

MASSACHUSETTS

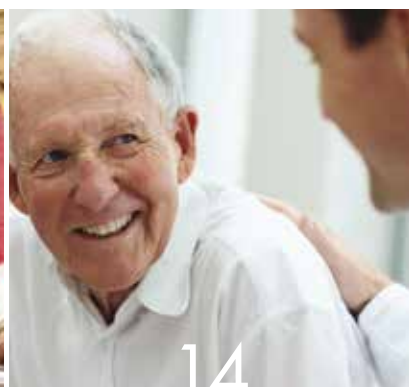
EDUCATED, HEALTHY & PROSPEROUS



PIONEER INSTITUTE
PUBLIC POLICY RESEARCH

2014
ANNUAL REPORT

TABLE OF CONTENTS



4	Our Mission	30	Signature & Member Events
5	Pioneer by the Numbers	32	Lovett C. Peters Lecture
6	Letter from the Director	34	Pioneer Financials
7	Center for School Reform	35	More Events
14	Center for Healthcare Solutions	36	Pioneer Lead Donors
17	Hewitt Healthcare Lecture	37	Pioneer Contributors
18	Center for Better Government	39	Senior Fellows
24	The Better Government Competition	41	Policy & Academic Advisory Boards
26	Center for Economic Opportunity	42	Staff
28	Media		





OUR MISSION

Pioneer Institute, founded in 1988, 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.

Pioneer promotes high-quality public schools, affordable healthcare, effective government, and economic opportunity by publishing research and engaging the public through media campaigns, forums featuring nationally recognized speakers, and information sessions with influential thought leaders.



Center for School Reform

Promotes excellent school options for all children, world-class liberal arts-based academic standards, and accountability for results in public education.



Center for Healthcare Solutions

Advances high-quality and cost-effective care through a greater range of patient options and market-based approaches to healthcare policy.



Center for Better Government

Promotes government that delivers high-quality public services, focuses on core functions, and is transparent to Massachusetts residents.



Center for Economic Opportunity

Fosters policies worthy of Massachusetts' innovators, investors and employees — pro-business creation and pro-job growth.

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

BY THE NUMBERS



30
Publications

research papers, policy briefs, testimony, and event transcripts

1,954
Media Hits

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



123
Attendees

average per Pioneer event

The Boston Globe
“For decades, the independent, libertarian-leaning Pioneer Institute has loomed large in Massachusetts policy debates. Now, it has a national profile as the brains of the Common Core opposition.”

– Joanna Weiss, columnist, *The Boston Globe*, “Will Pioneer Institute Knock Out Common Core?”

61
Events

featuring Pioneer



Cokie Roberts

BOARD OF DIRECTORS

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Figures reflect Pioneer’s 2014 fiscal year: October 1, 2013 through September 30, 2014



FREEDOM. PROSPERITY. FOR ALL.

Pioneer’s mission can be summarized in four words: *Freedom. Prosperity. For all.*

It’s a mission with powerful clarity and a long history.

In 1780 John Adams fashioned Massachusetts’ magisterial Constitution, the oldest in continuous use in the world. It granted Massachusetts citizens “the power of enjoy-

ing, in safety and tranquility, their new rights and the blessings of life” and took “measures necessary for their safety, prosperity and happiness.”



Jim Stergios
Executive Director

Individual rights. The power *and enjoyment* of liberty. The conviction that all people rightfully aspire to prosperity and happiness. These were radical ideas.

Pioneer was established on the understanding that ideas are vital for a democracy. Ideas are what test and sustain the institutions of a free society. From our beginnings, Pioneer fulfilled a mission to put ideas into action. To this day, Pioneer unabashedly aspires to the mantle of intellectual leadership in public policy.



Stephen D. Fantone
Chairman

Of all the powerful ideas we attribute to Adams’ generation, perhaps economic mobility — the ideal of a socially mobile society based on education, good habits, and hard work — is the most radical.

Today that ideal is at risk.

Proponents of using bureaucracies to increase social mobility ignore their weak track record. Pioneer brings a fresh, evidence-based approach to this challenge, as well as a focus on the underlying drivers of mobility — excellence in education, access to affordable healthcare and an emphasis on entrepreneurship and innovation.

In 2014, Pioneer’s top priority remained excellence in education. The Institute conducted a statewide campaign supporting charter school expansion and high-quality, state-based standards.

Our health care portfolio raised public awareness about the true costs of implementing the federal law, and promoted patient access to affordable medical care and price transparency.

Finally, Pioneer promoted fair, pro-growth tax policies, opposed megaprojects with negligible job impacts, and investigated the operations and financial management of the MBTA.

Undergirding our work is a determination to provide practical, academic-quality research that will put the interests of people — including the protection of their freedoms and ability to prosper — ahead of the interests of government.

We are deeply indebted to you, our supporters, for making this important work possible.



GREAT OPTIONS FOR PARENTS, REAL OPPORTUNITY FOR KIDS

In 2014, Pioneer Institute continued its successful drive to expand the menu of education options for all Massachusetts children, and promote academic standards that are state-based, rigorous, and rich in liberal arts content. Jim Stergios and Jamie Gass made more than 700 print, TV and radio press appearances on these topics, and presented at dozens of education-related public forums across the country.

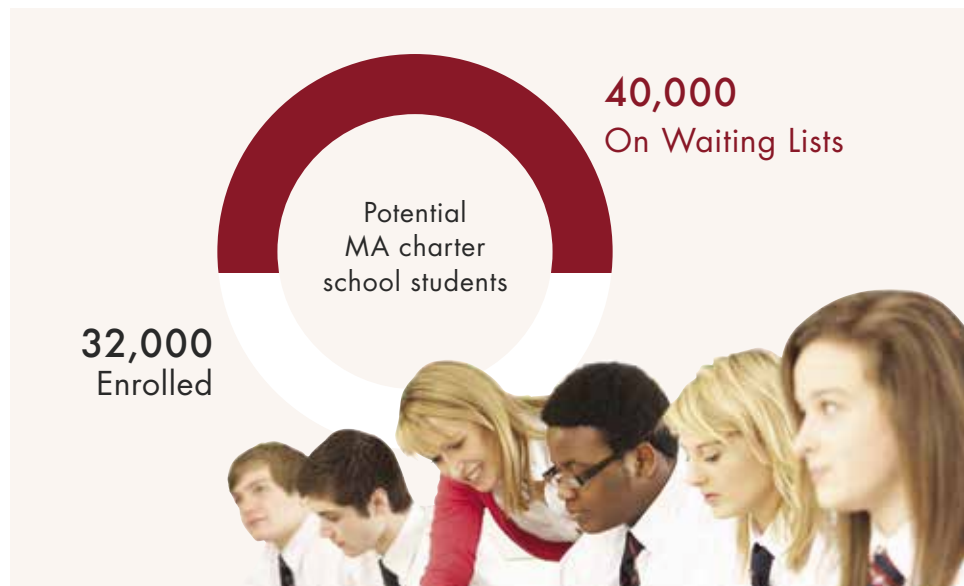
In Massachusetts, as the state prepared to elect a new Governor, Pioneer published a candidate survey on K-12 education policy. The results revealed near-unanimous support among respondents for Pioneer's positions on expanding charter schools, increasing access to vocational-technical schools, and reinstating the U.S. History MCAS exam as a high school graduation requirement.

A 2013 Stanford University study found that Massachusetts charter students gain an additional month and a half of learning in English and two and a half months in math each year compared with their peers at traditional public schools. Massachusetts charter schools enroll over 32,000 students, while another 40,000 are on waiting lists. In Boston, 7,000 students attend charters, while 15,000 waitlisted students vied for 1,700 seats last year.

To coincide with the state Board of Education's annual charter school approval deliberations, and with legislation expanding charter schools in urban districts, Pioneer waged a multi-media advertising and advocacy campaign, *Boston 2 in 1 Now*, urging charter expansion. The Institute also held an event on charter schools that re-

Making the Case for More Charter Schools

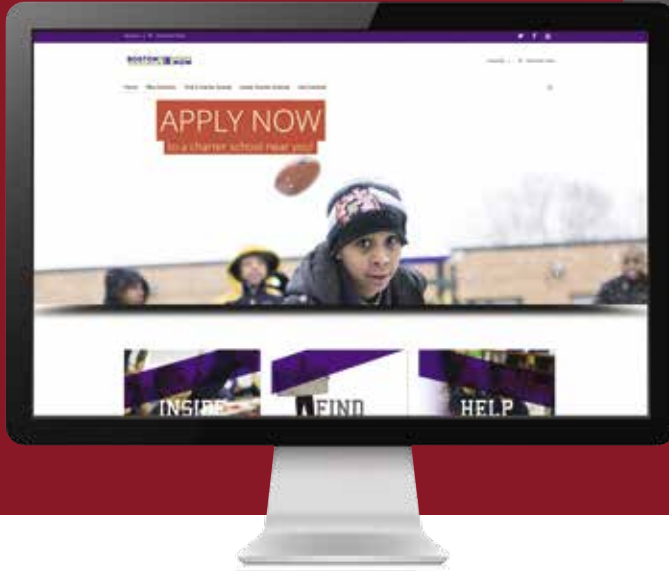
Pioneer has long promoted charter schools in Massachusetts, and today they are the most successful public schools in the country at closing achievement gaps among low-income and minority students. Demand for charter seats far outpaces available openings in Boston and statewide.



Boston 2 in 1 Now - a multi-media advertising and advocacy campaign



Bus Advertisements



Interactive Map



Web Banner Ads

State-of-the-Art Website boston2in1now.org

ceived national press attention, and successfully placed over 90 op-eds supporting charter schools and school choice. The initiative aimed to inform parents about Boston charter schools' success, and give them a voice in their children's future.

As part of the initiative, Pioneer developed a state-of-the-art website that served as a resource for information on application deadlines, with an interactive map of school locations by neighborhood, videos that provided in-depth interviews with charter students, parents and teachers, and a call-to-action center to lift state restrictions on charter school expansion. Website visitors sent over 6,000 letters in support of charters to public officials and the media, culminating in pro-charter editorials in the *Boston Herald*, *The Boston Globe*, *Worcester Telegram & Gazette*, *Fall River Herald News*, *MetroWest Daily News*, and other newspapers across the state.

Pioneer also promoted a brief video appeal that received 45,000 views, and

placed full-color advertisements in the *Bay State Banner*, an African-American-owned news weekly. Ads were displayed on MBTA buses along routes in Dorchester, Mattapan, Roxbury and other underserved neighborhoods.

