



2012 Annual Report





TABLE OF CONTENTS

Our Mission	2
Pioneer by the Numbers	3
Letter from the Director	4
A Permanent Foundation	5
Center for School Reform	6
Center for Healthcare Solutions	12
Hewitt Health Care Lecture	15
Center for Better Government	16
Center for Economic Opportunity	20
Events	22
The Better Government Competition	24
Lovett C. Peters Lecture	25
Media	26
Pioneer Lead Donors	28
Financials	29
Pioneer Contributors	30
Senior Fellows	34
Academic & Policy Advisory Boards	35
Staff	36



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

Seeks to increase the educational options available to families, drive system-wide administrative reform, and promote high-quality academic standards and accountability in public education.



Center for Healthcare Solutions

Explores market-based reforms to rein in the cost 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.



Center for Economic Opportunity

Keeps Massachusetts competitive by analyzing the business climate in Massachusetts and promoting thoughtful, data-driven policy recommendations.

Pioneer Institute, Inc. is a tax-exempt 501(c)3 organization. To ensure its independence, Pioneer does not accept government grants.

PIONEER BY
THE NUMBERS



22 *Publications*

research papers, policy briefs, and event transcripts

2,369 *Media Hits*

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

97 *Attendees*

average per Pioneer event

29 *Events*

featuring Pioneer



STRIVE FOR LEADERSHIP

No trait is more American than striving. And in this nation built on enterprise, Massachusetts holds a special place. The Commonwealth’s citizens pioneered global maritime trade and the country’s first railroad. More recently we helped create the electronic, computer, and biotech industries, the university-based research lab, and the model for the modern venture capital firm.

In addition to innovation, Massachusetts draws its enormous influence on the rest of the country from its constant striving for intellectual leadership. We see the best of that in the American Revolution, abolitionism and women’s suffrage; the less happy striving in Know-Nothing bigotry and our nanny-state tendencies.

A quarter-century ago, 75-year-old entrepreneur Pete Peters understood that the unique power of

“Pioneer is striving — and succeeding.”

Massachusetts’ brand positioned us to lead the nation on important policy questions. *Primus inter pares* was ensuring all kids access to great schools. Pete and his remarkable network also believed public policy innovation in health care, the business climate, and government operations could steer Massachusetts to unrivaled prosperity and freedom. Today, we strive for those same goals.

Pioneer Institute has reinvented itself several times since 1988. By 1996, it had changed from a traditional “think tank” to a “do-tank” that provided much needed expertise to the emerging charter school movement. With the 2003 spin-off of our Charter School Resource Center, we forged a powerful combination of entrepreneurial research and the strategic marketing of ideas. We outsourced most of our research, increasing productivity four-fold and making our products even timelier. Today, with national experts writing for us, the quality of our work is ever higher.

Our 2012 numbers (see previous page) prove that refocusing staff on outreach and media has given us an unrivaled ability to drive the public debate. In 2004 Pioneer held 9 events and garnered 89 media appearances; in 2012 those numbers are 29 and 2,369, hundreds of which were in national newspapers. Pioneer is striving — and succeeding.

In 2012 Pioneer delivered important policy changes, including big cost savings and improved care for 110,000 elderly poor residents, expanding e-learning opportunities, and more public charter schools. We also laid the groundwork for engagement on 2013 issues such as taxes; transportation; lifting the charter school cap entirely in underperforming school districts; expanding lower cost, high quality health care options, and unemployment insurance reform.

“We strive to make Massachusetts a true national leader.”

Devising our strategy is a Pioneer Board of Directors that is stronger than ever. A growing community of donors has provided record-setting support. We thank you for the opportunity to do this work.

While Washington remains at a standoff, Pioneer marches to the beat of a different drummer. We strive to make Massachusetts a true national leader.



John S. ... *Stephen D. Fantone*



A PERMANENT FOUNDATION

We are grateful to the many friends and families, foundations and institutions that made Pioneer's Memorial to Pete and Ruth Peters a huge success. Your gifts outpaced our goal by hundreds of thousands of dollars, an expression of respect and affection for our founding couple, allowing us to achieve the twin goals set forth in the months after Pete's death: to purchase a permanent home for Pioneer in downtown Boston and to create a Peters Fellowship to recruit and mentor new talent to the business of education and health care policy.

"RAISE THE HOUSE THAT PETE BUILT!"



That's what we called our effort to raise funds to purchase a permanent home in the financial district. Work is underway, and we are moving later this summer to 185 Devonshire Street (11th floor). We have no mortgage, and your generosity allows us to redirect \$75,000 a year to operations. Pioneer is here to

stay — to carry out our mission of improving the lives of future generations of Massachusetts residents by raising the quality of debate around key issues such as education, health care, job and business creation, and limited, effective government.

THE PETERS FELLOWS

With your support, we have raised sufficient funds to offer five annual Fellowships for current or recent graduate students with passionate interests in public policy and strong entrepreneurial and analytic abilities. The Fellows will carry the title, Ruth & Lovett Peters Fellow, and will develop a broad range of research and public policy skills.



Our first Peters Fellow was Umut Dur, a University of Texas doctoral candidate, who supported Pioneer's school choice initiatives. In this role, Umut conducted econometric modeling for Pioneer's Center for School Reform on the

financial impact of a statewide charter school cap lift, and on school voucher and tax credit scholarship programs in Massachusetts.



Our second Peters Fellow will be Katherine Apfelbaum, a Master's candidate at the University of Oxford, who will also provide project assistance to the Center for School Reform. Kate previously worked with the Foundation for Education Reform

and Accountability in Albany, NY on charter school and parent trigger research.



AIM TO BE BEST IN CLASS

For nearly two decades, Pioneer Institute has been the leading voice for education reform in Massachusetts. This year, the Institute published research, held events, and continued to expand its media presence regionally with initiatives in support of school choice, virtual learning, and U.S. History instruction. With a solid research foundation, the Institute also built a strong national presence in the media with our campaign against Common Core national education standards.

For many years, Pioneer Institute has been the leading advocate in Massachusetts for expanded school choice, actively supporting a portfolio of options that includes charter schools, vouchers, education tax credit scholarships, intra-district choice, the METCO program, vocational-technical education, and virtual learning.

For too long, Massachusetts policymakers' efforts to lift low-income children out of poor-performing district schools have focused on Boston, to the exclusion of the state's many older post-industrialized cities such as Springfield, Lowell, Lawrence, Brockton, Holyoke, Worcester and others.

Beginning in November 2011, Pioneer worked with national school choice advocates Andrew Flamang and Joe Williams of Democrats for Education Reform to launch an op-ed campaign throughout every region of the state, raising awareness of local charters' student achievement successes. Subsequent op-eds called for a more criteria-based, transparent charter selection system, and urged support for two more SABIS-run schools.

In 2012, the Commonwealth gained an opportunity to impact the lives of 13,000 schoolchildren in the



“The question for Massachusetts is why can't we apply a New Orleans-style reform to Lawrence? School performance data is every bit as appalling in Lawrence as it was in New Orleans before the natural disaster that hit the city. Do we have to wait for an act of god before we act?”

– Jim Stergios, Boston.com

BUILDING ON MASSACHUSETTS' REMARKABLE CHARTER SCHOOL SUCCESS

In February 2012, the Massachusetts Board of Elementary and Secondary Education approved four new charter schools, including a new privately-managed SABIS international academy, Lowell Collegiate Charter School, that will serve approximately 1,500 students. In the months leading up to this vote, Pioneer led an advocacy campaign in the media on behalf of high-quality, proven charter schools in Massachusetts, and calling for a more transparent, criteria-based, selection process on the part of the state Board of Elementary and Secondary Education.

City of Lawrence, when a receiver was appointed to oversee a school district that has been plagued by maladministration and chronic under-performance for over a decade.

Pioneer viewed the takeover as a “Katrina moment” for Massachusetts — a one-time opportunity for bold action akin to changes afoot since the hurricane in New Orleans. Lawrence is one of the Bay State's most beleaguered urban centers, largely populated by low-income and non-English speaking residents. The district's four-year graduation rate in 2010 was 30 points below the state average; and nearly 10 percent of students drop out each year.



To bring a sense of urgency to the plight of Lawrence schoolchildren, Pioneer hosted a policy forum in July 2012 focusing on urban school reform and school choice, featuring the newly appointed Lawrence Superintendent Jeffrey Riley.

“The Lawrence Reforms and School Choice,” event included a keynote address in which the Superintendent outlined his goals for the district, and a roundtable panel of experts and practitioners, such as Charles Glenn, Professor at the Boston University School of Education; Jose Afonso, Director of U.S. Business

to expand options for the estimated 4,400 Lawrence students on waiting lists for the city’s four charter schools. Pioneer garnered media attention from the *Lawrence Eagle Tribune*, WGBH’s “The Callie Crossley Show,” *CommonWealth Magazine*, and WRKO’s “Feinburg and McPhee.”

STRONG PUBLIC SUPPORT FOR SCHOOL CHOICE

Eighteen states, including Rhode Island and New Hampshire, currently offer education tax credit



“Wouldn’t it be revolutionary if Democrats and Republicans alike in our leadership would stand up say ‘I support the education of all of our children by any means necessary: traditional public, public charter, scholarships, tax credits, virtual schools, magnet schools – anything that’s going to help a child learn.’”

