$5 billion reduction in the unfunded pension liability.

As we work toward key policy goals, we are building institutional strength. In the past four years, we have doubled our Membership; and at the time of this report, we have completed a \$1 million capital campaign in memory of our visionary founder, Lovett C. “Pete” Peters.

We are deeply indebted to you, our supporters, for your generous contributions of time and treasure. Aiming to become the hub of our solar system may not be a realistic goal, but without your focus on freedom and prosperity in Massachusetts, our accomplishments would not be possible. We are thankful for your personal commitment to Pioneer.





## PETERS MEMORIAL FUND

If ever an individual understood the importance of focus, it was Pete Peters. The intelligence and purpose he brought to his private endeavors accomplished great things. At the youthful age of 75, Pete and Ruth Peters refocused their efforts on philanthropy that advanced school innovation and parental choice across America.

In his much-loved home in Massachusetts, Pete convinced a core group of leaders that a highly focused, data-driven institute could change the conventional wisdoms about public policy in Massachusetts, especially in education.



Pete touched many lives throughout the country. We thank friends in and outside Massachusetts who have generously honored the memory of Pete and Ruth. At the time of this publication, your generous remembrances have made it possible to dedicate a total of \$1,050,000 to two important purposes—

completing the *Raise the House that Pete Built!* effort and creating the Peters Fellowships. These twin initiatives will, respectively, give Pioneer a permanent home in downtown Boston and draw young talent to Pioneer. We are inspired to stand on the shoulders of a giant. You have honored us further by entrusting us with his legacy.

### CORNERSTONE CIRCLE (\$50,000+)

Wesley Eaton	Hillsdale College
Ray Stata	Sidney A. Swensrud Foundation
Kingman Webster	Walton Family Foundation
Lovett & Ruth Peters Foundation	

### FOUNDERS CIRCLE (\$25,000+)

George Lovejoy	Polly Townsend
C. Bruce Johnstone	William Tyler
Albert Merck	The Clinton H. & Wilma T. Shattuck Charitable Trust
Mark Rickabaugh	

### CHAIRMAN'S CIRCLE (\$10,000+)

David Evans	William Hoskins
M. Dozier Gardner	Alfred Houston

### DIRECTOR'S CIRCLE (\$5,000+)

Nancy Coolidge	H. Bradlee Perry
Stephen Fantone	Ruth Peters-Stephenson
Kerry Healey	Diane Schmalensee
Ellen Herzfelder	James Stergios
Charles Hewitt	Monte Wallace
Lucile Hicks	Patrick Wilmerding
James Knott	Alice Willard Dorr Foundation
Alan Morse	L.S. Starrett Company
Beth Myers	

### BENEFACTORS (UP TO \$2,500)

Robert Beal	Sandra Moose
Cornelius Chapman	James Morgan
Melvin Clouse	Kit Nichols
Edwin Feulner	Regina Pyle
James Fitzgibbons	Paul Russell
Michele Hanss	E. Kent Swift
Steven Hoch	Anchor Capital Advisors, LLC
Robert Lawrence	
Stephen Mead	



## HIGH-QUALITY CHOICES, HIGH-QUALITY ACADEMICS

In 2011, Pioneer continued to raise its profile in Massachusetts and nationally as a savvy and energetic advocate for school choice, high-quality academic content, and school accountability.

### CHOICE AND COMPETITION

#### *A Menu of Public School Options*

The Center for School Reform advances a portfolio of public school choice options—charter schools, autonomous vocational-technical schools, inter-district choice like METCO, and digital learning. Achievement data demonstrate that students excel with greater numbers of academically rigorous and proven school choice programs. The data also show that through education tax credit offerings more children could take advantage of affordable, excellent private and parochial schools.

In 2010, Pioneer led a campaign to pass legislation, *An Act Relative to the Achievement Gap*, which

to include a provision for virtual schools as part of education reform legislation. Later that year, the state's department of education promulgated poorly crafted regulations that restrict the ability to expand digital learning in Massachusetts and, further, do not sufficiently ensure accountability for results.

Pioneer has urged lawmakers to remove those obstacles, and has waged a campaign to raise public awareness of how Massachusetts can fully exploit digital learning and build off of successful initiatives in other states. The Institute drew high-profile digital learning innovators and advocates such as Sal Khan, Founder of Khan Academy, Julie Young, CEO of Florida Virtual Schools, and Paul Peterson, Director of Harvard's Program on Education Policy and Governance to share their success stories and findings. Moving forward, Pioneer will continue to advance digital options in tandem with a strong focus on accountability and improvements in student performance.



**“Parents, and especially mothers, even in the most dire circumstances, know what’s right for their child—and they want a better future for their child.”**

– Former D.C. Mayor Anthony Williams

opened access to charter schools for an additional 27,000 Massachusetts students. In a series of media appearances, Pioneer urged education policymakers to fulfill the legislation's intent by approving an increased number of charter schools after many years of authorizing only one or two. In 2011, the Board of Elementary and Secondary Education approved 16 new charters—the largest expansion in a decade, pushing the total from 63 to 79.

In addition to the important role played by charter schools as an alternative to traditional school districts, Pioneer recognizes that virtual schools have helped hundreds of thousands of children learn at their own pace. In 2010, Pioneer worked with state lawmakers

#### *Private School Options*

In addition to public school choice, Pioneer also supports increased access to private and parochial schools. Pioneer views education tax credit scholarship programs for private and parochial school tuition as the most viable path to private school choice in Massachusetts. Two 19<sup>th</sup> century amendments to Massachusetts' Constitution currently prevent disbursement of state funds and local tax revenues to parochial schools. In recent years, Pioneer has worked to raise public awareness about these legal and political barriers to school choice, and about successful implementation of tax credit programs in other states.