During Pioneer's campaign, the Massachusetts board of education approved two new charter schools in Springfield and Fall River, and the expansion of one existing school in Fall River, opening up 1,700 new charter seats. The Massachusetts House of Representatives voted overwhelmingly to lift the cap on charter school enrollment in the state's lowest-performing public school districts.

However, the legislation was rejected by the Senate, and replaced with a bill that would have made char-



PLAY VIDEOS - boston2in1now.org/inside/

ter school expansion contingent on dozens of harmful regulations. Pioneer placed op-eds condemning the Senate's vote in the *Boston Herald*, the *Worcester Telegram & Gazette*, the *Fall River Herald News*, *Milford Daily News*, *Providence Journal*, *Taunton Daily Gazette*, *New Bedford Standard Times*, *Patriot Ledger*, *MetroWest Daily News*, *The Brockton Enterprise*, and *Commonwealth Magazine*.

“The Massachusetts Senate prides itself on being the more progressive of our two legislative branches. By voting not to increase access to high-quality schools in Boston and other Massachusetts cities, they have shown themselves to be anything but.”

— Jim Stergios, *Boston Herald*

During the heated debate on the charter school cap lift legislation, Pioneer issued a report, *Meeting the Commonwealth's Demand: Lifting the Cap on Charter Public Schools in Massachusetts*, by Peters Fellow Katherine Apfelbaum and Economist Ken Ardon, demonstrating that a relatively modest increase in spending in the state's 17 lowest-performing school districts could eliminate urban charter school waitlists for over 10,000 students. The report received extensive coverage and an editorial endorsement in *The Springfield Republican*; Apfelbaum published an op-ed in *The Huffington Post*; and the report authors were interviewed on *WBUR* and *Boston Neighborhood Network*.

A Pioneer forum, “Urban School Models: Choice and Charter Lessons from D.C. and New Orleans,” highlighted progress in the charter and school choice sectors in those cities, and the lessons for Massachusetts. Keynote speakers included former Washington, D.C. Mayor Adrian Fenty, and Pulitzer Prize-winning journalist Jed Horne, author of *Breach of Faith: Hurricane Katrina and the Near Death of a Great American City*. University of Arkansas Professor Patrick Wolf and Neerav Kingsland, chief strategy officer at New Schools for New Orleans, presented policy research. The event was featured in *Politico*.

Forums

OCT
14
2013

Urban School Models: Choice and Charter Lessons from D.C. and New Orleans

Keynote - Washington, D.C. Mayor Adrian Fenty

Introduction - Jed Horne, Pulitzer Prize-winning New Orleans journalist

Policy Presenters - Neerav Kingsland, New Schools for New Orleans, and University of Arkansas Professor Patrick Wolf

Panelists - Jeffrey Riley, Superintendent of Lawrence Public Schools, Kevin Chavous, national school reform leader, Kenneth Campbell, President of the Black Alliance for Educational Options, and Robert Scott, former Texas Commissioner of Education.

Moderator - Cara Stillings Candal

Co-Sponsors - the Program on Education Policy and Governance at Harvard Kennedy School, Black Alliance for Educational Options, the Massachusetts Charter Public School Association, and SABIS®

JAN
15
2014

America in the Age of MLK: Teaching the Civil Rights Movement in Schools

Keynotes - Robert Moses, Director, SNCC's Mississippi Project, and Taylor Branch, Pulitzer Prize-winning historian, *America in the King Years 1954-68* Trilogy

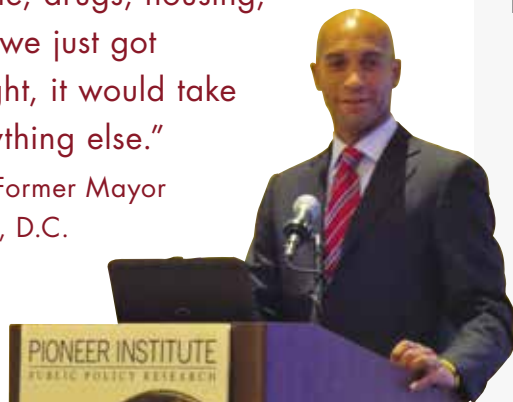
Panelists - Diane McWhorter, Pulitzer Prize-winning historian; Bill Carpenter, co-founder of Capital Entertainment; Robert Pondiscio, CitizenshipFirst; and Dr. Peniel Joseph, History Professor, Tufts University.

Moderator - Gerard Robinson, former education official, Florida & Virginia

Co-Sponsors - Program on Education Policy & Governance at the Harvard Kennedy School, the Black Alliance for Educational Options, the Charles Hamilton Houston Institute for Race and Justice at Harvard Law School, The Concord Review, We the People: The Citizen and the Constitution, CitizenshipFirst, The Gilder Lehrman Institute of American History, and the Massachusetts Historical Society

“People ask me all the time, what was the thing you’re most proud of. I always say, without hesitation, what we did for the schools. It’s the biggest issue that faces our communities, the issue that will interrupt the cycle of poverty. Mayors focus on crime, drugs, housing, jobs... but if we just got education right, it would take care of everything else.”

– Adrian Fenty, Former Mayor of Washington, D.C.



Pioneer published studies on Match Education’s tutoring and teacher preparation programs, which were found to be more effective and less expensive than such strategies as reduced class size and extended school days. An op-ed on the reports by author Cara Stillings Candal appeared in *EducationNext* (“Match Corps Goes National”). Match Education’s Executive Director, Stig Leschly, was interviewed by *RealClearRadio* host Bill Frezza about Boston charter schools’ success.

In June, the Massachusetts Board of Elementary and Secondary Education voted to adopt a proposal by Education Commissioner Mitchell Chester, referred to as the “growth model,” that would deprive more than 12,000 students in low-performing school districts of the opportunity to attend a charter school. During this important vote, Pioneer op-eds against the “growth model” were published in regional news outlets throughout Massachusetts and in Rhode Island, including the *Providence Journal*, *Lowell Sun*, *MetroWest Daily News*, *The Milford Daily News*, *Fitchburg Sentinel & Enterprise*, *Worcester Telegram & Gazette*, *New Bedford Standard-Times*, *Fall River Herald News*, and the *Taunton Daily Gazette*.

In July, Pioneer held an event with Abigail Smith, Washington, D.C. Deputy Mayor for Education, on D.C.’s

Forums

JAN
23
2014

Film Screening, “The Ticket: The Many Faces of School Choice”

Host - Bob Bowdon, Executive Director, Choice Media

Panelists - Beth Anderson, CEO, Phoenix Charter Academy Network, Cara Stillings Candal, Ed.D., Pioneer Senior Education Fellow, Charles Glenn, Professor, School of Education at Boston University

MAR
24
2014

“Remember the Ladies”: Women in U.S. History, Literature, and Schooling

Keynotes - Cokie Roberts, ABC News political commentator, and Valerie Boyd, Zora Neale Hurston biographer

Introduction - Dr. Kerry Healey, President, Babson College

Panelists - Jocelyn Chadwick, lecturer, Harvard Graduate School of Education and noted Mark Twain scholar; Catherine Clinton, Professor, Queen’s University Belfast and author of *Harriet Tubman: The Road to Freedom*; Joan Hedrick, the Charles A. Dana Professor of History at Trinity College and Pulitzer Prize-winning author of *Harriet Beecher Stowe: A Life*; and University of Arkansas Professor Emerita Sandra Stotsky, a former member of the Massachusetts Board of Elementary and Secondary Education.

Moderator - Kimberly Robinson, Professor, University of Richmond School of Law

Co-Sponsors - Program on Education Policy and Governance at the Harvard Kennedy School, the Gilder Lehrman Institute of American History, We the People: The Citizen and the Constitution, The Concord Review, CitizenshipFirst, the Charles Hamilton Houston Institute for Race and Justice at Harvard Law School, Citizen Schools, the Massachusetts Historical Society, and the League of Women Voters Massachusetts

successful partnership with AppleTree, a charter school network providing high-quality early childhood education for low- and middle-income children. Pioneer Senior Fellow Cara Candal presented research findings showing that AppleTree students outperform their district peers. The event and report received coverage in *RealClear Education*, the National Education Policy Center, and *Education Townhall*.

Expanding the Menu of School-Choice Options

Across the U.S., there are nearly 60 school choice programs operating in 28 states and D.C., giving students access to vouchers, education savings accounts, tax-credit scholarships, and individual tax credits that they can use to attend private and parochial schools. Yet in Massachusetts, where two-fifths of residents are Catholic, and Catholic schools outperform the state's public schools, access to these programs is blocked. Blaine and Anti-Aid amendments to the state constitution, remnants of 19th century anti-Irish bigotry, prohibit the use of public dollars for K-12 private school tuition.

A Pioneer study entitled *Giving Kids Credit* found that adoption of a scholarship tax credit program in Massachusetts could benefit thousands of low-income students and potentially save money. An op-ed publicizing the report's findings appeared in *The Boston Globe*; Pioneer's Jamie Gass and Economist Ken Ardon discussed the research with *Boston Neighborhood Network News* Host Chris Lovett; and the report received coverage in *Cato Institute's Commentary*.

During National School Choice Week in January, Pioneer held a special movie screening with Bob Bowdon of Choice Media, of "The Ticket: The Many Faces of School Choice," which explores alternatives to the public school model. The film was followed by a panel discussion on education reform in Massachusetts. The screening led to a television interview with Jamie Gass and a SABIS charter schools representative on *WGBY*, the Western Massachusetts *PBS* affiliate. In February, Pioneer held a members' luncheon with Parth Shah, founder and president of the Centre for Civil Society, a non-profit think tank based in New Delhi that promotes school choice in India.

Aiming Higher for K-12 Academics

Pioneer provided testimony and participated in public forums against weaker quality national K-12 education standards across Massachusetts, New England and the U.S. As a result, half of Massachusetts communities have opted to continue using the state's current assessment, MCAS, rather than adopt the Common Core-aligned Partnership for Readiness in College and Careers (PARCC) test. Districts across the state are struggling with the technology costs and other issues associated with PARCC, and some have refused to participate in the field test. State Education Commissioner Mitchell Chester is the Chair of the PARCC Governing Board, a role which Pioneer has argued is a conflict of interest given that he will make a recommendation on whether to adopt PARCC.

Pioneer's campaign against Common Core stems from the Institute's deep conviction that the national standards initiative aims too low, with terminal expectations in Algebra and a significant reduction in classic literature. Massachusetts' own nation-leading K-12 education frameworks and assessment system have been a proven success. Forcing weaker national standards on Bay State schools shortchanges students who deserve to be held to high expectations.

"The quality of the vocabulary found in classical literature, poetry, and drama is just much higher than what Common Core offers through informational text and nonfiction."

