



# PLAY FAIR

&

# RISE



PIONEER INSTITUTE  
PUBLIC POLICY RESEARCH

2015 Annual Report





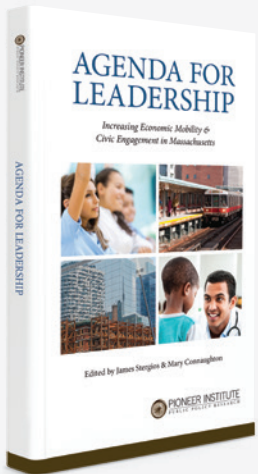


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# BY THE NUMBERS



## 38 Publications

research papers,  
policy briefs, testimony,  
and event transcripts



## 2,181 Media Hits

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

## 88 Attendees

average per Pioneer event



## 63 Events

featuring Pioneer

## Board of Directors

### Officers

Stephen Fantone, *Chairman*  
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C. Bruce Johnstone, *Vice-Chair*  
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Figures reflect Pioneer's 2015 fiscal year: October 1, 2014 through September 30, 2015



# FAIR PLAY, LIBERTY & PROSPERITY

Pioneer's value in advancing public discourse is encapsulated in words Benjamin Franklin wrote in 1731: "When truth and error have fair play, the former is always an overmatch for the latter."

In 2015, the Institute's data-driven arguments have overmatched a number of ill-considered policies: ending a misguided billion-dollar convention center expansion, reclaiming state control over key education policies, inspiring MBTA reform, fixing the state's Health Connector, and helping stem the abuse of children under state supervision.

Dollar for dollar there are few civic organizations with the same scale of impact. Pioneer's growing influence comes from a Franklin-esque obsession with self-improvement. Each year we have raised the bar on every measure of public engagement, including reports and online tools released, books sold, publications and blog views, traditional media placements, social media presence, supporters, fundraising, and more.

Pioneer's 2015 Annual Report showcases an organization with greater reach, a deeper bench of talent, and an even more targeted mission.



Jim Stergios  
Executive Director

Stephen D. Fantone  
Chairman

Two handwritten signatures in black ink. The first signature is for Jim Stergios and the second is for Stephen D. Fantone.

The Pioneer Board of Directors' new strategic plan focuses the Institute on ensuring that *fair play* and *opportunities to rise economically and socially* are central to policymaking in Massachusetts.

Franklin once described mankind as falling into "three classes: those that are immovable, those that are movable, and those that move." Sadly, today his words ring true in describing Massachusetts (and U.S.) policies that have left many with no prospect of moving beyond the lowest end of the economic ladder.

We will continue to bring Franklin's famed practicality to the task of making Massa-

*In the spirit of Franklin—  
empirical, practical,  
obsessed with improvement*

chusetts a national leader in the fight to realize the full extent of our citizens' talents, expanding access to excellent schools, affordable and high-quality medical care, transportation, housing and jobs.

We are deeply indebted to you, our supporters, for making this important work possible and for being part of a bold community of reformers that knows ideas are what change our world.

If, as Franklin's famous dictum put it, "Where Liberty dwells, there is my country," then Pioneer is a sturdy home and a worthy investment in the future of fair play, liberty and prosperity in Massachusetts.



# 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's objective is to make Massachusetts the nation's pace-setter when it comes to fair play and economic opportunity, promoting high-quality public schools, affordable healthcare, and effective government through research and public engagement.*



### Center for School Reform

Supports 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

Advocates fair play and opportunity for innovators, job creators, investors, and employees across all industries.

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



# GIVING EVERY CHILD A CHANCE

For too many underprivileged children, the path to college, economic independence, and a fulfilling life is out of reach – but a high-quality education can be a lifeline. At the core of Pioneer’s mission is the conviction that every Massachusetts child deserves the chance to attend a great school, regardless of what form it takes.

Pioneer is working to restore Massachusetts’ high-quality academic standards and assessments, and raise public awareness about all of the excellent options available to families, from charter and vocational-technical schools, to scholarships to independent and parochial schools, and interdistrict programs such as METCO.

In 2015, Pioneer further strengthened its stellar education policy team by recruiting Thomas Birmingham, former President of the state Senate, and co-author of the education reform act, to serve as the Institute’s Distinguished Senior Fellow in Education.

## Meeting the promise of Civil Rights

Charter schools have been the most effective method of improving academic outcomes for underserved students in Massachusetts. Tens of thousands of low-income and minority children who lack the family structures and other supports necessary for classroom success have been able, by attending a charter school, to defy demographic expectations. Research from Harvard, MIT and Stanford has shown that Boston’s charter schools are the best in the country at bridging racial and economic achievement gaps. The impact of a year in a Boston charter school has the equivalent

“In Massachusetts, charter schools are realizing my husband’s dreams. A Stanford University study found that the commonwealth has the nation’s best charters, and that Boston charter schools are doing more to close race- and poverty-based achievement gaps than any other group of public schools in the country.”