– Kevin Chavous

Development at SABIS; Beth Anderson, Executive Director of the Phoenix Charter Academy; and Tom Gosnell, President of the AFT, the union subscribed to by Lawrence teachers. The forum was co-sponsored by Democrats for Education Reform, the Program on Education Policy and Governance at Harvard’s Kennedy School of Government, and the Friedman Foundation for Educational Choice. This event, which drew over 100 high-profile attendees, brought choice advocates together with Lawrence Superintendent Riley to exchange best practices.

Recognizing that even the changes the Receiver had announced would affect at most 1,200 of the district’s 13,000 students, Pioneer called on state policymakers

scholarship programs to help low-income families gain access to higher quality, private and parochial schools, or education vouchers, under which families are given a lump sum to use toward tuition at the school of their choice. Sadly, Massachusetts is not one of them; it remains one of just two states with strict constitutional provisions, so-called anti-aid amendments — rooted in 19th-century bigotry against Irish-Catholic immigrants — which prevent public funds from being disbursed to parents to pay for private or parochial school tuition.

To bring attention to these archaic obstacles, the benefits of access to parochial and private schools, and public support for more choice, Pioneer held an event in March



featuring two of the country’s most persuasive education reform advocates, Kevin Chavous and Jay Greene. “No More Know Nothing Laws: School Choice in Massachusetts,” was co-sponsored by the Black Alliance for Educational Options, Democrats for Education Reform, The Beckett Fund for Religious Liberty, and Harvard University’s Program on Education Policy and Governance.

WRKO radio talk show host and former Speaker of the Massachusetts House of Representatives, Tom Finneran, moderated a panel discussion on school choice in the Bay State, with Tom Gosnell, American Federation of Teachers Massachusetts; Norma Shapiro of the American Civil Liberties Union; Charles Glenn, Professor, Boston University School of Education; and Scott Jensen of the Alliance for School Choice, who is the former Speaker of the Wisconsin House of Representatives.

At the event, Pioneer released two new research studies highlighting the benefits of parochial alternatives to public education, and reviewing the progress of Rhode

Island’s Corporate Scholarship Tax Credit (CSTC) program, which provides corporate aid to hundreds of students each year: *Four Models of Catholic Schooling in Massachusetts*, authored by Dr. Cara Stillings Candal of Boston University, and *Rhode Island Jewish Day Schools and Scholarship Tax Credits*, by Jason Bedrick, a former New Hampshire state legislator.



“Under the motto of, “Any Time, Any Place, Any Path, Any Pace,” Florida Virtual School is now the largest and most successful public K-12 virtual school in the world, known for its sincere focus on always putting our students at the center of every decision we make.”

– Julie Young, President and CEO of Florida Virtual School

Pioneer’s Jamie Gass and Kevin Chavous appeared on WBZ’s *Nightside with Dan Rea*, and WRKO’s *Tom & Todd Show*. In addition, Jamie Gass’ op-ed on the Anti-Aid amendments was placed in the *MetroWest Daily News*, and Kevin Chavous’ op-ed, “Poor children deserve better,” was published in the *Worcester Telegram & Gazette*.

Pioneer commissioned national pollster David Paleologos to conduct a public opinion survey of 500 likely Massachusetts voters on school choice. The results

ILLUSTRATED SIGNIFICANT PUBLIC DEMAND FOR EXPANDING SCHOOL CHOICE OPTIONS FOR ALL MASSACHUSETTS STUDENTS: 68 PERCENT SUPPORT VOUCHER PROGRAMS FOR LOW-INCOME FAMILIES, 64 PERCENT SUPPORT EDUCATION TAX CREDIT SCHOLARSHIP PROGRAMS, 70 PERCENT SUPPORT CHARTER PUBLIC SCHOOLS (35 PERCENT STRONGLY), AND 60 PERCENT SUPPORT INCREASED CHARTER SCHOOL ENROLLMENT.

EXPLORING THE NEW FRONTIER: DIGITAL LEARNING

Pioneer supports effective and accountable digital learning opportunities, and seeks to broaden support at the school district level and amend existing laws and regulations so that more online education programs are available in Massachusetts.

Pioneer supported 2010 legislation authorizing digital learning, but implementation of the law was hampered by state regulations imposing geographic restrictions. In December 2011 and March 2012, the Institute held two public forums, “Virtual Schools, Actual Learning:

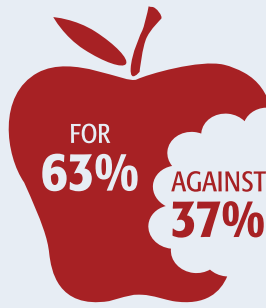
Digital Education in America,” and “Removing the Barriers: Virtual Schools and State Regulations.” Co-sponsored by Democrats for Education Reform, Florida Virtual School, and Harvard University’s Program on Education Policy and Governance, these events featured national innovators, including Julie Young of the Florida Virtual School, Susan Patrick of iNACOL, a national trade organization for digital learning, and Hannah Skandera, New Mexico Secretary of Education, who described the benefits of online education for thousands of students across the country.

Pioneer released research and published op-eds to call attention to the state’s failure to keep pace with some of the bold innovation happening across the country. Forty states other than Massachusetts have full- or part-time online digital learning programs. Ohio, Pennsylvania and Arizona have over 30,000 full-time, online

Who's For and Against Reinstating the MCAS Requirement for U.S. History?



LEGISLATORS



TEACHERS



PARENTS

students, and 22 states have over 1,000. By contrast, Massachusetts, considered a leader in public education and in information technology, had just a single virtual school, with only 500 students, and no statewide development plan.

Our two events brought attention to the Commonwealth's lack of progress on this front, and drew over 200 influential leaders in government, education, business and the non-profit sector. Key state leaders, including former Governor Jane Swift, State Senator Will Brownsberger, and State Representative Martha Walz participated in panel discussions and pledged support for expanded virtual learning programs. This work culminated in new legislation in January 2013 announcing gradual expansion to up to 10 virtual schools statewide by 2020.

REVIVING UNITED STATES HISTORY INSTRUCTION

Pioneer has always championed high academic standards that emphasize content. With the growing challenge of engaging future generations in America's social, economic and civic life, History and Civics instruction is more vital than ever. Massachusetts is one of only nine states with no requirement that students demonstrate knowledge of history or civics to graduate from high school.

Under state law, U.S. History was positioned to join English language arts, math and science as a tested content area on state assessments beginning with the class of 2012. However, in 2009, the Massachusetts Department of Education suspended MCAS testing in history and social studies.

In spring 2012, Pioneer released a public opinion poll on US history testing that was developed by national pollster David Paleologos. Results demonstrated broad

parental, teacher and legislative support for restoring a high-stakes U.S. history test as a high school graduation requirement. More than two-thirds of legislators polled believed the annual \$2.4 million cost of administering the MCAS history test "could be found" in the state budget.

The poll results were released at Pioneer's May 2012 event, "The Power of the Supreme Court: A Civics Lesson," co-sponsored by Democrats for Education Reform, Harvard University's Program on Education Policy and Governance, Core Knowledge, and *The Concord Review*. Pioneer organized a forum featuring Willard Sterne Randall, presidential historian, and Jeff Shesol, former Clinton speechwriter and author, on a topic that was timely in the run-up to the Supreme Court's landmark ruling on the federal health care law.

Thomas Birmingham, former state Senate President and chief architect of Massachusetts' 1993 education reform law, moderated a panel discussion that included veteran U.S. History teachers, a representative from the American Federation of Teachers, and a former elementary school teacher and policy expert from the Core Knowledge Foundation.

Following the event, Pioneer successfully placed op-eds disseminating the poll results in *The Boston Herald* and *The Providence Journal*, and received coverage in editorials in the *Lowell Sun* and the *Fitchburg Sentinel & Enterprise*. In 2012, Pioneer published a series of op-eds on the importance of teaching social, political and cultural history, including pieces on the 200th anniversary of the War of 1812, the 150th anniversary of the Civil War, the role of the Supreme Court, Thomas Edison and America's history of invention, and many more. These appeared in regional media outlets throughout New England.



FEDERAL OVERREACH AND THE COMMON CORE

Throughout 2012, Pioneer led a national policy dialogue bringing much-needed attention to a movement to put the federal government in control of K-12 education – with consequences every bit as dire for the country’s future as the hot-button issue of the year, ObamaCare. The prime movers behind this initiative, known as Common Core, have sidestepped parents, school boards, state legislatures, and even Congress, to impose a national curriculum and tests defining what America’s 50 million schoolchildren will learn.

Pioneer provided legislative testimony against these weaker quality national K-12 education standards in Texas, Colorado, South Carolina, Indiana, and Utah. The Institute steadily built a national coalition at the grassroots level and among the policy community, including the Heritage Foundation, the CATO institute, the American Principles Project, Stanford University’s Hoover Institution, the Pacific Research Institute,

standards contained weaker content in math and ELA than the state standards used in Massachusetts and California.

In early 2012, Pioneer published reports questioning the legality of this federally-funded and -led initiative, projecting the costs of implementation, and exposing deeper flaws in the quality of their content. The Institute collaborated with the Federalist Society, the American Principles Project, and the Pacific Research Institute, to release research co-authored by two former counsels general of the U.S. Department of Education, Robert S. Eitel and Kent D. Talbert, as well as Dr. Bill Evers of Stanford University, entitled, *The Road to a National Curriculum: The Legal Aspects of the Common Core Standards, Race to the Top, and Conditional Waivers*.

The authors found that the Obama Administration has violated three federal laws that prohibit U.S. departments or agencies from directing, supervising or controlling elementary and secondary school curricula, programs of instruction, and instructional materials.