– Jamie Gass, *The Boston Globe*

In addition, Pioneer has long understood that Common Core represents tens of billions of dollars in unfunded mandates on states and localities. Across the U.S., parent-driven grassroots movements have caused a backlash against federal overreach in K-12 education. As a result, Oklahoma, Indiana, Missouri, and North and South Carolina withdrew from Common Core last year, and 12 states have departed from PARCC, jeopardizing the testing consortium's eligibility for over \$100 million in federal funding.

Pioneer research questioning Common Core’s legality informed Louisiana Governor Bobby Jindal’s decision to file an anti-Common Core lawsuit on the grounds that three federal laws prohibit any federal role in nationalized K-12 standards, testing, curriculum, or instructional materials.

Pioneer has been able to play a key role in these states’ repeal initiatives because of its comprehensive research. Over the past year, the Institute released several studies exploring Common Core’s quality. *In The Revenge of K-12: How Common Core and the New SAT Lower College Standards in the U.S.*, Richard P. Phelps, education author, and R. James Milgram, Stanford professor of mathematics *emeritus*, showed that adoption of national standards will reduce enrollment in high-level high school math courses and fail to prepare students for science, technology and engineering. The report received coverage in *Breitbart News*.

Imperiling the Republic: The Fate of U.S. History Instruction under Common Core was authored by preeminent Founding-era historian Ralph Ketcham, Syracuse University professor *emeritus*; Anders Lewis, a high school history teacher with state standards-writing experience; and Sandra Stotsky, University of Arkansas Professor *emerita*. The authors found that Common Core will marginalize and weaken U.S. History instruction by merging it with ELA. The study received media coverage in *National Review*, *Breitbart*, *The Daily Signal*, and other outlets.

“I want to endorse Pioneer’s agenda to try to restore teaching American history as a standard in the schools. Since our history is the story of freedom at the heart of the constitutional promise, then some grasp of American history is essential to American citizenship.”

– Taylor Branch, Pulitzer Prize-winning Historian and Author of *America in the King Years*



Another Pioneer study, *Common Core’s Validation: A Weak Foundation for a Crooked House*, raised important questions about the qualifications of the members of the Common Core Validation Committee. In April, during National Poetry Month, Pioneer published *The Dying of the Light: How Common Core Damages Poetry Instruction*, warning about the dramatic reduction in time spent on literary texts. The study was co-authored by Anthony Esolen, a poet, Dante translator, and professor of literature at Providence College; Jamie Highfill, an award-winning English teacher; and Stotsky. The report received front-page coverage in *The Boston Globe* and was the subject of an editorial.

Forums

JUL
31
2014

District and Charter Early Childhood Ed Lessons from D.C.

Keynote - Abigail Smith, Washington, D.C. Deputy Mayor for Education

Policy Presentation - Cara Stillings Candal, Pioneer Senior Education Fellow

Panelists - Jeanne Allen, president *emerita* of the Center for Education Reform; Cynthia Brown, senior fellow at the Center for American Progress; Leo Casey, executive director of the Albert Shanker Institute; and John McKoy, Fight For Children’s director of programmatic initiatives

Moderator - former Florida and Virginia education official Gerard Robinson

Co-Sponsors - the Program on Education Policy and Governance at Harvard’s Kennedy School, Friedman Legacy Day 2014, the Black Alliance for Educational Options, the Massachusetts Charter Public School Association, and SABIS®

SEP
23
2014

RealClear Radio Hour Radio Taping: “Why Are Boston Charter Schools So Effective?”

Introduction - Mary Connaughton

Keynote - Stig Leschly, CEO, Match Education

Host - Bill Frezza, RealClear Radio Hour

“David McCullough writes that George Washington’s great genius was keeping the army together. But George would say he couldn’t do it without Martha.”

– Cokie Roberts, *ABC News* commentator and author, *Founding Mothers: The Women Who Raised Our Nation*



photo credit
Glynis Gordon

In *Cogs in the Machine: Big Data, Common Core, and National Testing*, Pioneer called attention to threats to privacy as a result of the federal government’s use of new technology to collect and share sensitive student data, beginning in preschool. Authors Emmett McGroarty and Jane Robbins of the American Principles Project, and Joy Pullmann of The Heartland Institute, offered recommendations to enact student privacy laws.

In a two-part video series on Common Core that received nearly 30,000 views, Pioneer Executive Director Jim Stergios highlighted Pioneer’s extensive research showing that the standards initiative was not state-led, and that it violates three federal laws and will far exceed cost estimates for implementation. Stergios and Stotsky were also featured commentators in the film, “Building the Machine.” Produced by the Home School Legal Defense Association, it received 370,000 views.

Prioritizing U.S. History Instruction

Despite a 2006 promise to place U.S. History on the MCAS exam, required for high school graduation, Massachusetts high school students are not required to demonstrate knowledge of U.S. History or Civics to obtain a diploma. As a result, history courses are often marginalized in favor of tested subject areas such as ELA, math and science.

To help revive U.S. History and Civics instruction in K-12 public schools, Pioneer has been hosting a series of public forums featuring prominent historians and education leaders. In January, Pioneer held a breakfast forum marking Martin Luther King Jr.’s birthday, and the 50th anniversary of key historical milestones in the Civil Rights

Movement. Speakers included Civil Rights leader Robert Moses, Pulitzer Prize-winning historians Taylor Branch and Diane McWhorter, and other experts. After the event, Moses was interviewed on *NECN*’s “Broadside” and editorials in support of restoring the U.S. History MCAS test appeared in the *MetroWest Daily News* and the *Worcester Telegram & Gazette*.

To celebrate women’s history month in March, Pioneer held a well-attended luncheon, co-sponsored by the League of Women Voters, “Remember the Ladies’: Women in U.S. History, Literature, and Schooling,” with Cokie Roberts, *ABC News* political commentator, *National Public Radio* Morning Edition contributor, and author of *Founding Mothers and Ladies of Liberty*. Zora Neale Hurston biographer Valerie Boyd served as co-keynote, Babson President and former Massachusetts Lieutenant Governor, Kerry Healey, was the emcee, and a distinguished panel of historians and scholars discussed the outlook for history and literature instruction in K-12 education.

Pioneer also awarded nearly \$4,000 to the five winners of the first annual Frederick Douglass Essay Contest in U.S. History, launched in tandem with an interactive website, *ACommonSense.org*, to foster more interest in history and civics. Students were expected to analyze important documents to develop an evidence-based argument on the responsibilities of citizenship. Contest brochures were distributed to all Massachusetts secondary schools in September 2013. Over 30 entrants participated, and an independent panel of judges selected the winners. The 1st place prize, \$2,500, was awarded to Dakota Foster, a student at the Middlesex School in Concord.



PATIENT-CENTERED & AFFORDABLE HEALTHCARE CHOICES

Pioneer Institute's Center for Healthcare Solutions focuses on policy changes and innovations that will advance affordable, high-quality care. The Institute gained adoption of regulatory changes increasing patient access to convenient care clinics, raised public awareness about the urgency of reforming retiree healthcare benefits, and stressed the importance of protecting medical privacy. Given the failure of the state's implementation of the federal Affordable Care Act (ACA) in 2014 — costing the state hundreds of millions of dollars and impacting the care of tens of thousands in the commonwealth — the Institute also served as an important resource for state lawmakers, reporters, and the public on this important issue.

Failure to Launch: Implementing the National Healthcare Law

Compared to other states, Massachusetts' implementation of the ACA was expected to be seamless given its successful past experience with a health insurance exchange. Instead of applying for a waiver and expanding its own fully functional enrollment system, the Patrick administration decided that complying with the federal law required rebuilding the entire website.

Enticed by the generous flow of federal dollars, the state contracted with CGI (the IT firm responsible for the U.S. government's botched Healthcare.gov project), to create an online health insurance exchange. Immediately after its October 2013 launch, the new website was fraught with major technical malfunctions that were compounded by poor responsiveness. Lengthy wait times frustrated

thousands of consumers, sparking widespread public outrage and daily media scrutiny.

After costing \$254 million to develop, Massachusetts' new exchange became one of the worst-performing systems in the country, enrolling fewer than 1,000 customers. Over 300,000 Massachusetts residents who were unable to purchase plans due to the website's inoperability were provided temporary Medicaid coverage, even though many were not income eligible for subsidized care.

In September, Pioneer released a study that estimated that the costs associated with transitioning to Massachusetts' ACA-compliant insurance exchange would top \$1 billion over two years. The Patrick administration publicly denounced the report, contending that ACA implementation was "on budget." But confidential documents obtained by Pioneer shortly after the report release (and confirmed by state officials) projected that the temporary Medicaid coverage would cost \$560.2 million alone in FY15. By including website expenses and administration, implementation costs are likely to reach *at least* \$1.3 billion.

Pioneer called for an immediate investigation by the state's Inspector General and the U.S. Health and Human Services Inspector General, so that the public can finally gain complete transparency on the full range of costs associated with the transition to the new health exchange and Medicaid coverage levels. Pioneer also requested that the FBI and the Government Accountability Office look into whistleblower accusations that state offi-

cials lied to federal officials about the website's progress during implementation in order to keep taxpayer funds, a possible civil and criminal offense. A similar investigation is currently open in the state of Oregon.

Access to High-Quality, Low-Cost Care: Convenient Care Clinics

In the months leading up to Boston's historic, closely watched mayoral election, Pioneer published a report and infographic calling for the city to end its costly ban on convenient care clinics. These lower-cost alternatives are often found in retail chains such as CVS, Walgreens, and many other settings, staffed by nurse practitioners and overseen by physicians. Nationally, their number increased by more than 600 percent from 2006 to 2012, and while there were numerous such clinics in eastern Massachusetts, none had opened in Boston.

Pioneer's report estimated that expanding these clinics could save upwards of \$6 billion over 10 years, steer patients away from expensive emergency room visits, and provide more families with better access to care, at lower cost, for minor illnesses and conditions. Clinics would also help address the shortage of primary care physicians.

Only about half the family practices in Suffolk County currently accept new patients and there are long wait times



Pioneer published a report and infographic calling for the city to end its costly ban on convenient care clinics.

for appointments, while the average wait time at a convenient care clinic is just 15-20 minutes. The average cost per visit for one chain of the commonwealth's convenient care clinics is half that of a visit to a primary care physician, and one-fifth the cost of a visit to an outpatient emergency room in Massachusetts. The number of ER visits in Massachusetts rose by 6 percent from 2006 to 2010, but the cost of those visits increased by more than 36 percent.