– Dr. Sephira Shuttlesworth, widow of Civil Rights leader Reverend Fred Shuttlesworth and director of the Mid-Michigan Leadership Academy, a SABIS network charter public school, was the Keynote Speaker at Pioneer’s February 2015 forum, “Civil Rights: Charter Schools and Teacher Unions”



The Boston Globe

**“Thursday’s forum on ‘Civil Rights, Charter Schools, & Teachers Unions’ was so interesting because it hinted at how the fight will be framed in the next few years.”**

– Scot Lehigh, columnist, *The Boston Globe*

impact of a year spent in one of the city’s elite exam schools, and two years in other district schools.

Despite overwhelming evidence of charters’ success, they still face strong political opposition from education interest groups that keep students trapped in underperforming school systems year after year. As recently as 2014, the Board of Elementary and Secondary Education advanced regulations dramatically *reducing* the number of charter seats available in high-demand areas, and the state Senate rejected an extremely modest charter expansion bill that had been passed by the House. As a result, 37,000 students have been languishing on charter school waitlists.

Pioneer’s multi-year campaign to inform the public about the benefits and impact of charter schools stems from its recognition that a quality public education is not a luxury, but a civil right. Through reports, op-eds, media appearances, print and digital advertising, and public forums, Pioneer has worked to mobilize the business community, media, state policymakers and parents to lift the cap on charter schools and end the regulatory barriers to their growth and autonomy.

At a February education forum on the Civil Rights era that received coverage in *The Boston Globe*, Pioneer organized a spirited public debate exploring the conflicting interests of the teachers union and the largely minority communities often served by charter schools. The Civil Rights narrative took hold, inspiring a statewide ballot initiative and a lawsuit on behalf of five Boston Public School students whose constitutional guarantee of a quality education had been denied. In addition, a bill to lift the cap on the number of charter schools is pending in the state legislature.

## Broadening social mobility for all children

Another proven approach to closing achievement gaps in Massachusetts is the Metropolitan Council for Educational Opportunity (METCO), a program that helps over 3,000 urban students in Boston and Springfield attend high-performing schools in nearly 40 suburbs. METCO’s mostly African-American and Hispanic students outperform their district counterparts on state exams, with graduation rates that are 30 percent higher. The program has a five-year wait list of 8,000 students, but state



funding has decreased over the past decade. In a report covered by *WBUR*, *WBZ*, *The Boston Globe*, and *WGBH's "Greater Boston,"* Pioneer called on state leaders to expand the program beyond Boston and Springfield, and increase state funding.

Massachusetts can do much more to help low-income families gain access to the same educational options that affluent parents already enjoy. In two reports, Pioneer demonstrated that private and parochial school vouchers worth up to \$8,000 per year could be offered to 10,000 students at little or no cost to taxpayers. Under this plan, students desiring to attend the majority of religiously affiliated Massachusetts K–12 schools could do so, even while freeing up additional resources for public schools. Pioneer promoted this proposal and the benefits of voucher programs through op-eds, appearances on radio and TV, and an event on Catholic schooling that received coverage in the *Boston Herald*.

Ensuring that high school graduates are ready for today's jobs requires increasing students' access to proven options such as vocational-technical education, which successfully integrates academic and trade skills in the Bay State. In a study released at a policy forum and featured in the *Springfield Republican*, the *Boston Business Journal*, and *WBUR*, Pioneer called on state leaders to meet the growing demand for voc-tech programs, especially in municipalities not currently served.

Pioneer experts estimated that the cost to provide the 5,000 additional seats needed to accommodate voc-techs' current waitlist is approximately \$20 million per year, or 0.5 percent of state spending on K-12 education, a wise investment given their record of improving MCAS performance, dropout rates, and academic achievement for special needs students. In a 2015 report covered by the *Springfield Republican*, Pioneer highlighted collaborations between vocational schools

## Our fight to give all kids access to excellent schools continues...

As the education reform debate heats up on Beacon Hill, Pioneer will be a leading voice, promoting the benefits of charter schools through research, videos, and digital and traditional marketing such as bus ads and billboards across the state. Support our education reform initiatives at this pivotal time in Massachusetts.

**Help us keep driving the conversation — please consider a financial contribution today.**



## A Troubled History: The Story of How Bigotry Limits School Choice in America

The Blaine Amendments of 1875 restrict government funding from flowing to religiously affiliated organizations (including parochial schools) in 38 out of 50 states. In Massachusetts, these amendments impact more than 100,000 urban children in underperforming districts.



We're working on a powerful documentary to tell the story of how persecution and violence directed at Catholics by Know-Nothing mobs during the 1840s and 1850s severely limits parental choice to this day. Please join us in this campaign.

By supporting "I Know Nothing: The Story of How Bigotry Limits School Choice in America," you will join a grassroots network of individuals committed to excellence in education — the true path toward future prosperity.