In October, Pioneer co-sponsored a forum with the Black Alliance for Educational Options (BAEO), Democrats for Education Reform (DFER), and the Program on Education Policy and Governance (PEPG) at Harvard University entitled “School Choice Models and Public School Reform.” Introduced by Pioneer Board member and former Massachusetts Lt. Governor Kerry Healey, former Washington D.C. Mayor Anthony Williams described his nationally recognized efforts to expand educational opportunities in the nation’s capital and shared his concerns about our institutions’ failure to embrace innovative thinking on education reform.

which highlighted the demand among Boston’s poor, minority, and immigrant families for the high-quality, values-based instruction and safe learning environment that many parochial schools provide at a substantially lower cost than district counterparts. The report also demonstrated that the Archdiocese’s schools outperform their district, state and national peers on standardized testing, and report high rates of graduation and college attendance.

At the event, Ambassador Flynn called on Massachusetts lawmakers to repeal the state’s two Know-Nothing or Anti-Aid Amendments, or at least



**“We are undermining the underpinnings of who we are by paying too little attention to the role of the liberal arts in developing the nation.”**

**– Gerard Robinson, Florida Secretary of Education**

At the forum, Harvard Graduate School of Education Professor Martin West presented Pioneer research on Rhode Island’s education tax credit program, which provides low-income students scholarships to attend private and parochial schools. Paul Peterson, PEPG Director, moderated a distinguished panel representing diverse viewpoints on school choice and school reform, including Revere Superintendent Paul Dakin, Tom Gosnell, President of the Massachusetts chapter of the American Federation of Teachers, Alan Safran of MATCH charter schools, and Seth Andrews of Democracy Prep charter schools.

During the week of St. Patrick’s Day, in partnership with the BAEO, Parents Alliance for Catholic Education, the Becket Fund for Religious Liberty, and PEPG, Pioneer held “Dumping the Know-Nothing Amendments: Church, State, and School Reform,” an event featuring Raymond Flynn, former US Ambassador to the Vatican and Mayor of Boston.

The event marked the release of the report, *“Be Not Afraid”: A History of Catholic Schooling in Massachusetts,*

to enact education tax credit legislation allowing for donations to scholarship granting organizations that help low-income students attend private schools.

Professor Patrick Wolf, 21<sup>st</sup> Century Endowed Chair in School Choice, University of Arkansas, also presented his findings on the demand for parochial schools across the country, and the benefits of school choice. A roundtable discussion on school choice options featured panelists Dr. William McKersie, Associate Superintendent for Academic Excellence, Archdiocese of Boston, Catholic Schools; Professor Charles Glenn, Boston University School of Education; Dr. Roy Belson, Superintendent, Medford Public Schools; and Norma Shapiro, American Civil Liberties Union of Massachusetts.

Pioneer op-eds on the Know-Nothing Amendments and tax credit programs were published in newspapers across the state, and Pioneer’s Jamie Gass appeared with Ambassador Flynn on WRKO’s Tom & Todd and WBZ’s Nightside with Dan Rea.



### ACADEMIC STANDARDS AND THE PURPOSE OF K-12 EDUCATION

Pioneer has long advanced high-quality state academic standards, understanding that the purpose of education for John Adams, Horace Mann and the architects of the Bay State’s landmark 1993 Education Reform Act was not only to prepare the young for labor market needs but also to prepare them for full participation in our democratic institutions through the liberal arts. With this in mind, the Institute has supported full

Pioneer published a transcript, *Lessons for Education Policy Makers*, of recommendations offered by Professor Hirsch during a guest lecture to an education policy class taught by President Birmingham. Hirsch expressed concern about the shift from verbal and fact-based instruction in favor of a “how-to” approach that replaces rigorous academics with hands-on activities. He called for a return to a defined, knowledge-based, grade-by-grade curriculum as the most reliable way to close achievement gaps and ensure educational opportunity for all schoolchildren. Hirsch emphasized verbal proficiency



**“[By the mid-20th century], the idea of liberal arts education preparing young people for engaged citizenship gave way to a narrower conception focused on workforce development.”**

– former State Senate President Tom Birmingham

implementation of the 1993 landmark education law and high-quality U.S. history instruction by adding a related MCAS graduation requirement; and it has opposed both the introduction of “soft” skills into our state standards and the adoption of national K-12 standards and testing.

In March, with DFER, PEPG and BAEO, the Concord Review, and the Core Knowledge Foundation, Pioneer co-sponsored “The Liberal Arts and Closing Achievement Gaps,” an event featuring former Virginia Secretary of Education Gerard Robinson and Tom Birmingham, Senior Counsel at Edwards Wildman Palmer LLP, former President of the Massachusetts Senate, and co-author of the 1993 Massachusetts Education Reform Act.

Birmingham and Robinson advocated for the liberal arts tradition as a way to bridge race- and class-based achievement gaps and warned against diluting K-12 education with softer “how to” skills and less academic-

and solid language and reading instruction in grades pre-K-3. Pioneer published opinion pieces in the *New Bedford Standard Times* and *MetroWest Daily News* calling attention to the Obama administration’s reprising of efforts to shift the focus of American public education from academics to workforce development.

### *Fighting Nationalized Education Standards*

Pioneer Institute led the campaign to oppose adoption of national standards, making the case in a series of reports that the federal version contains weaker content in both ELA and math. These reports were authored by curriculum experts R. James Milgram, emeritus professor of mathematics at Stanford University, Sandra Stotsky, former Massachusetts Board of Education member and University of Arkansas Professor, and Ze’ev Wurman, a Silicon Valley executive who helped develop California’s education standards and assessments.



**“The anti-curriculum attitude has been held especially fiercely for preschool, kindergarten and first grade – just the time when the development of knowledge and vocabulary is of greatest importance.”**

– E.D. Hirsch, Jr., Emeritus Professor, University of Virginia

centered approaches to education. Charles Barone, Director of Federal Policy at DFER, moderated a roundtable discussion with E.D. Hirsch, Jr., Chairman and Founder of the Core Knowledge Foundation, Monty Neill of Fair Test, and Tony Wagner of the Harvard Graduate School of Education.