In 2013, Pioneer joined with business organizations in recommending regulatory changes to the Massachusetts Department of Public Health and the Board of Registration in Nursing that would expand the authority of advanced practice nurses and broaden the range of services available at convenient care clinics. In December, the Commonwealth adopted the recommended changes — a significant victory for patients and taxpayers.



Sustainable Reform: Retiree Healthcare Benefits

In October, Pioneer's Josh Archambault partnered with Neil B. Minkoff, MD, a former Commissioner of the Massachusetts Group Insurance Commission, to deliver testimony before the state legislature's Joint Committee on Public Service on "An Act Providing Retiree Healthcare Benefits Reform." They warned of the unsustainable costs of unfunded healthcare benefits for retirees, currently estimated at \$45 billion, \$30 billion of which falls on local municipalities.



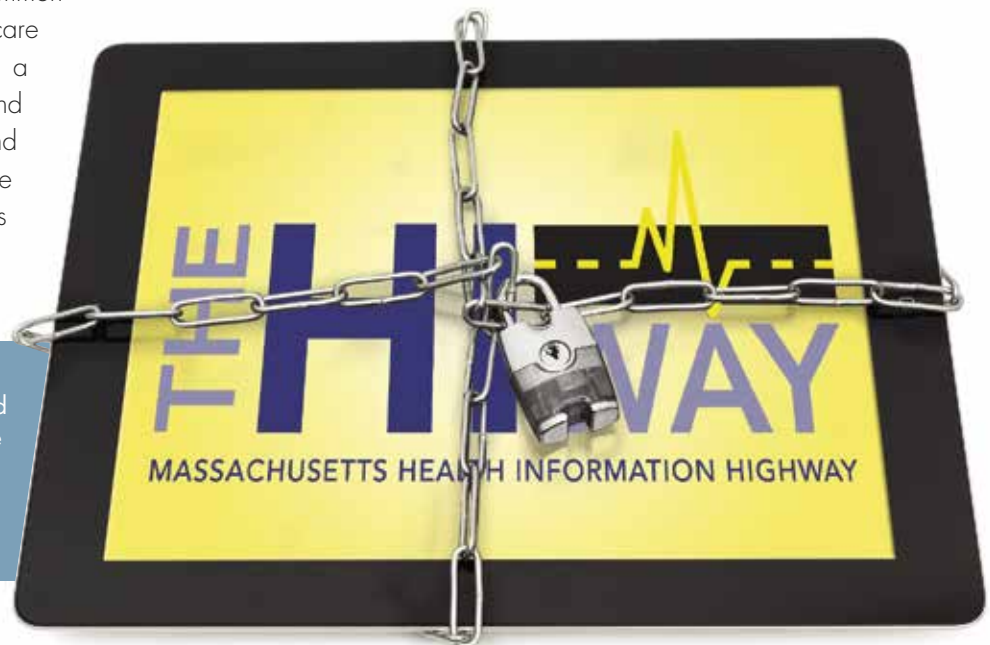
Municipalities have seen healthcare costs increase to 20% of local budgets up from 13.5% in 2001, and healthcare costs for the state's 50 largest municipalities grew 85% between 2002 and 2009. From 2007 to 2011, costs for healthcare coverage through the Group Insurance Commission grew 26.4%, while state revenue grew only 15%. The Commonwealth covers 80% of healthcare premiums for recent retirees, a population that is growing and living longer. Archambault and Minkoff recommended that the Commonwealth involve retirees in the cost discussion.

...with added
convenience
comes
serious risk

Privacy Protection: Electronic Health Records

Pioneer believes that citizens — not the federal government or medical institutions — should determine who can access their medical records. Massachusetts Governor Deval Patrick touted the Commonwealth's new Health Information Highway (Hlway) project, which enables doctors across the state to access a patient's records from any location. Policymakers are encouraging increased use of Electronic Health Records (EHRs), and other mechanisms that allow healthcare providers to store and share individuals' medical information.

EHRs hold the potential to reduce medical errors and promote efficiency, but with added convenience comes serious risk. Medical records contain demographic and identity information such as Social Security numbers, birth dates, addresses and phone numbers that are coveted by identity thieves. When a single credit card is sold on the black market with the full identity profile found in healthcare records, its value can be up to 20 times more than that of other cards. In January, Pioneer published a report urging policymakers to focus on reducing the risk of privacy and security leaks. The authors recommended that Massachusetts develop a plan to keep EHR systems financially viable after federal incentives end, and lower the threshold for public notification when information breaches occur.



“Coming up constructively with an alternative to ObamaCare that accomplishes what was aimed for, to cover at least half or more of the uninsured and pay for it, not through deficit spending like the Medicare Modernization Act, is a very difficult thing. And I would like to see a replacement that we could debate and look at.”

— Uwe Reinhardt



1 L-R Diane Schmalensee and Michael Ervolini;
2 L-R Josh Archambault, Matthew Veno, and David Przesiek

2014 Hewitt Healthcare Lecture

Pioneer Institute’s 2014 Hewitt Lecture continued the long-standing tradition of hosting nationally renowned healthcare policy experts for a lively exchange of ideas, at a gathering attended by 200 professionals in the fields of medicine, research, business, and public policy.

Four years after passage of the national healthcare law, polling still reflects splintered public opinion. Two of the nation’s top experts, Thomas Miller, Resident Fellow at the American Enterprise Institute, and Uwe Reinhardt, Professor of Economics and Public Affairs at Princeton University, addressed the 2014 topic, “What Just Happened and What’s Ahead for the Affordable Care Act?” They shared perspectives on the political climate of the law’s adoption, its problematic implementation, regulatory complications, impact on healthcare cost and quality, and practical recommendations for reform. *Wall Street Journal* reporter Jon Kamp moderated the discussion.



“Give the states some flexibility but ask them to be accountable for better health outcomes in return for that, not just a one-sided trade to play around with someone else’s money.”

— Tom Miller



RESPONSIVE & INNOVATIVE STATE & MUNICIPAL MANAGEMENT

Pioneer played a leading role in advancing public accountability on some of the year's most newsworthy topics. Through timely research, meetings with policymakers, and outreach to journalists, Pioneer's experienced team of analysts helped save taxpayers over \$500 million, and increased transparency at powerful agencies throughout the City of Boston and Massachusetts. Pioneer's active media presence, with over 800 press mentions and appearances, helped drive important conversations about state spending priorities, public safety, and government transparency.

New Approaches to Old Challenges

With the election of Martin Walsh, Boston's first new mayor in two decades, the City faces an exciting opportunity to transform municipal operations and demonstrate more responsiveness to the needs of residents and taxpayers. Pioneer seized on this chance to address some of Boston's longstanding challenges – containing employee cost growth, and ensuring responsible oversight of city-owned property.

In 2014, as the City of Boston entered collective bargaining negotiations with the Boston Firefighters Union, Pioneer Research Director Greg Sullivan published analysis of salary data showing that the proposed three-year deal would cost taxpayers over \$92 million, including \$20 million in retro-

active pay and \$71 million in extra compensation.

The report revealed that Boston's FY2013 Fire Department and EMS budget was the most expensive of the 30 largest U.S. cities adjusted for population, more than twice the national average and twice the Fire/EMS budgets of New York, Chicago, Houston, Los Angeles, and Philadelphia. It also attributed Boston's higher costs to its excessive staffing and compensation levels.

Sullivan drew media and public scrutiny to the contract, appearing on a *WCVB Team 5 Investigates* news segment to highlight the fact that it disproportionately benefits highly paid administrators and supervisors over rank-and-file firefighters. As a result, Boston Mayor Walsh, also interviewed for the segment, vowed to review costs and eliminate unnecessary positions.



“The new Boston firefighter contract represents financial generosity to the extreme, going to people who don’t directly fight fires – the brass is overstaffed and overpaid.”

– Greg Sullivan, *WCVB-TV*

Mayor Walsh campaigned on a promise to overhaul one of the City’s most influential – and controversial – agencies, the Boston Redevelopment Authority (BRA). This office is responsible for approving billions of dollars in construction projects and managing rent on public property. But over many years, the BRA has failed to collect millions in lease payments and fees, and has come under fire for secretive negotiations that have resulted in giveaways to private interests.

In 2013, details emerged about the circumstances of a no-bid, \$7 million deal granting the Red Sox exclusive use of city streets in perpetuity. The BRA did not allow a public hearing prior to the vote, and denied a request by the state Inspector General for an estimate of the property value.

In response, Pioneer’s Greg Sullivan questioned the legality and fairness of the deal, and called for an audit of the agency in the *Boston Herald*, *The Boston Globe*, and *Breitbart News*. Mayor Walsh commissioned an independent review, and pledged that the BRA will commit to public meetings and a 10-day public comment period before projects can be approved. The Mayor also removed over a dozen BRA employees, updated the agency’s record-keeping software, and hired a new director and staff to improve oversight of collections. The Fenway deal is under investigation by the state Inspector General.

Protecting the Commonwealth

Effective government is not just about balancing budgets – it’s also a matter of public safety. Last year, serious questions arose involving the Commonwealth’s oversight of its transportation infrastructure, criminal justice system, and child welfare agency. In open letters to public officials and subsequent television appearances, Pioneer called for specific reforms to prevent future tragedy.

In August, after two truck rollover accidents on I-93 occurred within one week of each other, Pioneer published an open letter to the Secretary of Transportation requesting a review of the crash-worthiness of the guardrails near the Zakim Bridge and the Leverett Connector. In a subsequent *WBZ-TV* interview, Greg Sullivan noted that state officials knew of safety concerns with the barriers several years before construction of the Zakim Bridge ramps. During the TV segment, the state Highway Administrator pledged to build a new, higher barrier for that stretch of road.

In one of the worst criminal justice scandals in the country, disgraced state chemist Annie Dookhan admitted to tampering with drug evidence at a Department of Public Health-run crime lab over a period of nearly ten years. Her misconduct resulted in 40,000 cases tainted, millions of taxpayer dollars spent, and 600 criminals released from prison. In a *Fox 25* interview during her hearing, Greg Sullivan questioned the appropriateness of her three-to-five year prison term, and called for stricter enforcement of sentencing guidelines.

Horrible events involving the deaths of infants and a 5-year-old child under the supervision of the Department of Children and Families (DCF) drew public outrage over administrative failures. DCF’s outdated technology and case management system left social workers unable to keep track of home visits, medical screenings, and allegations and evidence of abuse and neglect.

Federal audits revealed that only 12 percent of DCF social workers conducted monthly home visits in compliance with government mandates; 13 percent of children had consistent monthly contact with their caseworker; just over 7 percent received required 30-day medical visits; and one out of six children suffered maltreatment.