**Make your contribution today!**

"We could be doing a lot more for deserving families in our cities who can't afford the tuition costs at some of our Catholic schools. All kids deserve a great education — whether it's in a public or private school — and a forum in Boston hosted by Pioneer Institute, a leading research center, celebrated the progress that's being made, especially in Catholic schools."

— Raymond Flynn, former Ambassador to the Vatican and three-term Boston Mayor, in the *Boston Herald*. Flynn was a featured speaker at a July 2015 Pioneer forum, "Know-Nothings' Nativism, Catholic Education and School Choice."



**Donate at [pioneerinstitute.org/get-involved/](http://pioneerinstitute.org/get-involved/)**

and manufacturers and small businesses around the state. The Massachusetts Governor recently announced that he will seek additional state funding for vocational education as part of a new initiative to close the "skills gap."

### Charting an independent course for high standards

To keep America competitive in the global economy, all schoolchildren must receive an education rich in the liberal arts and rigorous science, technology, engineering and math content. Massachusetts' K-12 curriculum standards and assessment system (MCAS), developed after passage of the landmark 1993 education reform act, propelled Bay State students to the top on national performance rankings, while in-depth analysis has shown that the federal standards known as Common Core



dramatically weaken the quality of classroom instruction. That's why Pioneer has waged a five-year battle to restore state control over its academic standards and tests.

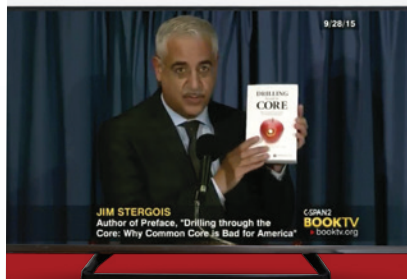
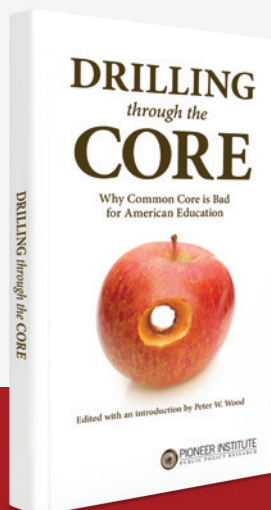
Pioneer raised important questions about the wisdom of tying Massachusetts to the Common Core-aligned testing consortium, PARCC, the membership of which has dwindled to a handful of mostly low-performing states and the District of Columbia. With a new gubernatorial administration, a ballot initiative to repeal Common Core, and education board hearings around the state on whether to replace MCAS with PARCC, Pioneer redoubled its outreach to media, policymakers, and the public to win editorial support and build the case for retaining MCAS.

A major victory was achieved for the Commonwealth's 950,000 K-12 students when the new governor announced support for an independent state-based assessment, influencing a Massachusetts Board of Education vote in November 2015 to reject PARCC in favor of an improved MCAS. The decision prompted national coverage of Pioneer's analysis in *The New York Times*, *PBS Newshour*, *NPR* and other outlets.

Pioneer also continued to lead the national debate over Common Core with the publication of the book, *Drilling through the Core: Why Common Core is Bad for American Education*, a one-volume compilation of the Institute's comprehensive research on this topic. The Institute's long battle is not over, but with the national testing consortia no longer viable and new energy in many states to write their own standards, we have made significant progress.

## *Drilling through the Core: Why Common Core is Bad for American Education*

Pioneer Institute's new book on Common Core national education standards puts the research that framed the ongoing national debate into a single volume. Edited and with an introduction by National Association of Scholars President Peter W. Wood, this timely new book features contributions by some of the country's top education scholars.



“...Pioneer has been at the forefront of the discussion with thoughtful critiques on every aspect, from the notion of common standards, to the specific standards as written, and the process by which they were adopted. This book is a valuable resource for parents or anyone else who wants to understand the criticisms of Common Core.”

– U.S. Senator Charles Grassley

Available on Amazon.com  
**GET YOURS TODAY!**

## Tom Birmingham, Distinguished Senior Fellow in Education at Pioneer Institute, and Former President of the Massachusetts Senate

As Pioneer Institute's new Distinguished Senior Education Fellow, former Massachusetts Senate President Tom Birmingham is lending his powerful voice to education reform in Massachusetts. In 2015, he met with the Governor, Education Secretary, policymakers, and coalitions of teachers and administrators in U.S. History and vocational education.

He also advanced the case for state-based standards and assessments in visits with editorial boards, columnists and reporters at *The New York Times*, *The Boston Globe*, *The MetroWest Daily News*, *The Lowell Sun*, *The Patriot Ledger*, the *Springfield Republican*, the *Worcester Telegram & Gazette*, *Bay State Parent*, and more. Tom's op-eds have appeared in these and other regional news outlets, and he has been interviewed on talk radio and regional television programs around the state. He was a featured speaker at four Pioneer forums, one of which aired on C-SPAN.