“Most state legislatures in the country – which are responsible for 90% of K-12 education funding – are only now finding out what’s in Common Core and the strings attached. We’ve seen executive overreach at both the federal and state levels because Congress and state legislatures have been bypassed. Parents have no idea what the implications are.”

– Jamie Gass, “The Rod Arquette Show,” *KNRS*

the Federalist Society, and numerous state-level think tanks within the State Policy Network, to expose the federal overreach in K-12 education at the expense of accountability, as well as state and local control.

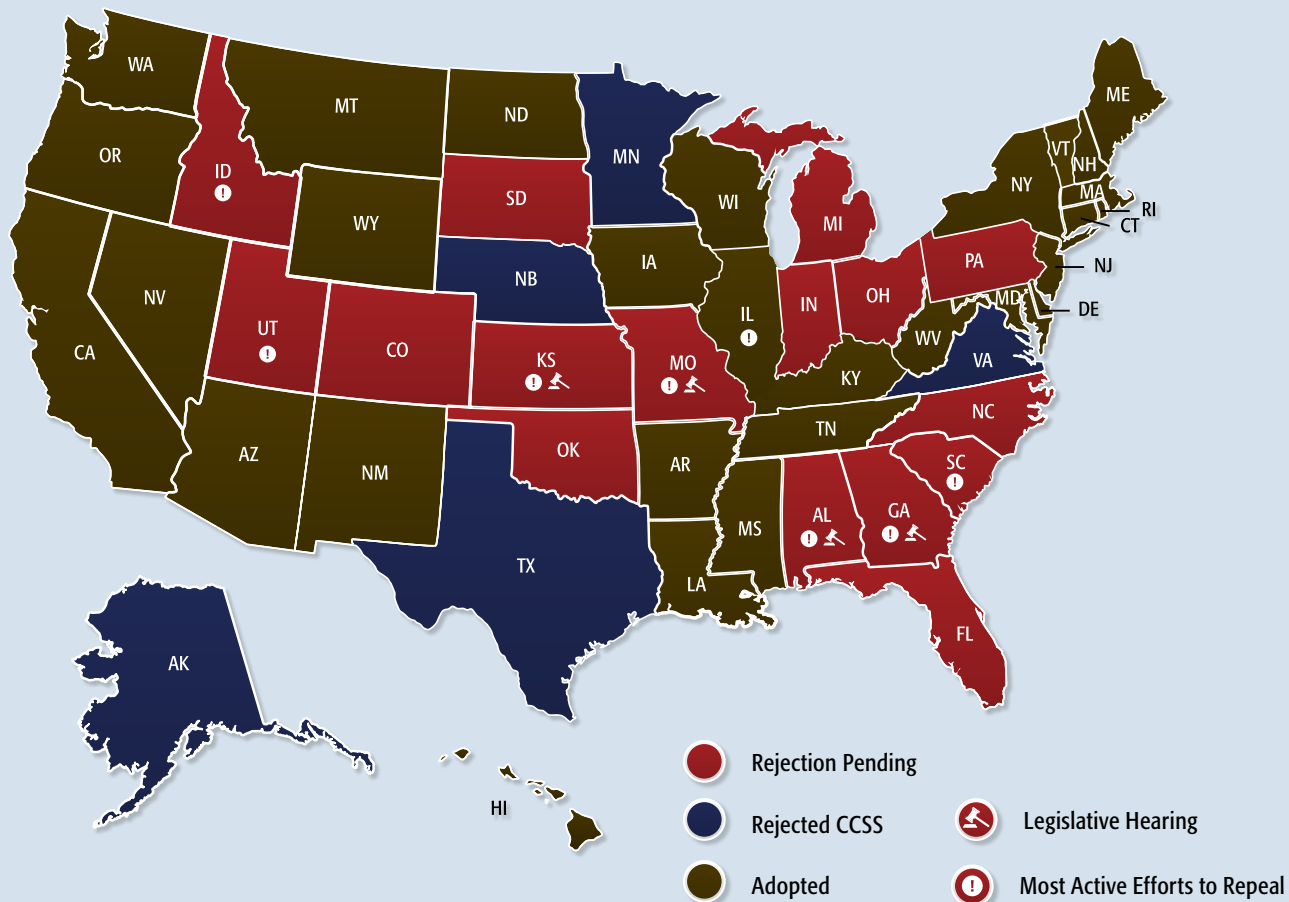
Pioneer’s national policy leadership in opposing Common Core is rooted in its first-hand knowledge that state-based reform works; it propelled Massachusetts to the top in student performance on national and international measures. Pairing high-quality research with a relentless public awareness campaign, Pioneer has raised serious questions about Common Core’s academic rigor, legality, transparency, and cost.

In 2010, Pioneer published the country’s most rigorous, in-depth analysis of the academic quality of the Common Core draft standards, authored by national academic content experts, showing that national

Pioneer was also the first organization to undertake a cost projection of Common Core implementation, partnering again with the American Principles Project and the Pacific Research Institute to commission a report, *National Cost of Aligning States and Localities to the Common Core Standards*. This study, authored by Theodor Rebarber of AccountabilityWorks, found that minimally aligning state and local educational systems to the Common Core will cost states over \$16 billion, not including additional spending for reforms to help students fully meet the new standards.

In addition to questions raised about the legality and cost of Common Core, Pioneer learned that its adoption will also mean a 60 percent reduction in the amount of classic literature Massachusetts public school students will read. Works such as Mark Twain’s *The Adventures of Huckleberry Finn* will be replaced with non-fiction or so-

Status of Common Core Adoption as of May 2013



Truth in American Education – www.truthinamericaeducation.com

called “informational texts.” Pioneer published research, *How Common Core’s ELA Standards Place College Readiness at Risk*, and held a September 2012 forum to raise public awareness about this tragic defect.

“Why Huck Finn Matters: Classic Literature in Schooling,” featured nationally recognized Mark Twain scholars, Harvard’s Jocelyn Chadwick and Pulitzer Prize and Emmy Award-winning writer and critic Ron Powers. The event was co-sponsored by the Program on Education Policy & Governance at the Harvard Kennedy School, *The Concord Review*, and the Core Knowledge Foundation.

A panel discussion included report co-authors, Emory University Professor Mark Bauerlein, University of Arkansas Professor and former Massachusetts Board of Elementary and Secondary Education member Sandra Stotsky, as well as Robert Pondiscio of the Core Knowledge Foundation, and David Steiner, Dean of the School of Education at Hunter College, as moderator.

In 2012, Pioneer’s extensive portfolio of education research on Common Core’s quality, legality, and cost was cited by nationally syndicated columnists George Will, Maggie Gallagher, CNN, *The Washington Post*, *Bloomberg*, *The Chronicle of Higher Education*, *EducationWeek*, *The Daily Caller*, *Washington Examiner*, *the Huffington Post*, *Governing*, *New York Daily News*, NPR, *The Weekly Standard*, *Heritage’s The Foundry*, *Cato@Liberty*, *the Heartlander* and more. Op-eds regularly appeared in the *Boston Herald*, *Worcester Telegram & Gazette*, *The MetroWest Daily News*, *The Lowell Sun*, *The Fitchburg Sentinel*, *The Herald News* (Fall River), *The Standard-Times* (New Bedford), *The Patriot Ledger*, and *The Providence Journal*.



NEW DIRECTIONS TO CONTAIN THE COST OF CARE

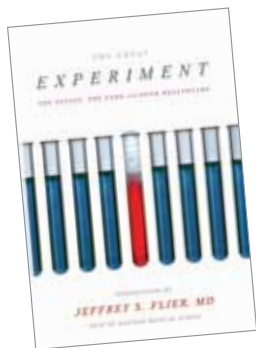
In a short span of years, Pioneer’s newly established Center for Healthcare Solutions has become a leading voice in the state and national conversations on health care cost control and payment reform. In 2012 the Institute assembled the country’s top experts to contribute to a timely blueprint for state-based alternatives to the federal health care law, convened high-profile forums on Medicaid and Medicare and other key issues, and waged a sustained campaign on behalf of patient-centered, market-driven reform in Massachusetts.

A NATIONAL REFERENDUM

Healthcare dominated the national news cycle in 2012, as the Patient Protection and Affordable Care Act (ACA), known as ObamaCare, took center stage in the

Edited and with contributions by Pioneer Health Care Policy Director, Josh Archambault, the book was co-authored by leading experts in the field, including Harvard Medical School Dean Jeffrey Flier, American Enterprise Institute’s Tom Miller, Medicaid and Medicare scholar Jim Capretta, veteran healthcare journalist Jennifer Powell, and Tufts Medical School’s Amy Lischko. Harvard Medical School Dean Jeffrey Flier wrote the introduction.

The Great Experiment includes a non-ideological appraisal of state health care exchanges, and includes in-depth coverage of the Massachusetts’ health care reform law, viewed by some as the pilot precursor for the ACA. It distinguishes Governor Romney and the Legislature’s original proposal for reform from the Massachusetts law as implemented, and reviews its successes and weaknesses. It also questions the wisdom of applying



“In a series of essays compiled by Joshua Archambault, director of Health Care Policy at the Pioneer Institute, and with a forward by Jeffrey S. Flier, M.D., the dean of Harvard Medical School, experts propose the states take the lead in reforming health care, as Massachusetts did, rather than dictate a one-size-fits-all system from dysfunctional Washington ... these are serious and doable proposals that deserve congressional consideration.”

– Nationally syndicated columnist Cal Thomas

presidential campaign and on the U.S. Supreme Court’s docket. National opinion polls reflected divided public sentiment about the 2010 federal health care law, and by the end of March, attorneys general in 26 states had challenged its constitutionality.