Calls for a leadership change at the dysfunctional agency were initially dismissed by Governor Patrick, but Pioneer’s Greg Sullivan immediately took to the airwaves on CBS’s “Keller @ Large” and *Fox 25* urging the administration to acknowledge responsibility and implement reforms. Within weeks, the Governor accepted Roche’s resignation.

The winner of Pioneer’s 2014 Better Government Competition, which sought out ways to improve government through technology, was Compass CoPilot, an applica-

tion used by child protection and human services agencies across the country to improve case management and lessen the time spent on paperwork by frontline workers. Massachusetts Health and Human Services officials have met with Compass CoPilot's developers to discuss a potential partnership.

Upholding the Public Trust

One of the most heavily covered stories of the past few years has been the implementation of casino gambling in Massachusetts. Pioneer was among the first to sound the alarm about the integrity of the state's casino licensing process.

In 2013, Greg Sullivan called on the Massachusetts Gaming Commission Chairman to recuse himself from deliberations over the eastern Massachusetts casino license after it became clear that a longtime associate stood to gain millions in profits. In a Pioneer blog that led

"As far as I am concerned, the gaming commission is a state agency. And these examples of lavish travel and dining expenditures are wildly beyond what state employees are entitled to."

– Greg Sullivan, *Boston Business Journal*

to an interview on *NECN's "Broadside,"* Sullivan issued a reminder that Commission members are subject to a stricter ethics code, which prohibits them from voting on matters that pose a conflict of interest.

Sullivan's expertise on this issue was tapped again by *The Boston Business Journal*, *The Boston Globe*, and CBS's "Keller@Large" for investigative reports revealing that the Gaming Commission spent hundreds of thousands of dollars on luxury travel, and that the Chairman attended a private event hosted by an applicant for a casino license worth hundreds of millions per year. In May, under growing pressure from the media and the public, the Gaming Chairman finally recused himself from the eastern Massachusetts license decision.

As the state legislature considered a \$1.1 billion proposal to expand the Boston Convention and Exhibition Center (BCEC), Pioneer issued a report, "Does BCEC Expansion Really Pay for Itself?" raising important questions about the cost in foregone revenue to the state, the impact on capital funding for long overdue transportation improvements, and the true market demand for more space.

The Massachusetts Convention Center Authority (MCCA) claimed that enlarging the facility by 60 percent would generate nearly 700,000 room nights annually. But Pioneer's analysis showed that the MCCA's performance has fallen far short of its original projections, and that across the U.S., attendance at con-



Pioneer was among the first to sound the alarm about the integrity of the state's casino licensing process.

"As Sullivan drilled down into the legislation, he says, he sees the makings of a 'classic sweetheart deal,' one that will effectively allow the Massachusetts Convention Center Authority 'to basically pick whomever they want' to put up a hotel and reap public subsidies that could be worth upward of \$100 million."

– Jeff Jacoby, *The Boston Globe*



ventions and trade shows declined from 126 million in 2000 to just 86 million in 2010.

In reviewing the expansion proposal, Pioneer also found that the MCCA sought to steer a \$110 million subsidy to a favored private developer for a hotel on Massachusetts Port Authority-owned land next to the convention center, sidestepping state procurement procedures.

Pioneer's persistent efforts to inform the debate about the project and expose the hidden subsidy garnered front-page coverage in *The Boston Globe* and the *Boston Business Journal*, on op-ed and mentions in the *Boston Herald*, and mentions on *NECN*, *WGBH*, *BNN*, *WRKO*, and other outlets.

The increased scrutiny prompted state Senate leaders to remove the hotel subsidy from the final bill, and insert language preventing the allocation of other public funds to the hotel project. The legislation also gave the state Inspector General oversight of the MCCA's procurement procedures, and changed the financing term of all borrowing from 40 to 30 years, saving taxpayers up to \$480 million. Facing a budget gap, the Baker Administration wisely delayed the bond offering needed to finance expansion, pending further review. The editorial boards of both *The Boston Globe* and the *Boston Herald* endorsed this decision, citing Pioneer's analysis.

Ensuring Pension Solvency

Massachusetts' fiscal stability depends on policymakers' willingness to address the state's long-term debt and unfunded retirement liabilities for pensions and healthcare, which totaled \$66 billion by the end of Fiscal Year 2013 — nearly twice the state's budget.

In 2014, Pioneer published a study estimating that state leaders' 2010 decision to postpone the deadline for full funding of the state and teachers' retirement systems from 2025 to 2040 may cost taxpayers up to \$26.4 billion. Another report found that changes to state law allowing local retirement boards to boost pension cost-of-living adjustments (COLAs) will saddle Massachusetts communities with an additional \$500 million expense over the next 20 years.

One of the major hurdles to progress has been the lack of transparency concerning the financial condition and performance of state and local pension systems. Last year, Pioneer provided relevant and timely research to lawmakers and the media exposing secrecy and mismanagement at one of the worst-performing systems, the MBTA Retirement Fund (MBTARF).

Pioneer Senior Fellow Iliya Atanasov became a key resource when *The Boston Globe* published a series of

articles exposing a \$25 million loss from an investment involving a former MBTARF executive director with a conflict of interest. The fund failed to disclose the loss in its annual report.

“The MBTA retirement fund’s poor performance and lack of transparency are serious cause for concern given the financial backing it gets from taxpayers. This is a big money issue. Last year the T contributed \$55 million towards the pension costs.”

– Greg Sullivan, WCVB-TV

Pioneer documented the MBTARF’s poor governance structure, lack of independent oversight, and the absence of a coherent investment strategy in its report, *Hard Lessons for Institutional Investors from the MBTA Retirement Fund*. The study also found that the MBTARF dramatically underperformed the Pension Reserves Investment Management (PRIM) Board, which oversees the state and teachers’ retirement systems.

Contrary to the MBTARF’s claim that the public is not impacted by its management decisions, another Pioneer report, *Solvency and Insolvency of the MBTA Retirement Fund*, showed that the Fund would become insolvent between 2024 and 2036 without taxpayer support. The MBTA contributes over \$55 million annually to the fund, from fares and dedicated taxes, and is responsible for covering three quarters of any underfunding.

MBTA pensions were 95 percent funded in 2006, but fell to only 68

percent by 2011, resulting in a \$726 million unfunded liability, according to another Pioneer study, *Have the MBTA’s Retirement Plans Gone Off the Rails?*. The report called for the T’s Retirement Fund to abide by investment management and solvency regulations governing the state’s other public pension systems. In *Myths and Reality about MBTA Pensions*, Pioneer estimated that the MBTA could save \$1 billion by raising the retirement age and transferring employees from MBTARF to the state system.

Pioneer’s in-depth research and advocacy resulted in a legislative hearing covered by *The Boston Globe*, the *Boston Herald*, *State House News Service*, and WCVB’s News Center 5, to force the MBTA to release its financial records to the public. After the hearing, in a victory for transparency, Governor Patrick vetoed changes to state law that would have weakened the MBTA’s disclosure requirements.

Encouraging Greater Transparency

Mary Connaughton, Pioneer’s Director of Government Transparency, serves as an indispensable resource for news investigation teams digging into hidden transportation costs. In March, she provided key analysis and appeared on CBS Boston’s I-Team segment on the Registry of Motor Vehicles (RMV). The RMV collects \$600 million in fees, ten times the agency’s operating costs, and by far the highest ratio in New England. Connaughton called for reforms that would ensure more accountability, includ-



“Every dollar that is collected from RMV fees that does not go to the roads and bridges ultimately winds up in the black hole of the MBTA.”

– Mary Connaughton,
WBZ-TV



ing transferring approval of fee increases to an appointed body that holds a public vote, rather than through the legislature.

Connaughton also manages Pioneer’s partnership with MuckRock, a service that has submitted more than 2,000 public records requests in Massachusetts over the past five years. In a *Boston Herald* op-ed, “State often keeps public in dark,” Connaughton and MuckRock’s Shawn Musgrave advocated for passage of legislation that would address the common tactics state agencies employ, such as stalling, silence, and the imposition of unreasonable fees, in response to public records requests. They also proposed that each state agency assign a transparency officer responsible for ensuring compliance with public records laws.

In 2014, Connaughton oversaw an internship program training college students and recent graduates to analyze state and local government performance using Pioneer’s online transparency tools. The transparency team published their findings in over two dozen blog posts on the Institute’s website, covering a wide range of topics, from an analysis of state spending, State House renovation costs, and structural problems at City Hall Plaza, to the size of the Governor’s staff and backlogs at the Chief Medical Examiner’s office.

Pioneer’s transparency team commended the Patrick Administration for establishing the new MassResults pro-

gram, an online performance measurement system that includes strategic plans and performance reports for each of the cabinet secretariats. But Pioneer’s transparency bloggers found that a feature of MassResults, COM-MBUYS, uses a clumsy interface to provide basic information on government contracts. They also found very selective reporting at both the Executive Office of Elder Affairs and the Department of Children and Families, an agency whose tragic management lapses were the subject of nightly news headlines last year. MassResults posted only 1 in 12 of DCF’s 2013 performance measures.

Pioneer’s online transparency tools provide a wealth of information for anyone interested in learning about how effectively their tax dollars are spent. MassOpenBooks.org visitors can review trends in public employee salaries and pensions. MassReportCards users can gain valuable insight about school and district performance before they make important decisions such as a home purchase. Pioneer’s newest addition to its transparency portfolio, MassAnalysis.com, allows users to compare how their city or town compares to others on spending, crime, fire incidents, taxes, employment, education and many other measures. This application integrates data from the Municipal Databank, FBI, Department of Elementary and Secondary Education, US Census and other state and federal agencies to provide a comprehensive review of municipal services across the commonwealth.

2014 Better Government Competition

The 23rd annual Better Government Competition highlighted the use of technology to transform public sector services. Pioneer received over 200 submissions, on topics ranging from lowering energy costs and digital learning to preventing fraud in government assistance programs.

The 2014 winning entry, if implemented, would help improve social workers' caseload management through mobile technology. "Compass® CoPilot," a program that integrates data collection and reporting at state and county human services agencies, is used in five states. Participating agencies experience daily net savings of 1.5 – 2 hours per employee. As a result, social workers can spend more of their time directly assisting families rather than filling out paperwork.