"Perhaps the most precious gift in a young life is opportunity, and the key to opportunity is a good education. That was my personal experience. I attended the Chelsea schools and went on to receive an education that transformed my life. When I entered the Massachusetts Senate, I believed all our kids deserved this type of opportunity. That was the guiding principle when I wrote the Education Reform Act of 1993.

Pioneer Institute has long been an advocate for school accountability, high-quality classroom content, and better choices for all families. I'm proud to join in that effort."



## Preparing our next generation of citizens

To participate fully in America's civic life, future generations must be well informed about our nation's founding principles, major institutions, and key figures and events. Too many high school students graduate without this important foundation, in great part because the Commonwealth's Department of Elementary and Secondary Education has failed to implement the 1993 education reform act's call for an MCAS test for U.S. History.

In Massachusetts, Pioneer has been working to restore history to its rightful place as a fundamental priority in our K-12 public schools, by raising awareness about the need

## Promoting U.S. History Instruction: The Frederick Douglass Prize

Pioneer's second annual Frederick Douglass U.S. History Essay Contest for Massachusetts high school students encouraged students to choose from dozens of historic sites across the Commonwealth, and submit an essay exploring their significance. Awards were presented to finalists at a Pioneer public forum on World War II that was televised on C-SPAN. The first place prize winner was, Julia Ruderman, of Minuteman Career and Technical High School for her essay on the Old Schwamb Mill in Arlington.

### SPREAD THE WORD!

The 2015–16 essay contest is focused on the many technological innovations developed in Massachusetts, from the sewing machine to the computer.

**Learn more, and consider making a gift to support our U.S. History initiative: visit <http://acommon-sense.org/>**



*Minuteman student Julia Ruderman prepared for her 3,200-word essay on the Old Schwamb Mill, the nation's oldest continuously operating mill site, by researching archival records at the Arlington Public Library and interviewing mill employees.*

for high-quality instruction, and instilling a sense of urgency among educators, policy-makers and parents. To broaden support for restoring U.S. History, Pioneer has built relationships with networks of social studies teachers, civic organizations, and representatives from museums and other historical societies across the Commonwealth. As part of this effort, Pioneer held its second annual statewide student history essay contest, attracting nearly 70 submissions. Center for School Reform director Jamie Gass authored op-eds on key figures and events in America's past that appeared in news outlets across the state, and hosted forums with Pulitzer Prize-winning historians to educate the public. Gass was honored by the Massachusetts Council for the Social Studies at its annual awards ceremony.

Last year, Pioneer secured a written commitment by the major gubernatorial candidates, including Governor Baker, to reinstate the U.S. History MCAS test as a graduation requirement, and the state legislature held a hearing on several bills to increase civics knowledge among Massachusetts students.



**[pioneerinstitute.org/  
us-history-instruction/](http://pioneerinstitute.org/us-history-instruction/)**

**Visit us to learn more about our many history forums**

featuring Pulitzer Prize-winning authors including Gordon Wood, James McPherson, Rick Atkinson, Edmund Morris, Diane McWhorter, Taylor Branch and many others.