Recognizing the significance of this debate, Pioneer released a timely book, *The Great Experiment: The States, The Feds, and Your Healthcare*, offering a way forward for state-based, free market alternatives to the federal law.

a model designed for a single state to all fifty states, with dramatically different health care markets. The authors recommend a system of “competitive federalism,” encouraging flexibility and different approaches - the most successful of which could be adapted and improved by other states.

Pioneer launched *The Great Experiment* at a congressional briefing on Capitol Hill that drew over a hundred staff members, and mounted a public relations campaign



pairing the book with a custom-designed website to showcase its original infographs and promotional video. The Institute garnered extraordinary press attention during the months leading up to, and following, the Supreme Court's momentous ruling. As governors across the country struggle with implementation of the law, the approaches to genuine reform offered in *The Great Experiment* will continue to find a receptive audience.

Pioneer received over 800 high-impact, national television, radio, and print hits and op-ed placements, including praise from the *Wall Street Journal's* Kimberly

Locally, Pioneer appeared on WBUR (radio and online), WBZ's *Nightside with Dan Rea*, WRKO's *Tom & Todd*, Rush Radio's *Jeff Katz Show*, WGBH's *Emily Rooney Show*, *The Boston Globe*, *The Boston Herald*, *Lawrence Eagle-Tribune*, and the *Worcester Telegram & Gazette*.

COST CONTROL IN MASSACHUSETTS

Pioneer has long advocated reforms to the healthcare system that engage consumers in the decision-making process and encourage patients to reward low-cost, high-quality providers with their business.

“The Massachusetts healthcare law re-imagines and repackages so many failed top-down approaches from the past. The acronyms may have changed, but this bill looks a lot like past approaches that trusted government, not patients, to drive big, systematic changes in how we purchase healthcare.”

— Josh Archambault, *State House News Service*

Strassel, and nationally syndicated columnists Cal Thomas and Deborah Saunders. Other appearances included Fox News Channel, Fox Business Channel, CBS Evening News, nationally syndicated radio programs, *The Larry Elder Show*, *The New York Times*, *Associated Press*, *Real Clear Politics*, *The Washington Examiner*, *Politico*, *The Huffington Post*, and *Business Week*. Op-eds on the federal health law co-authored by Jim Stergios and Josh Archambault appeared in dozens of newspapers around the country, from the *Tampa Tribune* to the *Honolulu Star-Advertiser*, and they appeared on over 500 radio stations in syndication and in major markets, from New York City to San Francisco.

After years of conversation about containing health care costs, the Massachusetts Legislature took up a bill in the summer of 2012 to address this issue. Pioneer's director of health care policy, Josh Archambault, closely reviewed the 349-page statute and discovered that the supposed remedy was worse than the disease.

Promising savings of \$200 billion over 15 years, the “payment reform” bill, later known as Chapter 224 of the Acts of 2012, imposed caps on statewide health care cost increases by tying them to state growth. Josh discovered that the legislation added hundreds of millions in direct costs to the system through mandated reporting requirements, surcharges, fees and penalties — costs

Massachusetts' New Government-Directed 'Cost-Containment' Health Care Bill

25

Boards, Councils,
Task Forces, &
Commissions Created

293

Use of word
"regulation"
or "promulgate"

1890

Ordering government
action with word "Shall"

266

New Appointees

likely to be passed on to consumers. It also granted sweeping regulatory oversight to state government officials, while reducing competition and product innovation in the insurance market.

To expose these glaring defects, Pioneer led a public awareness campaign, releasing blog commentary, videos, and op-eds in *The Boston Globe*, *The Boston Herald*, and regional news outlets detailing the specific shortcomings of the statute. Pioneer received coverage in *WBUR's CommonHealth* blog, *the Associated Press*, *Real Clear Politics*, *Politico*, *State House News Service*, and many more

"The Better Government winning idea led to the integration of Medicaid and Medicare services for 110,000 individuals, improving their care and saving tens of millions of dollars annually."

outlets. Josh took to the airwaves, with appearances on WRKO, NECN, CBS' *Keller @ Large*, and WWLP in Western Massachusetts, to discuss problems with the substance of the legislation and the lack of transparency and deliberation surrounding its rushed passage.

A BETTER PATH TO REFORM

While the price-capping law represents a flawed approach to containing costs, Massachusetts did take a first step in the right direction by partnering with the

federal government to coordinate care for those eligible for both Medicare and Medicaid. These patients, known as "dual-eligibles," have for too long received uneven and uncoordinated care. Two different sets of rules often require them to schedule multiple appointments, as limits are set on billable procedures per visit. While duals comprise only 15 percent of total Medicaid beneficiaries in Massachusetts, they account for almost 40 percent of the state's \$5.5 billion cost.

Recognizing the financial incentive to address this problem, state healthcare officials reached an agreement with the federal government to better integrate the care for 110,000 of its 270,000 duals, beginning in 2013. Empirical evidence from other previous pilot programs has shown that increased use of coordinated care will lead to a 40 to 50 percent reduction in hospitalization and significant savings for those low-income, and often sicker older residents.

Pioneer awarded its 2012 Better Government Competition winning prize to the authors of this proposal, Grace Marie-Turner of the Galen Institute, and Robert Helms of AEI, and published op-eds in the *Providence Journal* and regional newspapers in Massachusetts publicizing the benefits of implementation in the Bay State. Thanks to their thought leadership, Massachusetts became the first state in the nation to gain approval for this new pilot program, and will be joining 14 other states in expanding a reform that may finally improve care for these beneficiaries and improve the state's Medicaid fiscal footing.



"When Americans start to see [the cost of the ACA] hit their checkbook and their flexible spending account, when they see it at the doctor's office, when they see lower reimbursement rates for Medicare – they're going to start to say, 'Wait a minute, this is not the \$2,500 savings that the President promised us.'"

– Josh Archambault, *Fox Business*



Chuck Hewitt, Colby and Jen Hewitt



Dick and Diane Schmalensee

HEWITT HEALTH CARE LECTURE

The Hewitt Lecture gathers leaders in medicine, research, policy, and business to hear from the leading national experts on the most timely topics in health care policy.



The Hewitt panel was moderated by Tom Scully.

The 2012 Hewitt Lecture, entitled “The Future of Medicare and Medicaid,” featured a lively, cordial and substantive debate between Dr. Don Berwick, former Administrator of the Centers for Medicare and Medicaid Services (CMS), and James Capretta, Fellow at the Ethics and Public Policy Center. Harvard Medical School Dean Jeffrey Flier delivered introductory remarks, and the event concluded with a discussion segment moderated by Tom Scully, former CMS Administrator (2001-03).

Steve and Jane Akin, Dr. Richard de Asla



“Reforming the delivery system requires that you do one thing: steer patients away from the high-cost, low-value provider to the low-cost, high-value provider. That’s difficult for CMS or Congress to do.”

– James Capretta



“The current system can’t be supported without taking important things away from people... We can’t provide the kind of equity in access in health that I would like to see if we are stuck on the system as it currently performs.”

– Don Berwick



SPENDING WISELY, UPHOLDING THE PUBLIC TRUST

In 2012, through broad outreach efforts, the Center for Better Government put its wealth of policy expertise and useful data analysis resources in the hands of more citizens, public officials, and media than ever before. Recognizing that most web content is self-generated, Pioneer has since 2007 developed a full suite of analytic tools that put information at the fingertips of our users. This year, Pioneer modeled a performance measurement system for the state's transportation agency, developed and disseminated financial management tools to all 351 Massachusetts cities and towns, and strengthened our public transparency initiative.

EFFECTIVE STATE AND LOCAL BUDGET MANAGEMENT

Cities and towns across Massachusetts face the challenge of delivering core services in the midst of state and local budget cuts, skyrocketing health care and benefits liabilities, and an anemic economic recovery. As Pioneer Executive Director Jim Stergios noted in a *Boston Globe* op-ed "Patrick's Shell Game with the budget," (February 15, 2012), state aid to local communities fell by 36 percent during the governor's first term, while the state bureaucracy grew by over 4,000 jobs.

To help cities and towns cope with the new normal, Pioneer distributed a comprehensive guide to municipal financial analysis to over 3,000 members of local finance committees across the state. *The Guide to Sound Fiscal Management for Municipalities* is intended as a resource for citizens, especially those serving on municipal finance committees, to analyze the effectiveness and efficiency of their community's spending. It includes in-depth descriptions of the budget development process, provides sources of high-quality comparative data, and identifies metrics analysts should consider in reviewing the major categories of expenditure in local budgets.

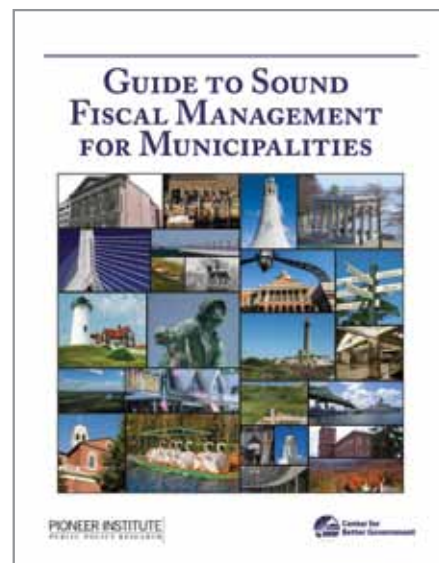
The book features contributions from municipal managers and consultants including Worcester Budget Director Jarrett Conner, Brookline Town Administrator

Sean Cronin, Stephanie Hirsch, an associate at UMass Boston's Collins Center, Pioneer Senior Fellow and waste management executive Steve Lisauskas, and City of Boston Performance Manager Devin Quirk.