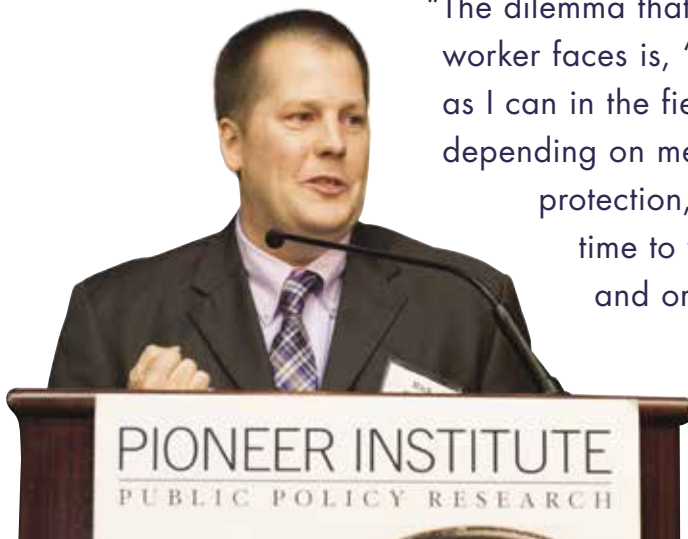


Elizabeth Fantone, Dr. Stephen Fantone, Gary Paul Magnant and Amir Nashat

The winning entry was submitted by Rich Bowlen, Director of Protective Services at Northwoods, an Ohio-based technology firm. His proposal addressed a problem that resonated deeply in Massachusetts, where the tragic consequences of communication failures within the state Department of Children and Families were widely publicized over several months.

The Competition's four runners-up offered innovative approaches to everyday problems, from obtaining parking permits for the handicapped and increasing patients' access to independent physicians, to helping cities get more value for publicly owned land, and delivering nearly 50 city services to Boston residents in their own neighborhoods.

In September, Pioneer held its annual Awards Dinner at the Boston Harbor Hotel, featuring a moving acceptance speech by Bowlen, who generously donated his \$10,000 award to Adoption & Foster Care Mentoring. Boston Mayor Martin Walsh delivered the keynote address, sharing his ambitious agenda to bring 21st century innovations and accountability to City Hall. He described his efforts to make city government more transparent, ensure high-quality schools for all Boston children, improve the City's civic engagement, and streamline the permitting process to grow jobs.



"The dilemma that every protective service worker faces is, 'Do I spend as much time as I can in the field seeing the child who is depending on me to offer them safety and protection, or do I use nearly all of my time to write, type, print, copy, sort and organize a paper trail to show all the work that I should be doing in the field?'"

– Rich Bowlen

“Civic engagement, both online and in-person, is an important part of city business, helping us restructure the way we do things. We’ve invited the tech community to talk about how we can reimagine the permitting process in Boston to grow jobs. We’re using different apps, like Citizens Connect, to be more responsive to residents, or City Hall to Go, for mobile delivery of services to neighborhoods.”

– Mayor Walsh



1 L-R Front Row Kyla de Asla, Mike Murphy, Caroline Murphy, Katherine Craven, Kerry Healey;
 L-R Back Row Jane Akin, Mike Magnor, Richard de Asla, Chris Brandner, Steve Akin
 2 L-R Front Row Sam and Caitlin Reiche, AJ Esquerra, Adam and Stephanie Zaremba;
 L-R Back Row Matthew Hawley, Jitin Asnaani, Dan Haley, Tim O’Brien, Dan Orenstein

The Better Government Competition winner and four runners-up were selected by a distinguished panel of judges: Andrew O. Davis, Managing Partner, Overall Capital Partners; Keith N. Hylton, William Fairfield Warren Distinguished Professor of Law, Boston University School of Law; Patrick Larkin, Director, The Innovation Institute, MassTech Collaborative; David O’Connor, Senior Vice President for Energy and Clean Technology, ML Strategies, LLC; and Kevin Stokes, Chief Information Officer, Town of Brookline. Pioneer thanks them for their commitment to the selection process, and to solving some of our most pressing public policy challenges.



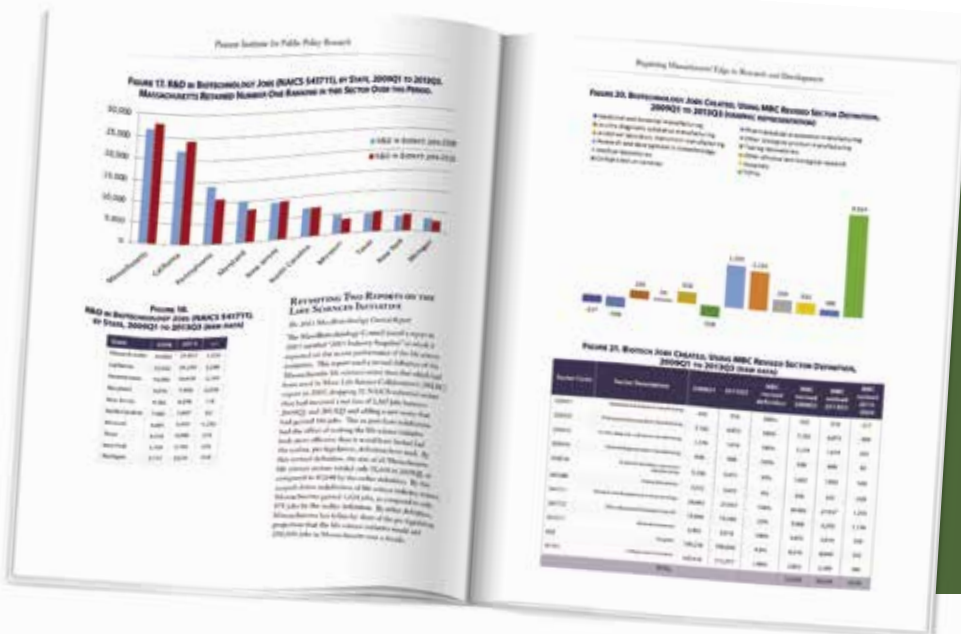


BROAD-BASED & SUSTAINED JOB GROWTH

Pioneer's 2014 work to hasten the pace of business and job growth in Massachusetts focused on the state's competitive advantage in the knowledge economy. The region's prestigious universities, highly skilled workforce, and venture capital leadership are a strong foundation for more investment and high-paying jobs. The problem is: Massachusetts has targeted specific industries for favorable tax incentives and other benefits, with negligible results. So the key question becomes: How can the Commonwealth outcompete other leading states for spending on both "pure" and manufacturing-related research and development?

Revitalizing Research & Development

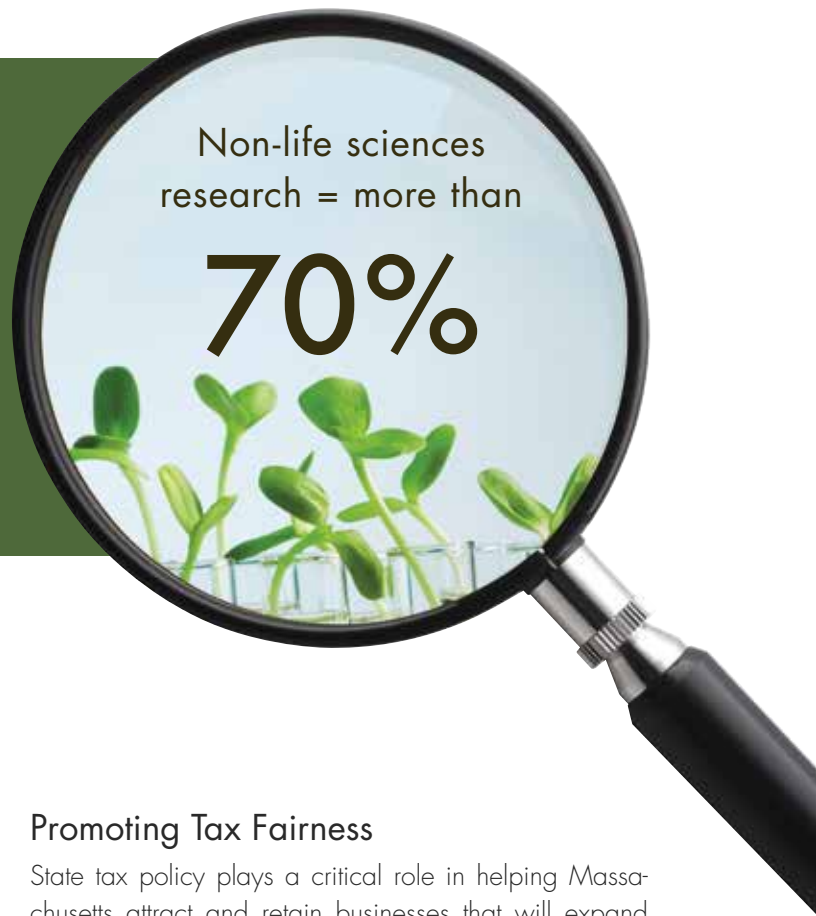
Pioneer's report, *Regaining Massachusetts' Edge in Research and Development*, raised questions about the success of the Massachusetts Life Sciences Initiative and its true impact on job creation. Proponents of the ten-year, billion-dollar package of tax credits passed in 2008 claimed it would generate 250,000 jobs. However, using the same methodology that the Massachusetts Life Sciences Center relied on in its own study, Pioneer calculated that the number of direct life sciences jobs the Commonwealth has actually created was just 571. After five years and \$525 million invested, the state spent nearly \$1 million per job.



Pioneer's report, *Regaining Massachusetts' Edge in Research and Development*, raised questions about the success of the Massachusetts Life Sciences Initiative and its true impact on job creation.

“Non-life sciences research makes up more than 70 percent of the research and development in Massachusetts. And these firms were left behind by the life sciences initiative.”

– Greg Sullivan, *The Boston Globe*



Even worse, while state leaders were subsidizing the biotech industry, they were neglecting research and development. More than two-thirds of all companies investing in R&D are not focused on the life sciences. Pioneer’s report noted that R&D expenditures by Massachusetts industries dropped by 19% between 2007 and 2011, while California’s increased by 16.9% and the rest of states’ by 9.2% on average. Massachusetts was the only one of the leading states for research and development to see overall R&D spending fall between 2007 and 2011.

Pioneer recommended that Massachusetts focus on all its R&D industries, not just life sciences companies, and proposed two enhanced R&D tax credits that are broader-based, like California’s, and that reward increased R&D spending in-state. This approach would better position Massachusetts to compete for investments and gain more of the market share that California has cornered.

The eye-opening report was released during the week that the Bay State Governor and top lawmakers gathered at the BIO international convention, the world’s largest biotechnology industry event, to tout the supposed success of the life sciences initiative. The report’s author, Greg Sullivan, appeared on *WBUR* and *Fox 25* calling for the state to reexamine its investment in this initiative. The study also received coverage in *The Boston Globe*, the *Boston Herald*, the *Boston Business Journal*, the *Worcester Telegram & Gazette*, and *State House News Service*.