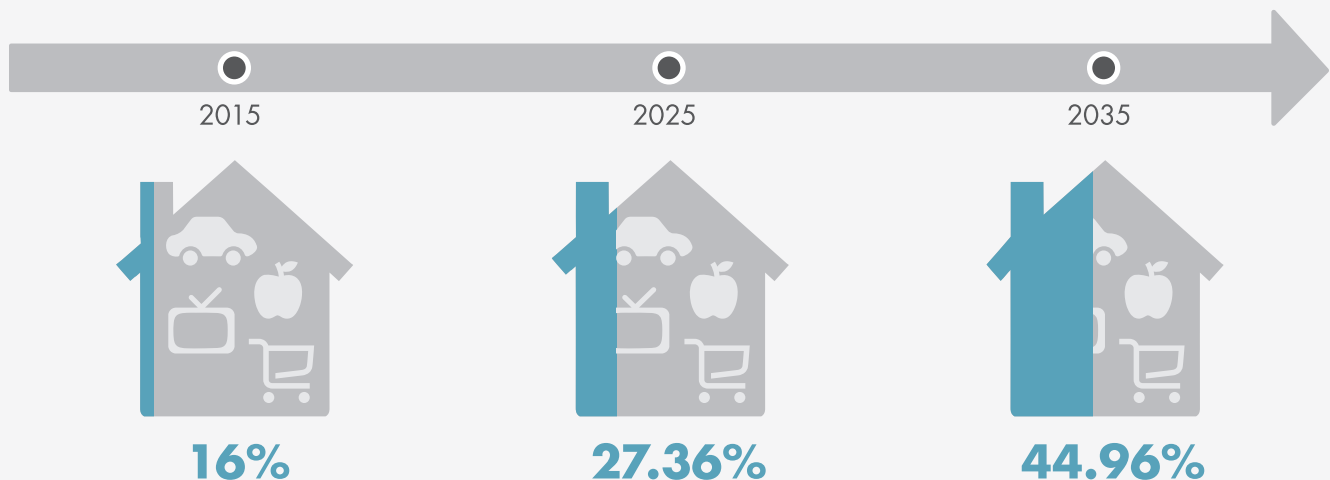


# IMPROVING PATIENT VALUE AND PUBLIC ACCOUNTABILITY

In 2015, a national conversation gained center stage around the unaffordability of healthcare for average consumers. Study after study showed the skyrocketing growth of high-deductible plans and out-of-pocket spending, and the growing impact on American families. The cost of employer-sponsored health insurance and employee contributions to those plans continued to rise much faster than incomes. In a 2015 survey, the Commonwealth Fund found that one-quarter of privately insured individuals bear high cost burdens relative to their incomes. In Massachusetts, data published by the Center for Health Information and Analysis shows that one in five families spent \$3,000 or more out-of-pocket for healthcare in 2014. Across the nation, the uninsured population has fallen significantly, but the fact remains that annual out-of-pocket costs for an individual can reach \$6,600 per year and exceed \$13,000 for a family. In the Bay State and across much of the country, it is nearly impossible or impracticable for the average healthcare consumer to obtain information on the cost of healthcare procedures beforehand.

## Healthcare Costs Over Medium Household Income

8% Annual Increases in Out-of-Pocket Costs



## THE WALL STREET JOURNAL

**“ [T]he best autopsy of the connector mess is being published Monday by Boston’s Pioneer Institute think tank, where Josh Archambault reviews internal audits and whistleblower testimony he obtained. The evidence is damaging to both Massachusetts’s exchange contractor, CGI Corp., and the administration of former Democratic Governor Deval Patrick.”**

– Wall Street Journal editorial board

Pioneer’s 2015 healthcare initiatives focused on urgently addressing the state’s broken health insurance exchange and empowering Massachusetts consumers through price and quality transparency. Pioneer tapped well-known consumer advocate Barbara Anthony to drive this important debate as the Institute’s new Senior Fellow in Healthcare. Barbara brings decades of expertise in government and public policy, most recently as Massachusetts Undersecretary of the Office of Consumer Affairs & Business Regulation.

## Fixing the Connector

Governor Charlie Baker cited the Massachusetts Health Connector as a major factor in the state’s \$1.5 billion 2015 budget deficit. Poor design and procurement of the state’s Affordable Care Act-compliant health exchange website in 2013 and 2014 led to rampant technological malfunctions and the placement of nearly 350,000 Massachusetts residents in a transitional Medicaid program without determining their income eligibility. As a result, MassHealth spending jumped 19%, after a 5% increase the previous year.

In a series outlining a bold new healthcare agenda for the incoming gubernatorial administration, Pioneer proposed a Medicaid verification system to address the Health Connector cost overruns and ensure that free care would be reserved for the truly needy. The new administration implemented the recommendation, identifying 200,000 ineligible enrollees, and saving taxpayers over \$250 million. Another Pioneer proposal, an overhaul of the Health Connector Board, gained traction in February, when the administration forced the resignations of nearly half the members.

The Institute’s multi-year campaign to bring greater scrutiny to the impact of problems with the Health Connector website culminated in a federal investigation. Pioneer uncovered information from whistleblowers and audits revealing that certain state officials in the previous administration knew the website was off track for more than a year before its troubled launch. Project leaders failed to hold the contractor accountable for substandard technology work, and misled the federal government and other stakeholders about their progress. The project is under review by the FBI and U.S. Attorney’s Office, which subpoenaed Health Connector documents dating back to

“There’s not a culture of price transparency in Massachusetts hospitals. It’s really tough for an ordinary consumer to find out the price of a simple procedure ahead of time. We have to stop regarding the price of healthcare as some kind of state secret — it isn’t.”

– Barbara Anthony, Pioneer Institute Senior Fellow in Healthcare, on *WCVB-TV 5 Investigates*



2010. Pioneer’s report garnered coverage in *The Wall Street Journal*, the *Associated Press*, *CBS-Boston*, *WCVB-TV*, *The Boston Globe*, the *Boston Herald*, *WBUR*, *State House News Service*, *NECN*, *WRKO*, *Boston Business Journal*, *MassLive*, *Real Clear Radio*, and a nationally syndicated column by Michelle Malkin.

## An X-Ray on Healthcare Pricing

As high-deductible insurance plans and other out-of-pocket expenses are consuming an increasing share of American families’ household income, basic information about the cost of medical services remains elusive. Greater transparency is one of the keys to reducing this growing cost burden. No market can function properly allocating scarce resources appropriately unless buyers have basic information about price. This is especially true in healthcare, where pricing information continues to be shrouded in secrecy.