Pioneer’s work received widespread coverage, in *The Wall Street Journal*, *The New York Times*, *Business Week*, *Education Week*, *The Economist*, and print, radio, and television outlets throughout New England. Though Massachusetts has officially adopted the

national standards, it remains an open question as to whether they will survive upcoming debates in Congress and implementation. Pioneer submitted testimony on a Statehouse bill to prohibit implementation of national standards and assessments.

Pioneer has led the nationwide debate on K-12 academic standards. Jim Stergios delivered testimony before the Texas House of Representatives on the state's need to retain sovereignty over education policy. Texas—one of the country's largest textbook purchasers—has long opposed national standards, and recently withdrew from the Council of Chief State School Officers, a key national standards proponent.

Jim and Jamie joined top education thinkers and practitioners co-signing the K-12 *Innovation Anti-Manifesto* opposing the initiative to develop a national curriculum and assessment system.

In July, Pioneer Institute and the Heritage Foundation co-sponsored the D.C. policy event “National Standards and Tests: An Unprecedented Federal Overreach.” This event focused on the legal aspects of the federal government's growing role in K-12 education at the expense of state and local autonomy, and with no evident improvement in student achievement. Lindsey Burke, Heritage Senior Policy Analyst, served as master of ceremonies for the event, which featured opening remarks by Robert Scott, Texas Commissioner of Education. The panel discussion, which Jim moderated, included Pioneer authors Sandra Stotsky, Ze'ev Wurman, Theodor Rebarber, CEO of AccountabilityWorks, and Williamson Evers, Research Fellow at the Hoover Institution.

Finally, in August Jim led a panel discussion on national standards at a Harvard education conference entitled “Learning from the International Experience: Lifting U.S. Students to World Class Levels of Performance.”

With the national political campaign season upon us, this issue is likely to receive increased attention in 2012. Pioneer is well-positioned to continue to play an influential role going forward.



### LOVETT C. PETERS LECTURE

In November 2011, we celebrated the 14th 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.

**“Instead of holding fixed the amount of time you have to learn something and the variable is how well you learn it, why don't we hold fixed the standard that every student should master the concept, and the variable is when and how long they get to spend learning it?”**

**– Sal Khan, Khan Academy**

Our keynote speaker was education entrepreneur Sal Khan, Founder of Khan Academy, a free online education platform boasting 2,800 popular instructional videos on challenging subjects, viewed more than 90 million times all over the world. Khan described his program's remarkable growth, and how technology is making the classroom more engaging and interactive especially for struggling students. In transforming the learning experience for millions of children, Khan Academy is also changing the way we think about education.



## INNOVATION & AFFORDABILITY THROUGH MARKETS

2011 is the year that Pioneer’s health care research came into its own. Starting in 2006, the Institute laid the foundation for sustained, serious engagement in health care policy by raising a modest endowment, creating a strong advisory board, and hiring a full-time staff member and a widely respected senior fellow in health care policy. Our goal was to build a program that can compete with all other major players on state (and related national) health care issues, bringing Pioneer’s brand of data-driven research and savvy marketing.

In accordance with our 2010 Strategic Plan, and in recognition of our progress, we are pleased to announce the move from the formative “Health Care Initiative” to the creation of our “Center for Healthcare Solutions.”

The Center started 2011 by releasing *Fixing the Massachusetts Health Exchange*, offering seven key recommendations to improve the Commonwealth Health Insurance Connector Authority and strengthen its long-term sustainability. The research was the

Archambault testified on Beacon Hill to express deep reservations about the Governor’s current bill, which relies too heavily on the discretion of regulators and state officials to create “innovative” solutions to unyielding health care spending.

Finally, in response to health insurance costs rising 15 percent annually over the past five years for small businesses, Pioneer released *Business Solutions to the Health Care Crunch*, which introduced business leaders to some of the private sector’s most creative approaches to insurance plan design. The report shared proven strategies to engage consumers in health care decision-making and to control spending.

Throughout 2011, Pioneer expanded its already robust local and regional media coverage to outlets ranging from national and international (the *PBS NewsHour* and the *Economist*) to the regional (the *New Hampshire Union Leader*), and geographically from the *Baltimore Sun* to the *Anchorage Daily News*.

**“The Commonwealth doesn’t have a cost problem, we have a spending problem. A cost problem suggests you should set prices. Price setting simply leads to price shifting not better care...”**

– Josh Archambault, *Testimony to Joint Committee on Healthcare Financing*

culmination of Pioneer’s 2010 four-part report card series on the Massachusetts health reform. Many states are looking to Massachusetts, the first to establish an exchange, as they struggle to meet the federal law’s 2014 deadline for implementing their own exchanges.

On the issue of skyrocketing health care costs, Pioneer delved into the medical malpractice reform debate, releasing *Innovative Medical Liability Reform: Traditional and Non-Traditional Methods*. In addition, as the Legislature weighs payment reform legislation, Pioneer’s Director of Health Care Policy Josh





*Kristen Lepore, Ashley Stolba and Lauren Peters*

### HEWITT HEALTH CARE LECTURE

In memory of Pioneer's late Chairman, Charles "Colby" Hewitt, Jr., Pioneer's annual Hewitt Health Care Lecture assembles medical professionals, researchers, and policymakers for a timely and lively discussion of health care topics affecting the entire nation. Pioneer's 2011 Hewitt Health Care Lecture was the most engaging and well-attended gathering in the program's history.

This year's Hewitt lecture assembled almost 200 business and community leaders for a spirited exchange on "The Budgetary Impact of Federal Health Care Reform," between two of the



*Tim Murphy, Douglas Holtz-Eakin and Jim Stergios*

country's most respected health care policy experts: Dr. Douglas Holtz-Eakin, former director of the Congressional Budget Office and advisor to 2008 presidential candidate John McCain, and Dr. Jonathan Gruber, MIT economics professor and advisor to President Obama. The debate was moderated by Charles Baker, 2010 Massachusetts gubernatorial candidate and former Harvard Pilgrim Health Care CEO.