Promoting Tax Fairness

State tax policy plays a critical role in helping Massachusetts attract and retain businesses that will expand the revenue base, provide jobs, and generate economic growth. That was the important message Pioneer Institute reinforced through its participation in the Tax Fairness Commission, a group of 15 elected officials, policymakers and non-profit leaders appointed by the state legislature to develop more tax policy reforms.

Pioneer used its participation on the commission to recommend measures that will strengthen Massachusetts’ competitive edge, and challenge those, such as enactment of a graduated income tax, that would jeopardize job creation and economic growth. Pioneer presented recommendations to the commission on unemployment insurance tax reform, tax code simplification, reductions in the corporate and small businesses tax rates and the Minimum Corporate Excise Tax, and adoption of a more expansive research and development tax credit. In July, the state legislature approved the expansion of R&D tax credits as part of a broader economic development bill.



A TRUSTED RESOURCE

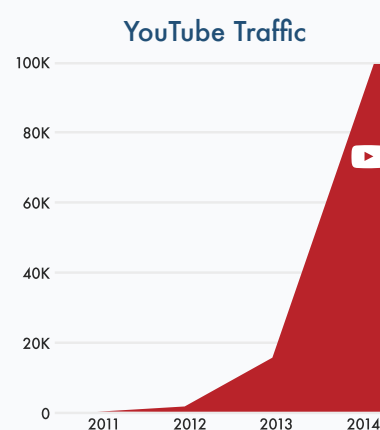
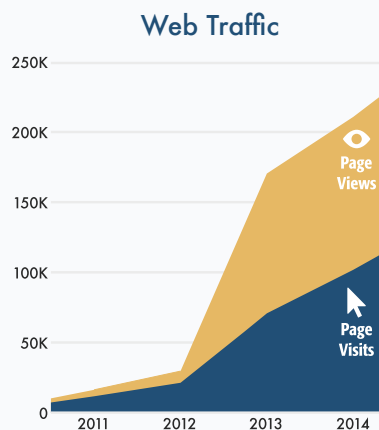
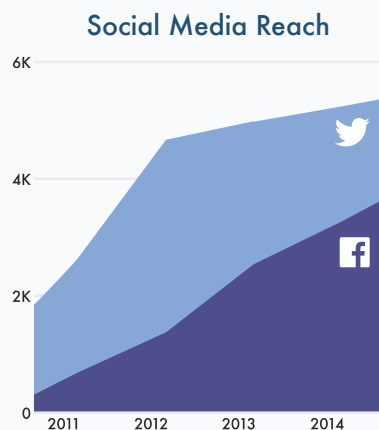
When print, television and radio news outlets in the Greater Boston market want a voice they can trust for commentary on the most pressing topics of the day, they call on Pioneer. Whether the issue is wasteful government spending, public safety, MBTA performance and costs, and many other policy areas impacting Massachusetts residents, editors, reporters and producers know they can count on our experts for credible analysis informed by solid data and decades of experience. Jim Stergios appears regularly on WBUR's RadioBoston, and has a column in *The Boston Globe*. Jim, Greg Sullivan and Mary Connaughton have been interviewed dozens of times on *WBZ*, *WCVB*, *Fox 25*, *NECN*, *WRKO*, *WGBH*, and *WBUR*. In education and healthcare, Jamie Gass and Josh Archambault were fea-

tured over a thousand times in outlets with state and national reach, from *State House News Service*, the *Boston Herald*, and the *Lowell Sun*, to the *Associated Press*, the *Wall Street Journal*, and *Politico*.

“Four years ago, when 44 states had adopted the K-12 curriculum standards, the whole thing seemed quiet and inevitable. Today, resistance is everywhere. Some states are now dropping out. Chalk it up to a big victory for a small think tank on Devonshire Street.”

– Joanna Weiss, *The Boston Globe*

Pioneer recognizes that publishing research is not enough — making a lasting impact on public policy requires promoting our key findings through traditional and digital media platforms. In 2013-14, Pioneer appeared in print and on the air nearly 2,000 times, and published over 102 blog entries drawing over 100,000 website visitors. Through Twitter, Facebook, YouTube, LinkedIn, Reddit, we are spreading our message to more readers than ever before.





"There's a nationwide controversy around Common Core and what it means for kids in the classroom. The standards are mediocre. There's a 30-page instructional practice guide that tells teachers to refrain from teaching historical context because they say it's unfair. They're removing human agency from history."

– Jim Stergios, *Fox & Friends*

"Last year, we saw an eye-opening example of the savings the state might realize without the anti-privatization Pacheco law. It came in the form of a report by former Massachusetts Inspector General Gregory Sullivan, now research director at the Pioneer Institute, about the MBTA's high bus-maintenance costs."

– Scot Lehigh, *The Boston Globe*

"You know that discomfort and even outright opposition has reached a critical mass when the Common Core becomes a frequent punch line in the repertoire of late-night comedians."

– Jim Stergios, *Politico*

"The administration wants 7 million people signed up for the Affordable Care Act by March 31st of next year. We are currently at 200,000 who have picked a plan, not even have paid for the plan. So you can see that wide gap."

– Josh Archambault, *NECN*

"The tragic case of child abuse in Fitchburg and mismanagement by the Department of Children and Families goes all the way to the top."

– Greg Sullivan, *Fox 25*



"Children should be able to read classic poetry and literature. They're the kinds of texts and books that teach us about the stories that make us human."

– Jamie Gass, *ABC 6 News Ohio*



"Much of the public exposure on the [Health Connector website] delays and cost overruns has been produced by Pioneer Institute. It has assiduously outlined flaws in the project management and has provided the press and the public with material that raised serious questions about the competence of the state administration in this arena."

– Paul Levy, *Not Running a Hospital*



"Massachusetts' decision to scrap its healthcare website should leave taxpayers and policymakers scratching their heads and wondering about the lack of accountability, government management and procurement."

– Josh Archambault, *Forbes*



Since 2013, Pioneer's Jim Stergios has been a regular contributor to RadioBoston's Week in Review on WBUR, Boston's NPR affiliate, joining media personalities to offer commentary on timely events in public affairs and policy.



A SHARED SENSE OF PURPOSE

Pioneer Institute's supporters share a passionate commitment to a world-class education for all schoolchildren, affordable healthcare, a prosperous economy and a government that upholds the public trust. Our core supporters, those who contribute at the membership level, include leaders in the fields of business, law, healthcare, academia, and non-profit management. We bring them together for policy briefings and networking opportunities at exclusive events.

Each year, Pioneer Institute holds three signature gatherings: the Hewitt Healthcare Lecture, the Better Government Competition Awards Gala, and the Lovett C. Peters Lecture in Public Policy.

The **Hewitt Healthcare Lecture** capitalizes on Boston's homegrown medical industry talent, convening thought leaders and practitioners in the fields of medicine, research, business, and academia for informative presentations and moderated panel discussions featuring national experts. Past speakers include Dr. Robert S. Kaplan; Dr. Don Berwick; Charlie Baker, Jr.; Avik Roy; David Cutler; Jim Capretta; Dr. Regina Herzlinger; Dr. Douglas Holtz-Eakin; and Dr. Jonathan Gruber.

Pioneer's **Better Government Competition Awards Gala**, now in its 24th year, showcases the most innovative ideas from across the country. Keynote speakers in recent years have included former Boston Police Commissioner Edward Davis, Boston Mayor Martin Walsh, financial publisher Steve Forbes, national political commentator Michael Barone, Texas Governor and former presidential candidate Rick Perry, former Washington, D.C. Schools Chancellor Michelle Rhee, and many more.

The **Lovett C. Peters Lecture** in Public Policy, named in honor of Pioneer Institute's founder and long-time Chairman Lovett C. Peters, was established to show our gratitude to our most loyal supporters by bringing them together for one night a year to honor individuals of vision whose accomplishments have made a significant impact on society. Past honorees include: Success Academy Charter Schools CEO Eva Moskowitz; Harvard historian Niall Ferguson; medical researcher Deepak Srivastava, virtual education innovator Sal Khan, former Florida Governor Jeb Bush, former Newark Mayor Cory Booker, and X Prize Founder Peter Diamandis.



Stephen and Elizabeth Fantone, Steven Akin, Ted Alfond and John Remondi



Member Events

DEC
9
2013

Member Luncheon

"A Tale of Two Cities: The Boston and New York Elections," with former *Boston Globe* Editorial Page Editor Peter Canellos and Manhattan Institute Scholar Nicole Gelinas

JAN
23
2014

Movie Screening

"The Ticket: The Many Faces of School Choice," which explores different models of school choice across the country. The film was followed by a panel discussion on alternatives to public education in Massachusetts.

FEB
4
2014

Members' Reception Co-Sponsored with the Federalist Society

"Terms of Engagement: How Our Courts Should Enforce the Constitution's Promise of Limited Government" with Institute for Justice Senior Attorney Clark Neily

FEB
18
2014

Member Luncheon

"Choice and Competition in India's Schools," featuring Parth Shah, founder and president of the Centre for Civil Society, a non-profit think tank in New Delhi that promotes school choice.

SEP
23
2014

RealClear Radio Hour Live Taping

"Why Are Boston Charter Schools So Effective?" with host Bill Frezza and Match Education CEO Stig Leschly



1 L-R Gary Kearney, Eva Moskowitz, Alfred and Pat Houston, Jim Stergios;
2 L-R John and Jean Kingston, Cathy Fair
3 L-R Holly and Bruce Johnstone

Throughout the year, Pioneer Institute fosters civic engagement in Boston by hosting free educational forums with Pulitzer Prize-winning authors, renowned scholars, and roundtable discussions featuring experts with diverse points of view.

Pioneer members receive exclusive invitations to quarterly breakfasts, luncheons, and cocktail receptions at some of Boston's most reputable venues, featuring experts on a broad range of social, and cultural topics. Pioneer's 2013-14 member events series featured stimulating presentations on the New York City mayoral election, judicial activism, school choice in India, and more.

The "Pioneer New Leaders" program is a network of younger professionals who share the Institute's commitment to making an impact on Massachusetts public policy. New Leaders are welcome to attend the members lecture series and signature events.



“CHILDREN CAN’T WAIT: WHY AMERICA MUST ADDRESS ITS FAILING SCHOOLS CRISIS NOW”

In December, Pioneer hosted its 17th annual Lovett C. Peters Lecture, honoring nationally recognized charter school leader Eva Moskowitz. Ms. Moskowitz is founder and CEO of the Success Academy Charter Schools, New York City’s highest-performing charter management organization.