Pioneer Senior Fellow in Healthcare Barbara Anthony conducted a series of research surveys of Massachusetts hospitals, physician specialists and dentists to determine responsiveness to inquiries about the price of specific services. She found that there institutions barely comply with a state law that requires making reliable estimates for medical procedures available to the public within two business days. The secrecy surrounding prices contributes to the large fluctuation in costs for the same services, ranging from hundreds of dollars to several thousand. Pioneer found that it is a daunting task for the average consumer to navigate complex institutional systems in order to obtain a price quote. Moreover, there is little, if any, online guidance for consumers. Barbara’s research revealed that most providers have not adopted procedures or protocols, nor have they trained staff to give out price information to consumers. Pioneer’s reports offer detailed recommendations that hospitals and medical practices can adopt to develop a customer-service culture that provides value for patients. The reports concluded that most consumers would simply give up the quest for information, as the time and obstacles involved deterred additional price shopping.

Massachusetts does have state laws in place that are relatively non-prescriptive, that direct providers and insurers to make price data available to consumers, but the laws



have not been enforced even though they have been in effect since 2013. To build public awareness and support for greater transparency, Pioneer promoted Barbara's findings to state and national news outlets. Interviews and news stories citing her analysis have appeared in *The Washington Post*, *The Boston Globe*, the *Boston Herald*, *Commonwealth Magazine*, *WCVB-TV 5 Investigates*, *WBUR*, *The Springfield Republican*, the *Boston Business Journal*, *WBZ 1030*, *Becker's Healthcare*, and *Fox 25*. The coverage has had a ripple effect, generating media interest in the costs of a wide array of medical procedures.

Pioneer continues to advocate with state administrators over this issue as well as to build alliances with other public policy groups and healthcare industry organizations that foster transparency as well.

## HEWITT HEALTHCARE LECTURE

### "Under the Microscope: Advancing Healthcare Value Through Greater Transparency."

Pioneer's 9<sup>th</sup> annual Hewitt Healthcare Lecture assembled nearly 200 of Greater Boston's top medical practitioners, professionals, researchers, and providers to hear featured speaker, Dr. Robert S. Kaplan, a leading expert on how institutions can more effectively measure clinical outcomes and costs, and achieve more transparent pricing.

At the event, Dr. Kaplan discussed the importance of introducing more information-sharing on medical conditions and outcomes, to compare performance and identify learning opportunities. He also encouraged better communication between clinical personnel and healthcare administrators regarding costs, and use of bundled payment reimbursement approaches. The 2015 lecture was moderated by *WBZ-TV* news' political analyst, Jon Keller, host of "Keller @ Large."

Dr. Kaplan is the Marvin Bower Professor of Leadership Development, *emeritus* at the Harvard Business School. He has authored or co-authored 14 books, 20 Harvard Business Review articles, and

"The central goal in healthcare must be value for patients, not access, volume, convenience, quality or cost containment... Providing prices without providing outcomes is not helping us at all in making informed choices."

– Robert S. Kaplan, 2015 Hewitt Healthcare Lecturer



## NEW THIS YEAR!

Pioneer invited Hewitt Lecture corporate sponsors to participate in an interactive exhibit during the reception, providing attendees an opportunity to view and compare online products and services at information stations.

**To learn more about corporate and individual sponsorship opportunities for our upcoming Hewitt Healthcare Lecture, please contact Kathryn McCarron, Chief Development Officer**



more than 150 research papers, and he is the recipient of several awards in management accounting. Dr. Kaplan and his frequent co-author, Dr. Michael Porter, have led discussions on strategic performance measurement.

Past Hewitt events have focused on the Affordable Care Act, Medicare and Medicaid reform, and cost control, with speakers such as Regina Herzlinger, Jeffrey Flier, Jonathan Gruber, Donald Berwick, Avik Roy, and many more.

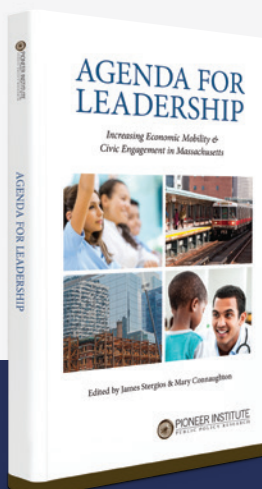
- ① Mary Z. Connaughton, Chuck Hewitt, Teak Hewitt, Kathryn McCarron;
- ② Colleen Manna, Danielle McCourt, Katherine and Samuel Schweitzer, and Wai-chi Mok;
- ③ Barbara Anthony, Spence Papke

# SETTING A BOLD NEW AGENDA FOR LEADERSHIP

With the inauguration of a new governor and legislature came an opportunity to set a bold new course for Massachusetts. Pioneer challenged the commonwealth's new leaders to help the Bay State become a national leader in social mobility, by providing a platform to help more of the state's residents rise up the economic ladder. The Institute published a book, *Agenda for Leadership: Increasing Economic Mobility and Civic Engagement in Massachusetts*, outlining research-based recommendations to reform state education, healthcare, and economic development policies, as well as the delivery of public services. Co-editors Jim Stergios and Mary Connaughton promoted it on *WBUR's Radio Boston*, on local access television, and through an informational video that received nearly 9,000 YouTube and Facebook views, as well as a multitude of speaking engagements at community forums around the state. Many of the book's agenda items have already been enacted or championed by legislators and administration officials.