*Bill and Bette Hoskins*



**"It is the single most fiscally responsible piece of legislation in the last 20 years, not irresponsible, as long as Congress can keep its promises."**

**– Jonathan Gruber**



**"We won't see this [The Patient Protection and Affordable Care Act] costing a trillion dollars over ten years, it'll cost two - two and a half trillion if everybody that is eligible starts showing up in the exchanges."**

**– Douglas Holtz-Eakin**

#### 2011 HEWITT ENDOWMENT CONTRIBUTORS:

Charles Hewitt, III

K. Douglas Briggs

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



## LIMITED, EFFECTIVE & ACCOUNTABLE

In 2011 the Center for Better Government played a key role in important reforms to public employee collective bargaining, offered solutions to the state and localities to improve their budgeting and management, and advanced transparency in government.

### LIMITED: COLLECTIVE BARGAINING REFORM & STATE SPENDING

Long-term liabilities and legacy costs have been rising unabated for many years, saddling the public sector with huge costs and effectively crowding out actual services to citizens. In 2006, Pioneer was among the first to point out the threat to fiscal sustainability posed by these massive unfunded liabilities. In 2011, some public sector leaders seemed to finally get the message. In a year of great contention in states like Indiana, Wisconsin, and Rhode Island, Massachusetts was able to craft common sense solutions that curbed collective bargaining rights for local employees, but in a way that saves localities

to promote change. The 2011 reform should result in hundreds of millions in savings for municipalities.

Pioneer also assessed this year's state budget and found it lacking. We noted two major budgeting gimmicks. The first was a highly optimistic estimate of cost savings for Medicaid that would break a decade-long trend of cost increases. Pioneer was not surprised when hundreds of millions of dollars of projected savings failed to materialize. Next, we decried the extension of the pension schedule by 15 years, effectively shifting the burden from current taxpayers to taxpayers from 2026 to 2040.

We released an infographic detailing the scale and structure of the entire \$30 billion in state spending, which spans some 400 programs. Through open records requests and close analysis, the Center demonstrated that state employment had actually grown over the previous four years, despite claims to the contrary and the recession.

**“Local employees pay relatively little toward their health insurance premiums, which is why cities and towns have been trying to join the state health care system. It will save them hundreds of millions of dollars.”**

– Jim Stergios, *WBUR*, debate with Mass. Teachers Association President Paul Toner

and public employees money and, importantly, ensures higher quality health care choices for local employees.

Through numerous radio appearances, op-eds, blogs, public speaking engagements and debates, Pioneer strongly advocated for changes in the power of local unions to bargain collectively on health insurance plans. Our 2011 media campaign built on years of work aimed to bring municipal workers into the lower-cost health insurance system for state employees, developing a policy brief and decision support tools in previous years. Pioneer pushed for passage of this year's reform proposals by producing op-eds and using the media

### EFFECTIVE: 21ST-CENTURY CITIES

Municipalities are facing deep challenges during this prolonged economic downturn. In 2011, Pioneer created an innovative clearinghouse, MuniShare.org, to inspire and equip local officials and the public to push reforms.

Pioneer rolled out MuniShare.org as part of our annual Better Government Competition, to recognize and reward proposals to improve local government services and transparency. In just its first year, MuniShare.org received over 120 submissions from across the nation. The site provides municipal leaders with easy access to studies executed for and by cities and towns, offering

**“The cost of health insurance for municipal employees threatens to become an end in itself, crowding out spending on things like education and public safety.”**

– Steve Poftak, *Worcester Telegram & Gazette*

examples for addressing the most challenging issues facing local communities.

The reports cover a wide range of issues: education, the environment, finance and budgets, health & human services, housing, IT, infrastructure and transportation, parks and recreation, performance management, planning, public safety, public works, regionalization, and other topics. The 2011 MuniShare.org winners were Arlington and Brookline, Massachusetts.

Arlington’s *Looking Ahead* polled citizens on specific ways to reduce expenditures and/or raise revenues, increasing transparency in town government, and allowing residents to provide input into community decisions. Brookline’s Efficiency Initiative Committee examined the Town’s budget and identified ways to deliver services more efficiently.

Pioneer also released *A Practitioner’s Guide to Outsourcing*, which helps local officials determine if outsourcing is appropriate for their community and, if so, for which services. The study surveyed 22 Bay State communities of varying sizes to learn which services they contract out to businesses, regional governments or nonprofits.

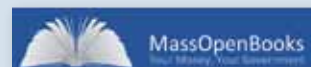
Finally, Pioneer continues to offer technical assistance on data-driven decision making through the StatNet community, of which it is a founding member, together with the Collins Center of UMass Boston and Harvard’s Rappaport Institute.

## ACCOUNTABLE: GOVERNMENT TRANSPARENCY

### *Your Government, Your Schools, Your Money*

We believe in *public* policy, which means involving citizens, and which requires access to information. Pioneer Institute is the leading voice for open and accountable government in Massachusetts. In 2011 we further expanded our transparency work by adding and updating our portfolio of web applications—and by welcoming Mary Z. Connaughton, former candidate for state auditor and longtime reform advocate, who will support this initiative. What’s new? In addition to developing MuniShare.org, in 2011 Pioneer presented a 2.0 version of our MassOpenBooks.org web tool that enhances access to state salaries, pensions, and

spending. Pioneer’s transparency work is, however, more than presenting public information. We actively unearth important internal documents to tell the backstory behind important public decisions. In 2011, our partnership with MuckRock, a public records service, has resulted in over 30 freedom of information requests digging into the state’s activities in economic development, health care reform, and the adoption of national K-12 academic standards. We are gradually releasing these documents into the public domain for use by policymakers, media, researchers, and citizens. Read our findings on Pioneer’s Blog.



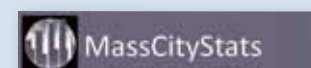
**MassOpenBooks.org:** Our 2.0 version of MassOpenBooks.org gives users access to who is receiving government contracts, state employees’ salaries and pensions. Data analysis tools help readers probe deeper, to understand how pensions have changed over time, the size of the average pension, and which employment groups earn higher or lower pensions, etc.



**Munishare.org:** A new addition to our transparency toolkit, MuniShare.org assembles in one clearinghouse the very best reports generated by local committees to reform local government.