Her presentation, “Children Can’t Wait: Why America Must Address Its Failing Schools Crisis Now,” described Success Academy’s focus on “joyful rigor,” a curriculum that combines high standards and engaging learning, and the network’s phenomenal growth since 2006. Success Academy now includes 32 schools serving more than 9,000 primarily high-poverty, minority children. Success Academy schools rank in the top one percent of all New York State public schools in math and in the top three percent in English language arts.

Her organization mobilized over 20,000 parents, teachers and students to march across the Brooklyn Bridge in support of charters. Her public battle against Mayor DiBlasio last year led to enactment of a law protecting charter schools’ right to publicly-funded classroom space. Her presentation was a powerful call to action reminding Pioneer supporters of the Institute’s important work to promote public awareness of the benefits of charter schools and school choice.

The Peters Lecture, named for Pioneer Institute’s founder and long-time Chairman Lovett C. Peters, is one of Pioneer’s signature events. The elegant occasion is the

“We’re not in this for the charters. We are in this for the children and their ability to get access to opportunity. We can be successful, but there has to be a political strategy. And we have to hold elected officials accountable for delivering better options for kids.”

– Eva Moskowitz





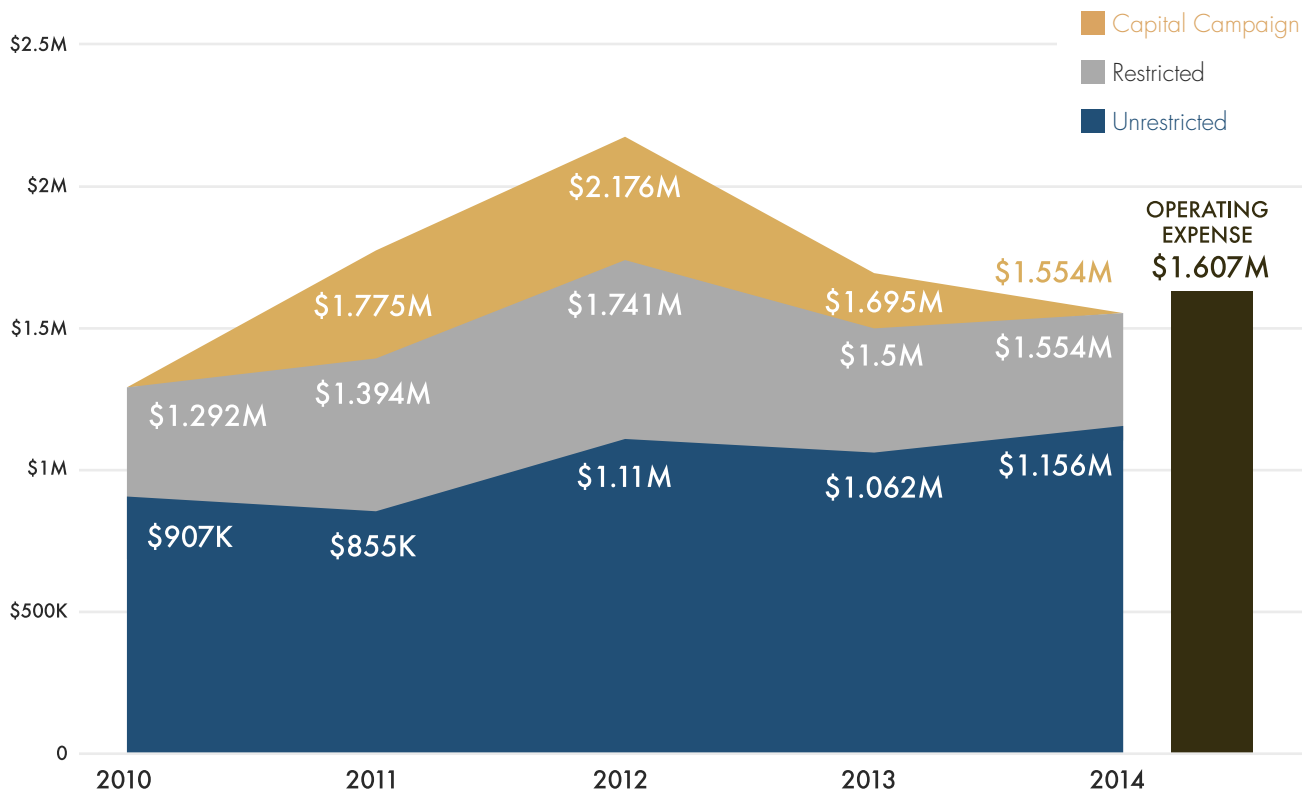
Institute's special way of thanking our most loyal supporters, by gathering them together to recognize individuals of vision. Eva's inspirational leadership exemplifies Pete's mission to inform and enrich intellectual debate, and support high-quality educational opportunity for all children.

Past honorees have included innovative thought leaders who are advancing the public discourse on key issues, including Sal Khan, Peter Diamandis, Gov. Jeb Bush, and Senator Cory Booker.

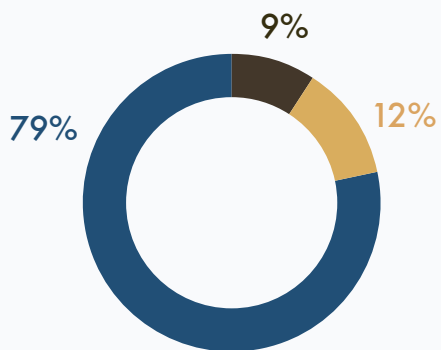
- 1 L-R Richard Bower, Anthony Morris, Jim Stergios
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REVENUE

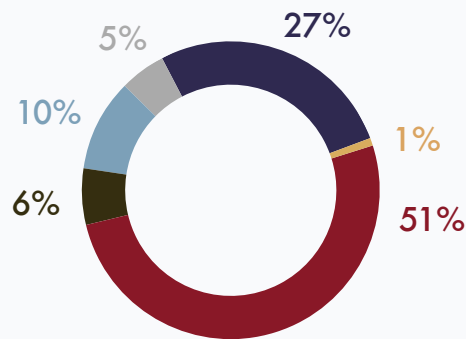


Operating Expenses by Category



- Operations
- Development
- Research & Programs

Operating Expenses by Program Area



- Better Government
- Urban Redevelopment
- School Reform
- Lovett C. Peters Lecture
- Healthcare
- Economic Opportunity

Revenues & Expenses

Revenue	
Unrestricted Donations	\$1,129,542
In-Kind Donations	17,500
Restricted Donations	398,489
Other Revenue	7,981
Total Revenue	1,553,512
Expense	
Employment Costs	862,142
Outside Service	47,083
Research	224,097
Printing & Publishing	49,807
Distribution Costs	35,795
Events & Meetings	228,969
Staff Business Expenses	28,648
Office Operations	113,447
Internet/Website	17,501
Total Expenses	1,607,489
Other Income	69,86
Other Expenses	48,064
Increase in Net Assets	\$(32,180)

Financial Position

Assets	
Cash	\$320,423
Contributions Receivable	227,839
Investments	1,133,935
Property & Equipment	979,601
Other Assets	57,971
Total Assets	\$2,719,769
Liabilities & Equity	
Accounts Payable & Other Accrued Expenses	73,721
Total Liabilities	\$73,721
Net Assets	
Unrestricted Funds	1,960,400
Temporarily Restricted Funds	235,150
Permanently Restricted Funds	450,498
Total Equity	2,646,048
Total Liabilities & Equity	\$2,719,769

More Events



1 L-R Front Row John Remondi, Holly Johnstone, Edward Bousa, George Domolky, Vivian Spiro
L-R Back Row Susan Domolky, Lionel Spiro, Maureen Bousa, C. Bruce Johnstone

2 L-R Holly and Bruce Johnstone

3 L-R Stephanie Zaremba, Caitlin Reiche, Dan Haley, Josh Archambault, Mary Connaughton

4 L-R Dan Peters and Eva Moskowitz





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Senior Fellows on Healthcare



Barbara Anthony is advancing healthcare price and quality transparency at Pioneer. A well-known consumer advocate, she is also Senior Fellow at the Harvard Kennedy School. She was Massachusetts Undersecretary of the Office of Consumer Affairs and Business Regulation from 2009 to 2015, and previously served with the Federal Trade Commission, the Massachusetts Attorney General's Office, and the U.S. Justice Department.



Joshua Archambault focuses on the implementation of healthcare reform in Massachusetts, and promotes patient empowerment and access to high-quality, affordable care. Previously, he was a Health Policy Fellow at the Heritage Foundation, Legislative Director in the State Senate, and Senior Legislative Aide in the Governor's Office.



Thomas Birmingham is involved in Pioneer's initiatives on academic standards, U.S. History and Civics, and vocational-technical education. He was previously the Executive Director of Citizen Schools Massachusetts and Senior Counsel with Edwards Wildman Palmer LLP. In the Massachusetts State Senate, he served as co-chair of the Joint Committee on Education, Chairman of the Senate Committee on Ways and Means, and Senate President. He was an architect of the landmark 1993 Education Reform Act.



Amy Lischko is Associate Professor at Tufts University School of Medicine. Amy has over fifteen years of experience working for the Commonwealth of Massachusetts in senior-level management positions, including Director of Healthcare Policy and Commissioner of the Division of Healthcare Policy and Finance.



Senior Fellows on Education



Katherine Apfelbaum provides project assistance to Pioneer's Center for School Reform. She earned a master's degree in comparative social policy at the University of Oxford, and previously conducted charter school and parent trigger research in New York.



Cara Stillings Candal is an education researcher and writer. She is senior consultant for curriculum and content at the Center for Better Schools/National Academy of Advanced Teacher Education, and an adjunct professor at the Boston University School of Education.



Bruce Wykes is supporting Pioneer's research on school choice and academic standards. He earned master's degrees at Hillsdale College and the University of Texas at Austin, and a bachelor's degree from the University of Guam. He is an Air Force veteran.



Senior Fellow on Finance



Iliya Atanasov 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 Media Fellow



Charles Chieppo provides policy writing and editing services and strategic advice on media relations. He is the principal of Chieppo Strategies, and research fellow at the Harvard Kennedy School's Ash Center. Previously, he was policy director in Massachusetts' Executive Office for Administration and Finance and directed Pioneer's Shamie Center for Restructuring Government.



Senior Fellow in Law and Policy



John Sivoletta is helping Pioneer establish its new public-interest law initiative, PioneerLegal. He teaches and is a senior-thesis advisor at Columbia University, where he earned a Ph.D. in Political Science.



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“Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it’s the only thing that ever has.”

– Margaret Mead



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