## Next Stop: A First-Class Transit System

For the commonwealth's 1.3 million MBTA commuters, thousands of their employers, and the region's economic and environmental future, predictable, high-quality service is a necessity, not a privilege. Last winter, after a record-breaking snowfall shut down the MBTA and left thousands of riders stranded on platforms, Pioneer Institute was



## *Agenda for Leadership*

*Agenda for Leadership* is Pioneer's public policy blueprint to help the commonwealth become a beacon of economic prosperity for all, high-quality schools for every child, wisely managed government agencies that support the truly needy, reliable roads and transit service, affordable healthcare, and fair regulations.

Available on [Amazon.com](https://www.amazon.com)  
**GET YOURS TODAY!**



## Getting the MBTA Back on Track

### We asked you for this...

Pioneer Institute's Board of Directors and our wonderful network of supporters met a crucial MBTA matching gift challenge, donating over \$70,000 in just 2 weeks.

### With your support, we did this...

Pioneer drove the public debate on an issue that impacts the entire region and directly affects the daily lives of 1.3 million riders.

Reports	# of Blogs	Report Downloads	Statement Shares
<b>13</b>	<b>49</b>	<b>2,308</b>	<b>2,467</b>

MBTA Press Release Views	Pioneer's #MBTA Impressions	Engagements
<b>10,791</b>	<b>214,075</b>	<b>2,361</b>

Total circulation of print, radio and TV appearances

**119,957,865**



**To make a gift, please visit [pioneerinstitute.org](http://pioneerinstitute.org)**

the first organization to articulate a meaningful reform plan, which provided thought leadership capable of making a real and lasting impact on the quality of life in Massachusetts.

Pioneer recommended actionable, commonsense improvements to the transit authority's governance, operations, and finances to bring costs under control, increase efficiency, and enhance performance. Jim Stergios, Greg Sullivan, Mary Connaughton and Charles Chieppo drove the debate and generated public support for reform through social and traditional media campaigns, and at public policy forums. Their proposals received coverage and earned editorial endorsements from news outlets across the state, which ultimately earned the backing of legislative leaders and policy-makers on both sides of the aisle – giving the Governor the tools for meaningful change.

In a major victory, the legislature approved Pioneer's proposal to create a Fiscal and Management Control Board to implement an intensive efficiency overhaul at the MBTA, and the Governor appointed Pioneer's former research director to the board. The control board quickly began a probe of the T's procurement and contracting process, infrastructure maintenance backlog, capital planning, debt, operations and other areas. It released a devastating report estimating that the T's operating budget gap will total \$427 million by 2020. In response, Pioneer published three recommendations to address shortfalls and save up to \$122 million per year.



Over the objections of powerful unions, lawmakers also passed Pioneer's recommendation to exempt the MBTA from the Pacheco Law, the nation's most restrictive anti-privatization legislation, after the Institute published a report showing that the law had cost the T \$450 million since 1997. As a result, the T announced plans to explore public-private partnerships to operate to explore allowing private companies to operate more than two dozen low-ridership bus routes.

An important feature of the control board is the authority to review all MBTA contracts, including commuter rail and para-transit service. In a series of blog posts and reports, Pioneer shined a spotlight on commuter rail operator Keolis' poor service and urged the control board to reopen its \$2.7 billion, eight-year contract. The Institute's analysis challenged the often-cited notion that the commuter rail's poor performance is the result of

inadequate funding and outdated transit vehicle inventory. The MBTA has added more miles than any other commuter rail system operating in the nation since 1991, and the T received the most capital funding of any of the nation's 10 largest transit agencies in

The Boston Globe

## "NEW STATE BUDGET BIG DEFEAT FOR LABOR"

The Amalgamated Transit Union and the MBTA Carmens Union launched a campaign attacking Pioneer, with radio and online ads calling the Institute "shark privatizers," and accusing us of seeking to enrich corporate interests through privatization.

In response, Pioneer aired an ad featuring Mary Connaughton on WBZ 1030:



"Like you, I depend on the T to get to work on time and home to my family at night. That didn't happen this winter. Pioneer Institute is promoting ideas to fix the T, like holding Governor Baker accountable for its performance and giving a special board the power to amend the contract with Keolis, the commuter rail operator. We believe competition is a must if we want to get the public the best deal. But the T's unions are fighting changes because they're satisfied with the status quo. We're not. Pioneer Institute and you — together we can fix the T."