**MassReportCards.org:** Compare one school to another, districts to districts, and choose your own metrics to do so. Through MassReportCards.org, you can access invaluable information on MCAS scores, dropout rates, and other important indicators of the quality of your children’s schools.



**MassCityStats.org:** How does one city compare to another in terms of crime prevention and public safety, fiscal management, economic growth, and education? MassCityStats.org lets you compare cities, or even compare a city against itself years ago—and, again, you get to choose the metrics important to you.



**“The end result of a Washington federal philosophy is a government that spends too much and does too little, when states can do the job better, faster, and cheaper.”**

**– Governor Rick Perry, State of Texas**



**“My administration adopted virtually every proposal that Pioneer put before us, saved half a billion to a billion dollars, and improved the quality of life in Massachusetts as well.”**

**– Former Massachusetts Governor, William Weld**

## BETTER GOVERNMENT COMPETITION

**T**he 20th Anniversary Better Government Competition called for ideas and programs that address state and local “budget busters” – those programs that are growing unsustainably and in need of dramatic change. The 2011 winners, chosen from over 200 submissions, would enact pension reform, provide health care for low-income citizens, establish a private sector job assistance program for inmates, enable remote provision of specialized health care, and streamline state licensing.

The 2011 winner was Massachusetts State Representative Will Brownsberger, whose submission, *A Proposal for State and Local Government Pension Reform*, would enroll all new public sector hires into a single system. Filed as House 2930 in the 2011-12 legislative session, the plan would insure fairness to all public employees, establish parity with private sector treatment, and reduce the fiscal burden on future generations.

**“Washington needs to free the states to innovate. We have 50 laboratories of innovation, each developing their own solutions for the unique needs of their citizens.”**

**- Governor Rick Perry, State of Texas**

The June Awards Dinner featured a keynote address by Texas Governor Rick Perry, one of the nation’s longest-serving governors, whose tax and regulatory policies are widely credited with his state’s national leadership in job creation over the past decade. His announcement of a presidential bid, one month before the awards dinner, drew strong media coverage. Distinguished speakers included former Massachusetts Governor William Weld, 2010 gubernatorial candidate Charlie Baker, and former Ambassador Christopher Egan.

We thank our eminent panel of independent judges who generously contributed time and energy to making the 2011 competition a great success: Ralph Jones, Brian Shortsleeve, Chris Sinicola, Peter Skerry, and Patrick Wilmerding.





## A MASSACHUSETTS THAT PROSPERS

Pioneer's Center for Economic Opportunity focuses on two major themes – creating jobs and improving the business climate.

Pioneer released the final two research publications in our *Massachusetts' New Economy series*, by Senior Fellow and Northeastern Professor John Friar. *Recovering from a Recession* and *The Big Shrink* draw on firm size and employment trend data in

Massachusetts's unemployment insurance system—the most generous in the nation in terms of eligibility requirements and benefit duration—is actually inhibiting job creation. Working in concert with industry partners, Pioneer produced additional research, *Creating Jobs: Reforming Unemployment Insurance in Massachusetts*. The report offered four reform proposals that could generate 10,000 new jobs and \$7.5 billion in economic growth over the next decade. Pioneer partnered with business

**“What makes for a really good venture capitalist? The right incentives. People in the private sector risk personal interest, compensation, reputation, and their own money. In state government, folks are acting like venture capitalists with *our* tax dollars.”**

– Jim Stergios, *WBUR Radio Boston*

Massachusetts from 1990 to 2007 to provide analyses and recommendations for improving the state's economic development policies. The research demonstrated the rapid decline in average firm size in Massachusetts and the key role that young firms play in creating new jobs in the first few years after a recession. These two impacts pose a challenge for policymakers – we need to create more start-up firms in order to make job gains and our initial post-recession job gains will be dependent on these start-ups, not established firms.

With a solid foundation of job creation knowledge, Pioneer made the public case, through op-eds, TV and radio appearances that the state's strategy of picking winning industries and firms was not a serious response to massive job losses. To regain the 100,000-plus jobs lost since 2001, Pioneer supports lowering business costs and eliminating red tape, regardless of industry; the Institute also supports “exchanging” billions in industry-specific tax benefits for government-favored industries for a low overall corporate income tax. Such bold moves would again make Massachusetts an economic powerhouse.

leaders to successfully freeze unemployment insurance rates, saving Massachusetts businesses \$600 million and setting the stage for future reforms that will make the system fair for workers and employers. The effort received coverage in *MSN Money*, *WBUR*, *Associated Press*, and many other media outlets.





## ENGAGING THE PUBLIC THROUGH CIVIC DISCOURSE

### *Signature and Member Events*

Pioneer holds three annual signature events: the Hewitt Health Care Lecture, the Better Government Competition Awards Dinner, and the Lovett C. Peters Lecture in Public Policy.

Named in honor of longtime Pioneer Chairman, Colby Hewitt, Jr., the Hewitt Health Care Lecture presents timely health care debates to an influential crowd of leaders in medicine, research policy, and business.

Pioneer’s famed national citizens’ ideas contest, the Better Government Competition, was established in 1991 to promote innovations and accountability in government.

The Lovett C. Peters Lecture is named in honor of our venerated founder, and is our special thank you to Pioneer Members for their generous support and commitment to a better Massachusetts. The Lecture honors individuals distinguished for the significance of their accomplishments and contributions to society, whose careers have enriched our intellectual climate and demonstrated tangible achievements.

Pioneer appreciates our Members’ commitment to Massachusetts, but we also know that our community is engaged intellectually in broader conversations that are often related to the culture, the arts, national and international issues. To nurture the intellectual interests of our Members, Pioneer holds numerous Member Breakfasts on topics of broader interest. The Breakfasts, open exclusively to Members, allow attendees in-depth exposure to presenters who are experts in their fields; and the smaller room setting of these events encourages attendees to engage in lively discussions.