Pioneer released the *Guide* with a companion utility that enables users to compare multiple cities and towns with similar characteristics across a variety of categories using available data on schools, public safety, and other municipal services, local revenues, and property taxes, debt service, unemployment rates, and other information.

The information in the Municipal Utility is presented in a user-friendly format using tables and charts to facilitate in-depth analysis. Local finance committee members can use these tools to develop short- and longer-term finance plans that are sustainable and provide quantifiable levels of quality services.

The response has been overwhelmingly positive, with multiple requests for hard copies of the guide and thousands of online visits. The Patch network of local online news outlets in over 30 Massachusetts



“Data-driven performance analysis is a desirable goal for local governments. Unfortunately, municipal managers just haven’t the time to thoughtfully assemble data and then figure out a template for reporting it. That is, until now.”

– Chelsea City Manager Jay Ash

communities showcased the utility as part of a back-to-school series comparing per-capita education spending. Pioneer is in the process of transforming this excel-based application into an interactive website, and working with municipal officials to hold regional meetings to share best practices.

CUSTOMER-FOCUSED TRANSPORTATION REFORM

Massachusetts’ problems with transportation funding, and especially the MBTA’s budget woes, are perpetually in the news. The usual response among public officials is a demand for “revenue enhancements” or stopgap funding rather than measures to develop a long-term strategy or undertake needed reforms.

Seeing at best slow progress by the Massachusetts Department of Transportation (MassDOT) in adopting performance metrics called for in the 2009 transportation reform law to communicate with the public, in 2012, Pioneer decided to do it for MassDOT. Partnering with the Northeastern University School of Engineering, the Institute developed a “Transportation Dashboard” that displays the performance of the state’s transportation system. The excel-based utility presents an array of publicly-available data in an easy-to-digest format, including the latest information on key indicators that matter to users including congestion, safety, construction management, and environmental stewardship.

Through meetings with transportation officials, online distribution of the tool, and the publication of op-eds in numerous news outlets, Pioneer pushed for more consistent communication with the public on system-wide performance, rather than on a project-by-project basis, urging state leaders to demonstrate effective management before requesting more funding.

PUBLIC ACCOUNTABILITY

Pioneer believes strongly in open and accountable government at all levels. Since 2009, the Institute further enhanced its suite of online, searchable products that help you answer your own questions on the quality of your schools, the management of your local community, state spending and pensions and the transportation system.

In 2011, Pioneer’s MassOpenBooks website caught the eye of Treasurer Steve Grossman, who had campaigned the year before on a pledge to put the “state’s checkbook online.” Pioneer welcomed the competition in support of greater transparency, and the Institute’s Research Director was invited to provide feedback on the new Open Checkbook website prior to its launch. Coverage of the Treasurer’s initiative in dozens of Massachusetts news outlets included favorable mention of Pioneer’s privately-funded version. (Psst, ours cost a total of \$20,000; the Treasurer’s almost \$2 million).

But Pioneer recognizes that competing for a 21st century audience requires going beyond hosting databases - that’s why the Institute is devoting more effort to delivering its timely, high-quality and useful information in a more digestible, user-friendly format through traditional and social media, blogs, and email distribution.

“Massachusetts has lagged behind other states in providing an acceptable level of information.”

– Jim Stergios, Pioneer Institute

In 2012, in response to popular demand, Pioneer proudly reprised an updated version of its widely acclaimed spending map of Massachusetts’ state government. The state budget itself is a listing of over 800 line items, creating the illusion that funding for each item is equal. But displaying programs visually in proportion to their spending level, by department, allows everyone, from state legislators and policy makers to citizens and taxpayers, to easily identify the state’s spending priorities; e.g., how much more is spent on certain programs, such as Medicaid, relative to education and public safety.

Visitors will find posters of the map hanging on walls throughout the State House and other public sector offices, and Pioneer has distributed hundreds to citizens



across Massachusetts. The online version features an adjustable display format, so that viewers can scroll over and zoom into each component for a close examination.

Another avenue of government oversight is Massachusetts’s Public Records Law, created to allow citizens to access important public documents, paid for by our tax dollars. In 2011, Pioneer, in partnership with MuckRock, Inc., a public records submission service, uncovered important internal documents revealing the story behind the state’s risky investment in Evergreen Solar, key decisions in the development of health care reform, and the state’s lackluster oversight of investment funds.

Pioneer’s 2012 public records reviews revealed instances of weak oversight within the Executive Office of Housing and Economic Development, which awarded a no-bid contract worth millions, without conducting a written performance evaluation; and at UMass Law School, which failed to meet many of the academic goals contained in its application, jeopardizing its ABA accreditation. Both *Massachusetts Lawyers Weekly* and the *New Bedford Standard-Times* published stories highlighting Pioneer’s analysis and called for the state’s only publicly-funded law school to become more

accountable for its performance.

In March, during “Sunshine Week,” Pioneer and MuckRock set the record straight when MassPIRG gave the Patrick Administration high marks for its supposed commitment to transparency. Pioneer published and widely distributed an original infographic, “A Cloudy Record on Massachusetts Sunlight,” showing agency response times of up to 427 days, well in excess of the law’s ten-day limit. Pioneer also released the “Administration Guide to (Avoiding) the Public Records Law,” a tongue-in-cheek compendium of public records failures exhibited by various state agencies, that also appeared in *The MetroWest Daily News*. MuckRock’s Michael Morisy discussed his work with Pioneer on WTKK’s “Jim and Margery” morning talk radio program.

In 2012, Pioneer’s Director of Administration and Finance, Mary Connaughton, began overseeing the Institute’s transparency initiatives, strengthening its partnership with MuckRock. Building on the groundwork laid by former Research Director Steve Poftak, Mary recruited investigative journalism interns to work with MuckRock and mine Pioneer’s online databases, increasing the number and scope of



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: 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.



MassAnalysis.org: The newest addition to Pioneer’s transparency toolkit, MassAnalysis.org is an interactive online database designed to help local finance committee members and active citizens compare all Massachusetts cities and towns using available data on schools, public safety, property taxes, debt service, and other categories.

Pioneer's FOIA submissions, as well as op-eds and blog commentary publicizing findings.

Mary met with regional news editors across the state, and was able to reach a much broader audience when she was invited to become a regular contributor to WBUR's new blog, *Cognoscenti*, and a featured columnist for *The MetroWest Daily News*. Her debut *Cognoscenti* post, "State House Secrets," challenged the Massachusetts Legislature's exemptions from the state's open meeting and public records laws, and recommended a full state audit.

"It would be a lot harder for legislators to smile at the camera as bills were signed if price tags dangled over their heads for voters to ponder. Establishing an independent office in Massachusetts like the CBO, to be run by the inspector general would pay for itself. Improved decision-making and accountability promote both efficiency and public trust."

– Mary Connaughton, *MetroWest Daily News*

Mary followed that up with a *MetroWest Daily News* op-ed that appeared in over 20 regional newspapers, "Why the Bay State Needs its Own CBO," calling for an independent cost projection for every legislative bill. In September, she worked with MuckRock news editor Tom Nash to uncover evidence that the Supervisor of Records, the state office charged with enforcing the public records law, was itself violating that law. Their findings appeared in a *Boston Herald* op-ed, "State undercuts open records law."

A Cloudy Record on Massachusetts Sunlight

Public records laws are an integral part of holding government accountable. Unfortunately, Massachusetts's track record leaves a lot to be desired: Simple requests can take a year or more to fulfill, search and reproduction fees climb into the thousands of dollars, and government offices claim dubious exemption, all leaving the public in the dark and denying their basic right to know.

Why Public Records Matter

In Massachusetts, public records are essential to shining light on government waste, corruption and life-threatening danger – that is, when they are available. Boston Globe used government documents to highlight a deadly trend of nurse "alarm fatigue," impacting policy that can save lives. The Pioneer Institute requested records on Massachusetts's investment in Evergreen Solar, shining light on a questionable government investment in a failed company. Sometimes records simply improve understanding how government operates.

Commonly Requested Documents:



MASSACHUSETTS LAW ALLOWS
10 DAYS
TO FULFILL A REQUEST

STATE AGENCIES AVERAGE
69 DAYS
TO FULFILL A REQUEST*

Despite repeated claims of transparency, agencies in Massachusetts have a terrible track record of actually providing these records: MuckRock users have filed 56 total requests to 36 different state agencies, and the average response time of completed requests is 69 days. That total doesn't average in outstanding requests, some of which are a year or more older, and it doesn't reflect agency tendencies to produce high fee estimates (often in the thousands or tens thousands) which often discourage requesters.

Average Response Times*

MASSACHUSETTS STATE LOTTERY
427 DAYS

UNIVERSITY OF MASSACHUSETTS
SCHOOL OF LAW
280 DAYS

EXECUTIVE OFFICE OF HOUSING AND
ECONOMIC DEVELOPMENT
228 DAYS

MASSACHUSETTS CLEAN ENERGY CENTER
102 DAYS

HUMAN RESOURCES DIVISION
97 DAYS

MASSACHUSETTS LOCAL: MOSTLY CLOUDY

\$\$\$ Many cities simply ignore valid requests, or else
ASSESS HUGE FEES

City	Average Response Time
Andover	10 Days
Beverly Hills	9 Days
Beverly	27 Days
Cambridge	33 Days
Chelsea	48 Days
Dorchester	11 Days
Woburn	15 Days

While many city and county agencies respond more quickly than state agencies, getting records is still a mix of skill, persistence and luck. Agencies will routinely invoke non-existent rules, charge excessive fees, delay responses for months or years. With weak enforcement and little training, things aren't likely to change anytime soon.

www.pioneerinstitute.org

*Response times based on MuckRock Massachusetts.com. Data from: Pioneerinstitute.org. **Data provided by MuckRockers: Michael Hesse.