Pioneer Institute promotes civic discourse and direct public engagement with policymakers at all levels. In addition to media campaigns with local, regional, and even national reach, the Institute hosts numerous events and forums that enable the public to engage directly with key players on the public policy scene. These events are well attended because of the quality of the participants, and also because of Pioneer’s long-standing practice of including opposing views in order to present a real-world debate.



*Lovett C. Peters Lecture 2011 (L-R)  
Ted Alfond, Steve & Jane Akin, Barbara Alfond*



*Lovett C. Peters Lecture 2011 (L-R)*

*Back Row: Holly Johnstone, Dr. Tomas Lichauco, Molly Downer, Paul Gordon, Jake Layton;  
Front Row: Wendy Lane, Michael Fix, Teresa Coffey-Gordon, Bruce Johnstone, Pam Layton*



*Better Government Competition Awards Ceremony 2011 (L-R)*

*Back Row: Dan Peters, Charlie Baker, Lauren Baker, Jim Stergios, Beth Myers, Governor Bill Weld;  
Front Row: Bill Edgerly, Lois Edgerly, Kathy Dietz*



*Lovett C. Peters Lecture 2011 (L-R)*

*Back Row: Chuck Hewitt, Teak Hewitt, Dozier Gardner, Dr. Paul Peterson, Sandra Gardner;  
Front Row: Preston & Susan McSwain, Bob & Nancy Anthony, Carol Peterson*

## MEMBER EVENTS

Pioneer Members enjoy exclusive invitations to quarterly and signature events, and networking opportunities with other Pioneer supporters. Through our event series we seek to engage Members on topics of broad intellectual, policy and cultural interest.

**November 10, 2010:**

**“The Fallout from the New Dodd-Frank Financial Legislation,”** co-sponsored with the Federalist Society, featuring a panel of legal, financial and consumer protection experts debating the controversial law.

**January 19, 2011:**

**“The Truth About ObamaCare,”** featuring Sally Pipes, President & CEO, and Taube Fellow in Health Care Studies at the Pacific Research Institute

**May 12, 2011:**

**“Muslims in the United States in the 21<sup>st</sup> Century,”** featuring Dr. Peter Skerry, Political Science Professor, Boston College

**June 8, 2011:**

**“Strengthening the Free Society: America’s Philanthropic Culture,”** featuring Dr. Jo Kwong, Philanthropy Roundtable

**July 29, 2011:**

**“Celebrating the Legacy of Milton Friedman,”** featuring Dr. Paul Peterson, Director of Harvard’s Program on Education Policy and Governance



## STATE AND NATIONAL MEDIA STRATEGY

Pioneer’s media presence is a significant part of its public policy mission. We aim to inform, to guide, and to deepen understanding on the central issues of our day. We work hard to get our message out across multiple media platforms: print media placements, blogs, Facebook, Twitter, TV, radio and video productions.

In 2011, with over 300 print, radio and television appearances, Pioneer has reached new heights in its media presence. A few key data points will give you a sense of our reach, as Pioneer:

- Received national and international television coverage on the BBC, PBS, MSNBC, MSN Money, and CNN.
- Appeared on local television over two dozen times, including on *Chronicle*, *WBZ-TV’s Keller@Large*, *Greater Boston*, *NECN*, *Neighborhood Network News*, *Fox 25*, *WHDH*, and *WCVB-TV*.
- Received national and international newspaper and magazine coverage in *The New York Times*, *The Economist*, *The Los Angeles Times*, *The Washington Post*, *The Washington Times*, *The Daily Beast*, *National Review*, *Governing Magazine*, *New York Post*, *National Catholic Register*, *the Providence Journal*, *the New Hampshire Union Leader*, *DesMoines Register*, *Albany Times-Union*, *Anchorage Daily News*, *Florida Times-Union*, *Atlanta Journal Constitution*, *Grand Forks (ND) Herald*, *Baltimore Sun*, and many more.



- Placed over 100 op-eds in newspapers all across the state: *The Boston Globe*, *Boston Herald*, *Attleboro Sun-Chronicle*, *Boston Business Journal*, *Cape Cod Times*, *Gloucester Times*, *The Patriot Ledger*, *the MetroWest Daily News*, *the Lowell Sun*, *Fall River Herald News*, *New Bedford Standard-Times*, *Taunton Gazette*, *Worcester Telegram & Gazette*, *Milford Daily News*, *Salem News* and many more.
- Broadened our local radio presence with appearances on *WBUR Radio Boston*, *The Emily Rooney Show*, *The Callie Crossley Show*, *WRKO’s Tom & Todd*, *WBZ’s Nightside with Dan Rea*, *Pundit Review*, *WAMC Springfield*, *WBSM New Bedford*, *WRCN*, and nationally on *KUT Austin*, and *New Hampshire NPR’s StateImpact*.
- Quoted in *Politico*, *the State House News*, *EdWeek*, *Chronicle of Higher Education*, *the Heartland Institute*, *Kaiser Health News*, *Factcheck.org*, *Salon*, *The Daily Caller* and so many more.
- Increased our Facebook fanbase 12-fold, increased our Twitter following four-fold, drew tens of thousands of views as the *Boston Globe’s* education blogger, thousands more for *Boston Magazine*, and attracted nearly half a million hits to our website.



**“The fact that Massachusetts leads the ACT exams on outcomes is confirmation of the reform path the state began in 1993. Unfortunately, Massachusetts’ path has been detoured by the Obama administration’s focus on mediocre national standards and its penchant for dictating reforms from Washington.”**

**– Jim Stergios, MSNBC TV**



**“What you have here is retired education administrators taking advantage of a loophole that allows them to continue the type of work they’ve been doing their entire career and collect retirement, which doesn’t make sense to most folks. It’s costing taxpayers millions of dollars.”**

– Steve Poftak, *Fox 25*

“How did taxpayers become major players, with a \$58 million package, on the balance sheet of Evergreen Solar? We empowered an alphabet soup of entities and funds to place highly concentrated bets on a select group of politically defined “sweet spot” industries — film production, alternative energy, and life sciences.”

– Jim Stergios, *The Boston Globe*

“So in a recession, with hundreds of thousands of people out of work, \$42 million in across-the-board pay raises is just the order of the day for state government.”

– Jim Stergios, *Fox 25*

**“Jamie Gass of the Centre for School Reform at Boston’s Pioneer Institute concedes that Mr Duncan has the power to grant waivers from NCLB, but reckons that he cannot tie the waivers to conditions that have not yet been sanctioned by Congress.”**

– *The Economist*

“Wisconsin has hit a nerve because, like Wisconsin, we’re broke. The Governor’s budget depends on pushing billions of dollars in pension payments to 2040 and onto our kids.”

– Jim Stergios, *WBUR*

“Paying for retiree health benefits, when we haven’t set aside any money for that [purpose], is impossible.”

– Jim Stergios,  
*WCVB-TV Chronicle*

“President Obama and congressional Democrats’ overhaul is based on the assumption that you can take the experiment of a state that comprises just 2 percent of the country’s population and impose it on the rest of the nation.”

– Joshua Archambault,  
*Washington Times*

“[Governor Patrick’s global payment proposal] could be just another price regulation or a redux of HMOs from the early ‘90s and we know how that turned out.”

– Joshua Archambault,  
*WCVB-TV Channel 5*

“There’s a general feeling that Massachusetts is backsliding. Whether it’s children or adults, people tend to try to meet the level of expectation put before them.”

– Jamie Gass, *The Boston Globe*

“What are you teaching students about objectivity, about independence, when the people who paid for the development of the [national] standards are also paying for the evaluation of the standards?”

– Jamie Gass,  
*Worcester Telegram & Gazette*

“Massachusetts needs a wider variety of high-quality educational options for schoolchildren of all backgrounds.”

– Jamie Gass, *The Boston Globe*

“Why, when the state is struggling to provide core services, should taxpayers pay state workers to volunteer?”

– Steve Poftak,  
*WCVB-TV News Center 5*

“Massachusetts has an entrepreneurship problem. We need to encourage and nurture new businesses, and remove obstacles to employers hiring more workers.”

– Steve Poftak,  
*MetroWest Daily News*

“The notion of a public entity using public funds to prevent someone from talking about what they’ve done with public money is preposterous.”

– Steve Poftak,  
*The Emily Rooney Show*

**“In an analysis of testing data from Massachusetts, Alison L. Fraser, author of the Pioneer Institute study of 27 regional vocational and technical education high schools in the state, found that vocational students vastly improved their passing rates on English and math standardized tests between 2001 and 2007.”**

– *New York Times*, page A1

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



In 2011, Steve Poftak became a regular contributor to *Boston Magazine’s* popular blog, *Boston Daily*.



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.



## OUR TRUE NORTH

**W**hen you contribute to Pioneer, rest assured that your support goes to focused research and savvy advocacy for limited, effective, and accountable government. Through a proven combination of academic quality research, professional and social media, policy events, and direct contact with business and political leaders, Pioneer has built a reputation for credibility and impact.

We deeply appreciate the vision of our Lead Donors, our fast-growing roster of Members, and every individual who contributes to advance our mission of world-class schools, affordable and innovative health care, an effective but limited government, and the most prosperous economy in America.

This year, we are, in addition, thankful for the heartfelt remembrance of our True North—Pete Peters. Pete’s penchant for entrepreneurship, whether during his private career or in policy, was a potent mix of principle, inspiration, and focus. We have worked hard to institutionalize his values within the Institute. We thank you for your trust and confidence in us to uphold a remarkable legacy.

We are proud to report impressive growth in our community of supporters and importantly the increased interest in our Membership program. Pioneer Membership has more than doubled in the past four years, and in 2011, we increased our membership total by 13 percent. In 2012, we are also initiating the “Next Generation Pioneers”—an effort aimed at creating a network of younger professionals from which we will grow the future leaders of this organization.

All Pioneer donors get timely updates on our latest research products, media appearances and policy forums. In addition, members and Next Generation Pioneers receive exclusive VIP invitations to breakfast lectures and signature events, and the opportunity to network with other supporters.

With our founder’s compass in hand, we have made strong strides toward improving the intellectual climate and the quality of life in Massachusetts. We greatly appreciate your generous support of our mission. This year, help us build even more momentum toward our goals by introducing your friends to Pioneer’s high-quality events and research. We are confident they will be energized by what they see and hear. And it is only by increasing our reach that we will arrive at our True North.

**“Pioneer is blessed with supporters who are courageous, principled, and deeply committed to policies that promote public accountability, education reform, and entrepreneurship.”**

– Nancy Anthony

**“Ever since I was a young boy and my mom was on the State Board of Education in New Jersey, I’ve been a fanatic about improving the quality of education wherever I am. In Massachusetts, I found that same spirit of advocacy in Pioneer. Then, lo and behold, I also discovered Pioneer’s incredible focus on limited, effective and accountable government.”**

**When you contribute to Pioneer, you get a proven combination of academic quality research, professional and social media, policy events and direct contact with business and political leaders. In other words, you get not just understanding and credibility...you also get impact.”**

– Bruce Johnstone

**“The energy and impact of Pioneer are truly inspiring. I know my dollars go to focused efforts to bring change to my home state and to improve nationally the quality of thinking on education and health care.”**

– Stephen D. Fantone

**“Pioneer events are the best bet in the Greater Boston area for timely, informative and often entertaining exchanges between a diverse group of experts on the key issues of the day.”**