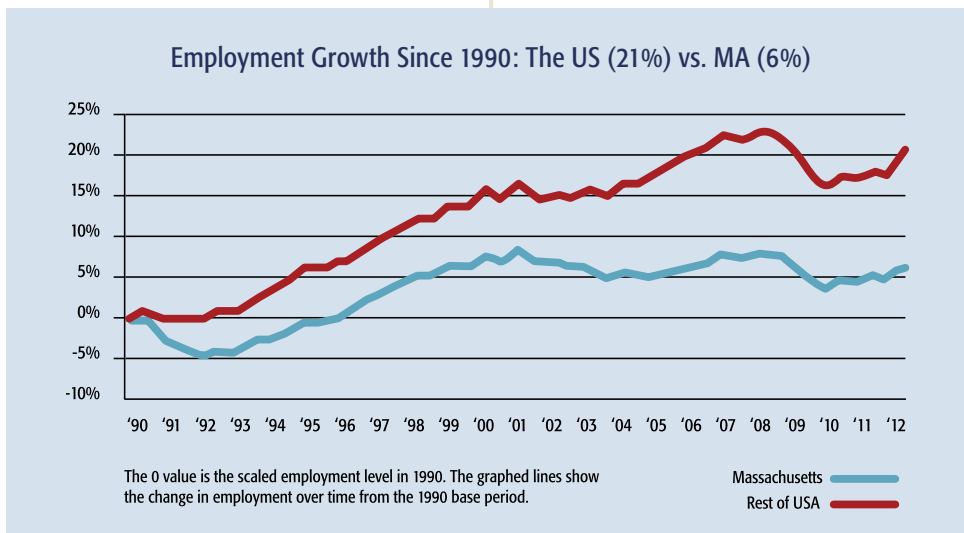


GOING FOR GROWTH

Our Center for Economic Opportunity promotes policies that will jumpstart the Commonwealth's economy and allow the talents of residents to reach fulfillment. The Center's policy priorities stem from "Measuring Up?," our highly data-driven analysis from consulting firm Global Insight on the cost of doing business in Massachusetts versus competitor states; and our 7-part "Massachusetts New Economy" series, which explored long-term trends in business formation and job creation. The challenge for Massachusetts can be summarized neatly in the following graphic.

REDIRECTING THE CONVERSATION

Pioneer praised aspects of Governor Patrick's 34-page economic growth plan, "Choosing to Compete," as a welcome update of Governor Weld's blueprint of the same name. But the Institute raised concerns about the plan's call for a 20 percent annual increase over a five-year period in "state funding of capital, mentoring and advice, including incubator and/or accelerator programs, for early stage entrepreneurs and small businesses." These recommendations are a continuation of the misguided practice of rewarding specific industries with billions in direct investment and tax benefits.



Had we grown like the rest of the U.S., we would currently have 450,000 more individuals employed in the Commonwealth of Massachusetts. That's more prosperity. That's more potential state revenue without increasing taxes.

Pioneer is focused on redirecting state policy away from picking winners and losers and, instead, toward three practical and powerful reforms: to our unemployment insurance, small business health insurance market, and the state's regulatory environment.

In a *Worcester Telegram & Gazette* op-ed, Pioneer published troubling findings about the administration's decision to invest \$58 million in a green energy company, Evergreen Solar. The company went bankrupt in 2011, shedding 800 Bay State jobs. Government documents that Pioneer uncovered indicated that the state failed to evaluate the financial viability of the company before subsidizing it, and ignored a Standard & Poor's report on its riskiness.



“A123’s bankruptcy filing is just one more piece of evidence that this a failed jobs

strategy. The government is not good at picking winners and losers, and it’s not working for Massachusetts.”

– Jim Stergios, NECN

A number of failed government-backed ventures such as Evergreen Solar, Beacon Power and A123 are examples of how ill-equipped state government is at picking winners and losers in complex, evolving markets. Importantly, even when deep subsidies “work out,” the job creation impact is small, especially in the context of the Bay State’s loss of 100,000 jobs since 2001.

Pioneer has actively supported positive elements in the “Choosing to Compete” report. The greatest opportunity in the report, we believe, is its focus on regulatory reform. The Institute has supported the administration’s effort to revise regulations by making suggestions on the regulations most in need of work and specific suggestions on how to improve them.

UNEMPLOYMENT INSURANCE

Getting tens of thousands of long-term unemployed and underemployed Massachusetts residents back to work should be a top priority. Instead of serving as venture capitalists, state leaders should focus on removing tax and regulatory barriers to growth.

Massachusetts ranks as one of the most expensive places in which to create jobs, in part due to its unemployment insurance system. Few states can match the commonwealth’s generous benefits, lenient eligibility requirements, and long collection periods. Pioneer has published research outlining specific reforms that could result in 10,000 new jobs and \$7.5 billion in economic growth over ten years; however, state leaders continue to rely on stop-gap measures.

In 2012, for the fourth year in a row, Massachusetts employers had to make another appeal to the Governor and Legislature to reverse a scheduled 31% increase in the Unemployment Insurance tax. In op-eds appearing in dozens of newspapers across the state, Pioneer called for a rate freeze, noting that the burden on businesses would rise from an annual average of \$715 per employee

to \$935, even though the fund had a \$100 million surplus. The freeze saved employers over \$500 million, but any serious job creation strategy requires long-term reforms, not last-minute fixes.

SMALL BUSINESS HEALTH INSURANCE MARKET

The health care industry is a source of employment and also innovation in sectors like medical devices. The costs for small businesses and startups, however, are enormous – and growing. Over 70 percent of costs are lifestyle-related, associated most often with cardiovascular disease, cancer, diabetes and obesity. Addressing those issues is important, as is recognition that the state legislature regulates less than half of residents’ health insurance. (The rest receive insurance from the federal sources or from larger companies regulated by the federal government.)

Pioneer’s focus has been on highlighting what businesses can do to contain benefit costs while maintaining benefit levels. In 2012, we continued to market research on businesses that have used self-insurance and other models to do just that. In addition, we have begun an effort to highlight the important role of health plans that engage consumers on cost and quality, so-called consumer-driven health plans (one of which is a health savings account).

Around the country, consumer-driven plans have proven an option that helps employers and employees hold down health care cost inflation significantly. Currently, 13 percent of the insured in the U.S. have some version of a consumer-driven plan; in Massachusetts only 3 percent. We believe consumer engagement is critical to improving health habits, holding down costs, and growing more jobs in Massachusetts.

Over the past four years, Pioneer has also been supportive of alternative ways of delivering care. One principal pathway forward to ensure that residents have access to high-quality, lower cost care is the arrival of so-called Minute Clinics. In 2012, we continued to highlight the benefits of Minute Clinics and sought to expand their presence in the state. In 2013, we will be engaging further on this issue, with a particular focus on Boston, which has thus far prohibited Minute Clinics from a presence in the city’s marketplace. We believe residents of Boston need access to these new models of basic care provision even more than the Greater Boston suburbs.



IMPROVING CIVIC DISCOURSE THROUGH LIVELY PUBLIC DEBATE

Signature and Member Events

Pioneer Institute's three annual signature events are the Hewitt Health Care Lecture, the Better Government Competition, and the Lovett C. Peters Lecture in Public Policy.

Held annually in March, the Hewitt Health Care Lecture brings together Greater Boston's most influential leaders and practitioners in medicine, research, policy, and business for timely health care debates featuring national experts in the field.

In June or September, several hundred policy makers, public officials, members of the media and business communities, and active citizens gather for the Institute's Better Government Competition Awards Ceremony, to recognize the nation's most innovative proposals to improve public services at all levels.

Each November, Pioneer hosts its annual Lovett C. Peters Lecture in Public Policy, a ceremony honoring individuals distinguished for the significance of their accomplishments and contributions to society. Named for our founder, Lovett C. "Pete" Peters, this event serves as an expression of gratitude to our core supporters

for their commitment to our mission of improving the quality of life in Massachusetts.

In addition to our marquee events, Pioneer Institute holds educational forums, free and open to the general public, throughout the year. These events provide opportunities for active citizen engagement with public officials, practitioners, and policy experts. Pioneer's ability to attract a broad range of nationally renowned speakers, and efforts to present panelists with diverse viewpoints and expertise, always ensure high attendance and vibrant debate.

Pioneer has always sought to engage our membership in intellectually stimulating discussions beyond the Institute's immediate scope. Our quarterly Members Breakfast series covers topics ranging from arts and culture, and law and society, to national and international issues. The breakfasts, open exclusively to members, offer a more intimate setting than our public forums, and attendees enjoy open interaction with our high-profile presenters.



*Lovett C. Peters Lecture 2012 (L-R):
Bruce Johnstone, Jim Stergios, and Deepak Srivastava*



*Better Government Competition Awards Dinner 2012 (L-R):
 First Row (Seated): Bill and Lucile Hicks, Bill and Anngie Tyler
 Second Row (Standing): Peter Canellos, Roger Scoville, Michael Barone, Jim Stergios, Susan and Arthur DiMartino*



*Lovett C. Peters Lecture 2012 (L-R):
 First Row (Seated): David Quade, Elizabeth Fantone, Matthew and Carol Haggerty
 Second Row (Standing): James and Lyn Taylor, Jim Stergios, Deepak Srivastava, Stephen Fantone*



*Better Government Competition Awards Dinner 2012 (L-R):
 First Row (Seated): Andrew Davis, Jason Block, Jim Hearty, Robert Keane
 Second Row (Standing): Jen Besser, Dr. Florence Bourgeois, Abbott Lawrence, Fabienne Bourgeois, Jeb Besser*

MEMBER EVENTS

Pioneer members enjoy exclusive invitations to quarterly events, which offer intellectual and cultural enrichment as well as networking opportunities with other supporters.

October 5, 2011:

“Has Canada Found Solutions to US Problems?” featuring Brian Lee Crowley, Managing Director, Macdonald-Laurier Institute for Public Policy

October 26, 2011:

“The Morality of Capitalism,” featuring Tom G. Palmer, Atlas Economic Research Foundation and Senior Fellow, Cato Institute

December 5, 2011:

“He-Said, She-Said: PACs, Political Ads & Election 2011,” featuring national political strategists Steve Grand and Linda Moore Forbes

April 24, 2012:

“The Upside-Down Constitution,” co-sponsored with the Federalist Society, featuring Michael Greve, John G. Searle Scholar, the American Enterprise Institute

May 21, 2012:

“Predicting the 2012 Elections,” featuring David Paleologos, national pollster, Director of the Suffolk University Political Research Center

In 2012, we initiated the **“Pioneer New Leaders” program**, a network of younger professionals who will become the next generation of market-oriented reformers. Pioneer New Leaders also receive exclusive VIP invitations to breakfast lectures and signature events, and the opportunity to network with Pioneer’s community of supporters



THE BETTER GOVERNMENT COMPETITION

The theme of the 21st annual Better Government Competition was to “Restore Federalism,” focusing on federal programs that could be devolved to the states in policy areas like education, healthcare, regulations, urban redevelopment, transportation, interstate commerce, banking and finance.

“Think tanks like AEI, Galen, and Pioneer have an important job to do, to keep producing careful, factual analysis of programs.”

– Robert Helms, American Enterprise Institute

The 2013 Better Government Competition attracted over 200 entries from around the country. Award winners, Grace-Marie Turner of the Galen Institute, and Robert Helms, Ph.D., of the American Enterprise Institute, called for the federal government to allow states to integrate and manage acute and long-term care benefits for the elderly indigent — that is, those eligible for both Medicaid and Medicare. Implementation of the recommendations in “Coordinating Medicare and

Medicaid to Improve Care” will improve the quality of care for millions of America’s most vulnerable citizens and save billions. The Patrick Administration has announced plans to implement this idea for 110,000 of the 270,000 eligible beneficiaries in Massachusetts.

The four runners-up identified ways to improve USAID training programs for foreign students, curb the rising cost of federal natural disaster responses, increase the transparency of public pension investments, and reduce rush-hour congestion through performance measurement.

The September 24th awards ceremony, held just six weeks before the presidential election, featured nationally syndicated political columnist Michael Barone as the Keynote speaker. He shared expert analysis on Election 2012, and its implications for the future of the American experiment.

We thank our distinguished panel of judges for their deep commitment to the Competition selection process, and to the goal of improving public services: Charles D. Baker, Jr., Stephen D. Fantone, Kenneth Johnson, John F. Moffitt, and Richard L. Schmalensee.

“The oldest, sickest, and neediest are getting the worst care and costing the most money. There are so many good ideas in the states, today blocked by tens of thousands of pages of rules and regulations.”

– Grace-Marie Turner, the Galen Institute



“The Founders continue to appeal to something deep in Americans. We have seen it in the best-selling books on the Founders, Thomas Jefferson, George Washington, Benjamin Franklin, Alexander Hamilton... Especially in this post-industrial information age, the 70-year old ideas of Progressives and New Dealers sound tinny and out of date while the 200-plus year old vision of the Founding Fathers rings like a silver spoon striking a crystal goblet.”

– Michael Barone,
nationally syndicated political columnist



LOVETT C. PETERS LECTURE

On November 13th, 2012, Pioneer's closest friends and supporters gathered for the 15th annual Lovett C. Peters Lecture in Public Policy, an event that, in the spirit of Pioneer Institute's founder, recognizes individuals who are distinguished by their enrichment of the intellectual climate, and their tangible achievements and contributions to society.

The 2012 Peters Lecturer was just such a thought leader and innovator: Dr. Deepak Srivastava, Director of the Roddenberry Center for Stem Cell Biology and Medicine at the California-based Gladstone Institutes.

“Our new approach of regenerating an organ from within, and harnessing cells already there for new potential uses, may be a new paradigm for regenerating not only heart muscle but also many other organs... This new technology can advance personalized medicine by testing drugs on your own cells and determining who would benefit and who wouldn't.”

– Deepak Srivastava, Gladstone Institutes

Dr. Srivastava is an incomparable medical researcher, whose team has made extraordinary advances with adult stem cells, identifying ways to alter them to regenerate complex organs in test animals. Srivastava's work in regenerative medicine is focused on understanding the causes of heart disease to treat human cardiac disorders. His pioneering research may help doctors restore heart attack damage by transforming scar tissue into beating heart muscle.

Like past Lecturers, such as virtual learning innovator Sal Khan, Newark Mayor Cory Booker, X-Prize Founder Peter Diamandis, and so many others before them, Dr. Srivastava is just such an individual of vision who is leaving a mark on our world, in real time, developing new groundbreaking treatments, speeding to market and rendering more efficacious future drugs, and answering important ethical questions.



“We can now imagine a world where we may be able to restore the ability of a father to run and pick up and play with his daughter, of a little boy to open his eyes and see the wonders of our wonderful world, and of a mother to look her grown son in the eyes and actually remember his name.”

**– Deepak Srivastava,
Gladstone Institutes**



REACHING STATE AND NATIONAL AUDIENCES

Media presence is a key measure of a think tank’s influence and impact. Since 1988, Pioneer has been a respected resource for the print, radio and television media, increasing the Institute’s credibility and influence with elected officials and the public.

Pioneer Institute has become the go-to source for commentary on the news of the day. Our policy analysts are regularly cited in regional, state and national outlets. In 2012, during the Supreme Court’s health care ruling, Pioneer Executive Director Jim Stergios and Healthcare Policy Director Josh Archambault appeared on over 300 talk radio stations across the country, were cited

were published in *City Journal*, and Pioneer was cited in CNN, *The Washington Examiner*, *Weekly Standard*, *Washington Post*, *Bloomberg*, *Daily Caller*, *the Chronicle of Higher Education*, *EducationWeek*, and many more national outlets on this topic.

At the state and local level, Pioneer op-eds were published in *The Boston Globe*, *The Boston Herald*, *The Worcester Telegram & Gazette*, the *Boston Business Journal*, the *Providence Journal*, *The Lowell Sun*, the *Fall River Herald News*, *Patriot Ledger*, and many more local and regional newspapers – more than any other think tank in New England. We send those op-eds to the inboxes of policymakers, business leaders and other media outlets



“A refundable federal tax credit gets us closer to universal coverage than ObamaCare does. It would allow the 50 million uninsured to be have the money to go out and purchase their own insurance in a competitive market.”

– Josh Archambault, *Fox News*

in nationally syndicated columns by Cal Thomas and Debra Saunders, and were featured in *The Wall Street Journal*, *The New York Times*, *Forbes*, *The Daily Caller*, *Associated Press*, *BusinessWeek*, *Real Clear Politics*, *Politico*, *The Hill*, *Fox Business News*, and *Fox News*. Their opinion pieces appeared in McClatchy and other major market newspapers, reaching tens of millions of readers across the country.

As more states began to raise questions about the Common Core national education standards, Pioneer’s research on their quality, legality and cost was featured in nationally syndicated columns by George Will and Maggie Gallagher which appeared in over 100 newspapers across the US. Pioneer Education Policy Director Jamie Gass and Senior Fellow Charles Chieppo

to ensure that they receive them. Pioneer appeared on NECN, Fox 25, WCVB, WBUR’s RadioBoston, WBZ’s “Nightside with Dan Rea,” WGBH’s “Callie Crossley Show,” “The Emily Rooney Show,” and several other Greater Boston TV and radio programs. In addition, Mary Connaughton was invited to become a regular contributor to WBUR’s Cognoscenti blog, and the *MetroWest* Daily News; and Josh Archambault was invited to become a regular contributor to *Forbes.com*.

In 2012, with nearly 2,400 print, radio and television appearances, Pioneer’s media presence grew by over 800%. We increased our social media output significantly, amplifying our message through a steady stream of content on Facebook, Twitter, YouTube, blogs, and other online platforms. In 2012, Pioneer doubled its following on both Facebook and Twitter.

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.





“Massachusetts policymakers used to focus on having all students rise and making sure sub-groups such as African Americans and Hispanics rise faster. Right now, what we’re seeing is a dumbing down of our standards. Maybe we can bridge that gap, but we’re lowering the high end to do it.”

– Jim Stergios, *NECN*

“Jim Stergios, executive director of the Pioneer Institute... called the Supreme Court’s health care ruling a “lose-lose for everyone. The fact that this decision was made in essence by a single justice highlights the need for real solutions that can gain broad consensus,” he said.”