– Mark Rickabaugh



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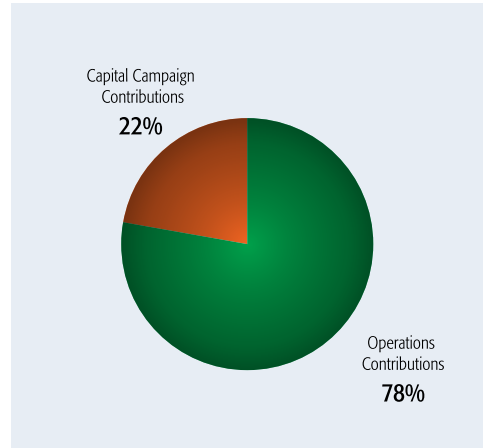
Revenue	
Unrestricted Donations	\$810,937
In-Kind Donations	22,097
Restricted Donations	920,465
Other Revenue	22,075
<b>Total Revenue</b>	<b>\$1,775,574</b>
Expenses	
Employment Costs	\$796,498
Outside Services	133,316
Research Contracts	124,669
Printing & Publishing	54,157
Distribution Costs	24,361
Events & Meetings	168,411
Staff Business Expenses	18,942
Office Operations	130,331
Internet/Website	3,055
<b>Total Expenses</b>	<b>\$1,453,740</b>
Other Income	24,672
Other Expenses	22,084
<b>Increase in Net Assets</b>	<b>\$324,422</b>

FINANCIAL POSITION

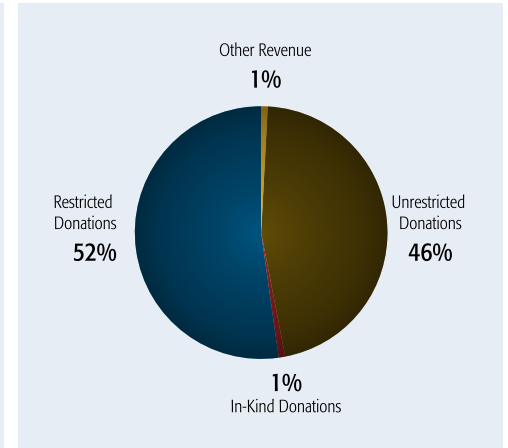
Assets	
Cash	\$654,377
Contributions Receivable	134,800
Investments	1,217,731
Fixed Assets	11,938
Long-term receivables	53,300
Other Assets	24,248
<b>Total Assets</b>	<b>\$2,096,394</b>
Liabilities & Net Assets	
Accounts Payable & Other Accrued Expenses	\$56,148
<b>Total Liabilities</b>	<b>\$56,148</b>
Net Assets	
Unrestricted Funds	\$838,120
Temporarily Restricted Funds	215,746
Permanently Restricted Funds	986,380
<b>Total Net Assets</b>	<b>2,040,246</b>
<b>Total Net Assets &amp; Equity</b>	<b>\$2,096,394</b>

REVENUES

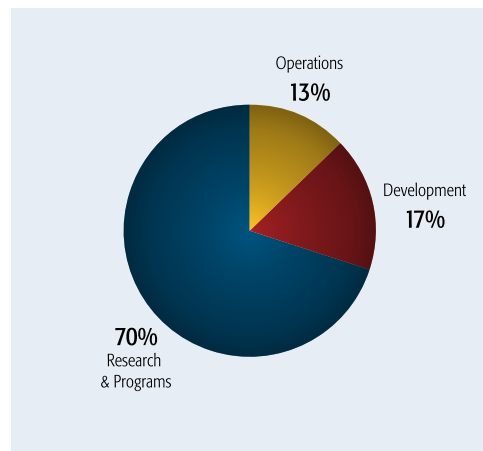
Contributions



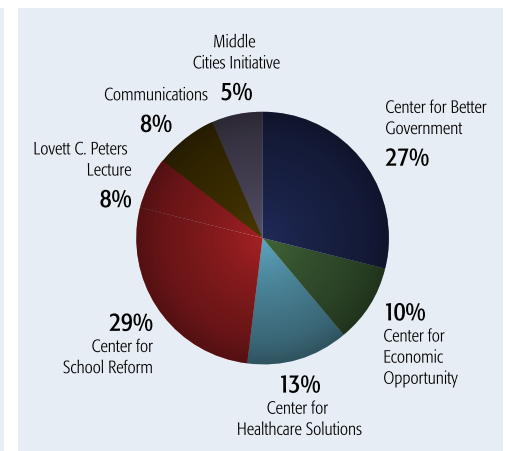
Revenues by Category



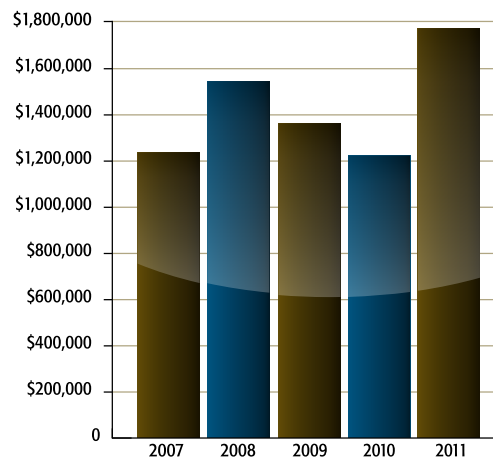
Expenses by Category



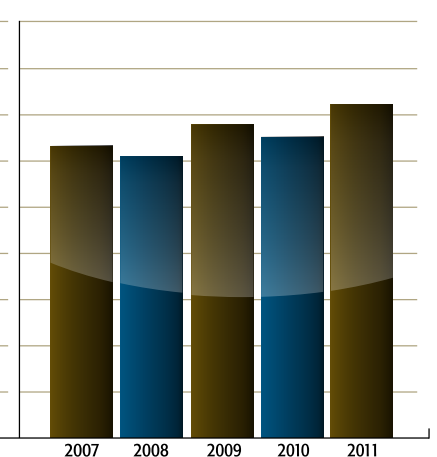
Expenses on Research & Programs



REVENUE



EXPENSES







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Pioneer Institute has provided exceptional benefits to core supporters ever since our founding in 1988. Membership at Pioneer begins with an annual gift at the \$1,000 level and includes exclusive invitations to quarterly and signature events, and networking opportunities with other Pioneer supporters.

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**Senior Fellow on Health Care**

Amy Lischko, Associate 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 academic journals. She is working on a multi-part series on the health care reform act, which will be published as a book in the Spring of 2012.



**Senior Fellow on Jobs & 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 has years of experience managing and consulting to municipal governments. He 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, and 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.

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