– *Associated Press*

“In cities like Lawrence, where there are deep pockets of chronic underperformance, we think it’s a moral imperative to rescue children from failing schools. That’s why we’ve characterized it as a Katrina moment. You shouldn’t need to have a natural disaster to call attention to places where 30% of students drop out and 60% are on the lowest categories on MCAS.”

– Jamie Gass, *The Callie Crossley Show*, WGBH

“We’re in a situation where state and federal governments are dictating to the insurers what the market should be. If this trend continues and health care utilization rises, whether they’ll be able to make money is up for grabs.”

– Josh Archambault, *The Boston Globe*

“The Pioneer Institute has been a strong advocate for charter schools over the past two decades. The push for charter schools playing a greater role in the state’s overall educational opportunities for children – particularly in Lawrence – resonated as a key theme yesterday.”

– Mark Vogler, *Lawrence Eagle-Tribune*

“Why does the Legislature cloak itself from the very audits and transparency requirements that they insist on for the rest of us?”

– Jim Stergios, *Boston Herald*

“The Education Department is pretending that three laws do not mean what they clearly say. This is documented in the Pioneer Institute’s report “The Road to a National Curriculum: The Legal Aspects of the Common Core Standards, Race to the Top, and Conditional Waivers” by Robert S. Eitel, Kent D. Talbert and Williamson M. Evers, all former senior officials in the Education Department.”

– George Will, nationally syndicated columnist

“House and Senate Republicans routinely file bills to subject the Legislature to the audit requirement. But when the Legislature is so overwhelmingly controlled by one party, legislation championed by the minority seldom sees the light of day.”

– Mary Z. Connaughton, WBUR’s Cognoscenti

“Think about the Metco Program for a second. We spend about \$5,000 per student, and those students are allowed to go to places like Brookline, to Wellesley, to Lincoln-Sudbury and access a great education in those districts.”

– Jim Stergios, *WBUR*

“Only in the past year have state legislators started becoming familiar with the \$16 billion unfunded mandate on states and localities, the federal legal prohibitions [against] Common Core, and the mediocre quality of the standards. And now you are seeing a number of states advancing resolutions and legislation to pull back out of the effort.”

– Jim Stergios, *The Heartlander*

“The best thing you can say for [local food and beverage bans] is that they are inefficient and amount to little more than symbolic actions. Then there is the fact that they intrude on people’s liberties.”

– Jim Stergios, *The Boston Globe*

“Gov. Patrick, Secretary Reville and other state officials must realize the damage the national standards are doing to the high school English curriculum and require year-long courses in American and British literature, as well as a classical literature course in Grade 9 or 10. If they do not, their lasting legacy to the Bay State’s schoolchildren will be one of trading that which is beautiful and enduring for the jargon-filled dead language of educationists.”

– Jamie Gass, *Standard Times of New Bedford*

“Thanks to Common Core national education standards, Massachusetts students are learning 60 percent less about the many great poets and literary figures who hail from the Bay State.”

– Jamie Gass, *The Lowell Sun*

“The more conservatives have been forced to think about health care, the more they’ve understood the merits of state experimentation. Jim Stergios, executive director of the Pioneer Institute—a free-market think tank in Boston that has published a book on ObamaCare and RomneyCare titled “The Great Experiment: The States, the Feds, and Your Health Care”—argued in a recent conversation that the fundamental mistake of ObamaCare was in imposing a giant, untested law on an unwilling nation.”

– Kim Strassel, *Wall Street Journal*

“It seems unimaginable, but today’s education leadership both in Massachusetts and Washington, D.C., is so anemic that the same country that helped win World War II, put a man on the moon, and defeated Soviet communism is failing to instruct its young people about even the basics of the Civil War, an event Shelby Foote called ‘the crossroads of our being.’”

– Jamie Gass, *MetroWest Daily News*



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Unrestricted Donations	\$1,005,603
In-Kind Donations	\$15,000
Restricted Donations	\$1,066,257
Other Revenue	\$28,602
Total Revenue	\$2,115,462

Expenses	
Employment Costs	\$819,811
Outside Services	\$102,109
Research Contracts	\$204,907
Printing & Publishing	\$72,545
Distribution Costs	\$31,850
Events & Meetings	\$191,799
Staff Business Expenses	\$40,864
Office Operations	\$140,601
Internet/Website	\$2,037
Total Expenses	\$1,606,523
Other Income	\$88,877
Other Expenses	\$9,735
Increase in Net Assets	\$588,081

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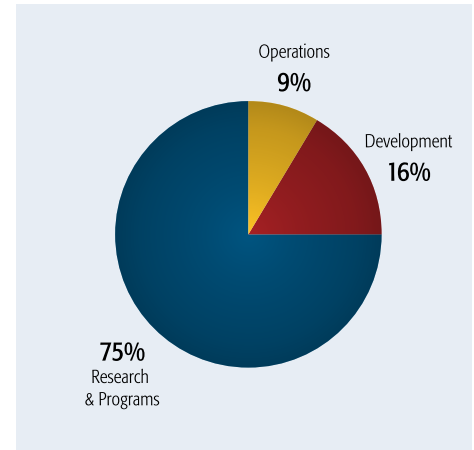
Assets	
Cash	\$526,961
Contributions Receivable	\$117,318
Investments	\$1,996,807
Fixed Assets	\$5,551
Other Assets	\$36,131
Total Assets	\$2,682,768

Liabilities & Equity	
Accounts Payable & Other Accrued Expenses	\$54,441
Total Liabilities	\$54,441

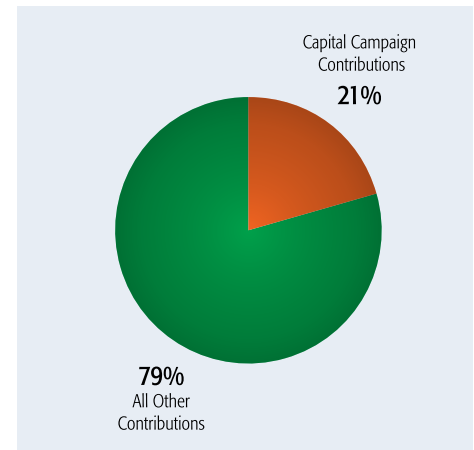
Net Assets	
Unrestricted Funds	\$820,600
Temporarily Restricted Funds	\$228,105
Permanently Restricted Funds	\$1,579,622
Total Net Assets	\$2,628,327
Total Net Assets & Equity	\$2,682,768

REVENUES

Expenses by Category

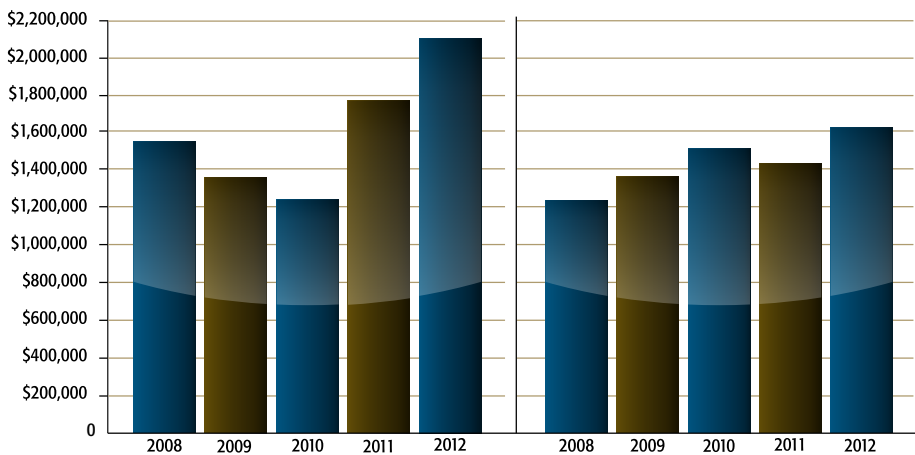


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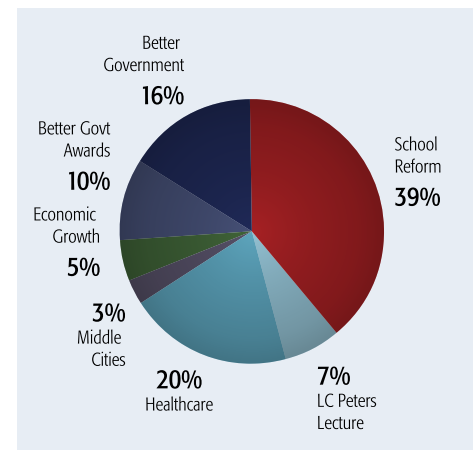


REVENUE

EXPENSES



Expenses by Program Area





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We wish our longtime research director Steve Poftak the very best in his new role as executive director of Harvard's Rappaport Institute.



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Iliya Atanasov is Pioneer’s Senior Fellow on Finance, and he is leading the Institute’s research initiatives on public pensions, infrastructure, and municipal performance. A former Presidential Fellow at Rice University in Houston, Texas, Atanasov is a PhD Candidate in Political Science and Government and an MA Candidate in Statistics.



Senior Fellow on Education

Cara Stillings Candal is the Director of Research and Curriculum at the Center for Better Schools/National Academy for Advanced Teacher Education. Cara has worked in the field of education for 15 years as a high school teacher, a curriculum and assessment specialist for the Riverside Publishing Company, and as a Research Assistant Professor at the Boston University School of Education. Cara is the author of numerous articles on the charter school movement, both nationally and in Massachusetts, and on the Elementary and Secondary Education Act. She is also the editor of the book, *Partnering for Progress: Boston University, The Chelsea Public Schools, and Twenty Years of Urban Education Reform*.



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.



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 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.

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