## Our extensive research on the T won editorial support from around the state

### Editorials

endorsing Pioneer's MBTA reform campaign appeared in the *Worcester Telegram & Gazette*, the *Boston Herald*, *The Patriot Ledger*, and in columns by *The Boston Globe's* Scot Lehigh and Joan Vennoch.

### TV interviews

on *WGBH's* Greater Boston, *NECN's* Broadside, *Fox 25 Undercover*, and *WBZ's* Keller at Large.

### Radio interviews

on *WBUR RadioBoston*, *WBZ's* Bradley Jay, and *WRKO's* Howie Carr Show.

### Newspaper mentions

*The Boston Globe*, *The Boston Herald*, *Associated Press* and *State House News Service*.

### Op-eds

published in *WGBH News*, *Boston Business Journal*, *Commonwealth Magazine*, *Lawrence Eagle Tribune*, *Salem News*, *The Patriot Ledger*, the *Brockton Enterprise*, the *Fall River Herald News*, the *Taunton Gazette*, the *Gloucester Times*, and *The MetroWest Daily News*.

### Together, we achieved this...

Legislative leaders and the Baker Administration enacted our reforms, establishing a Fiscal and Management Control Board, suspending the Pacheco Law, and making targeted investments in equipment and infrastructure to provide reliable service.



"We have an emergency. For six weeks, we've shut down the region. 1.3 million T riders have been impacted. Businesses and the economy have been affected. We can never let this happen again. It's not worthy of a great state — and we're a great state."

— Jim Stergios on *NECN*

Thank you for helping us work toward a reliable transit system. There's so much more to do.

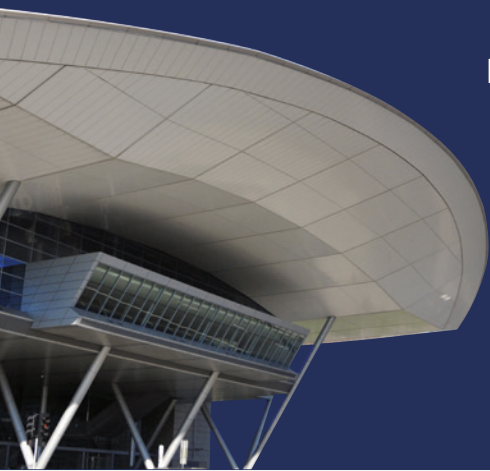
**To make a gift, visit [pioneerinstitute.org](http://pioneerinstitute.org)**

terms of passenger miles traveled and vehicle revenue hours. A study comparing the MBTA commuter rail to its Pennsylvania-based peer concluded that the MBTA's operating expenses have risen higher and faster, without improving performance.

An April Pioneer report on *The Ride* showed that the state could save tens of millions of dollars each year by adopting the operational strategies of other paratransit systems in Massachusetts, and introducing lower-cost private transit vendors such as Lyft, Uber and Bridj. The control board is currently considering these recommendations.

Ensuring an effective transit system will require additional managerial reforms. Pioneer proposals would give the control board final say on





Pioneer also saved taxpayers up to \$1 billion by exposing the Massachusetts Convention Center Authority's inflated claims about the Boston Convention & Exhibition Center's room night performance and economic impact during its bid for expansion. Pioneer's careful scrutiny of its performance relative to projections, covered by the *Boston Business Journal*, *The Boston Globe*, the *Boston Herald*, and *State House News Service*, led the new gubernatorial administration to suspend the bond issuance necessary for the project.

## PioneerLegal

A Pioneer proposal for MBTA reform that has not yet been implemented would give the control board final say on collective bargaining agreements worth tens of millions of dollars. The MBTA's use of an archaic binding arbitration process currently leaves the final decision-making over labor disputes to a supposedly neutral, unelected individual. This is one of the many issues that Pioneer is focusing on as part of its new initiative, *PioneerLegal*.

*PioneerLegal* is the first enterprise of its kind in Massachusetts. It fights for changes to state and local statutes and policies in order to expand economic freedom and foster entrepreneurship by eliminating burdensome government mandates and challenging the status quo in policymaking.

Through *PioneerLegal*, the Institute will complement original public policy and legal research related to educational options, economic growth, and government

accountability with legal action. For the first time, the Institute will have the capacity to combine its highly respected policy reports and media presence with an active legal strategy to apply greater pressure for high-impact legal reform.

*PioneerLegal* will act as a vehicle to leverage longstanding relationships with pro-growth trade groups and like-minded attorneys across Massachusetts to drive changes in the practices that directly inhibit the liberties of Massachusetts residents. Moreover, we will strategically deploy staff and commit resources to pursue matters that have the potential to materially "change the debate" on state-level policy issues.

**To learn more, contact John Sivoella,  
Senior Legal Fellow at Pioneer Institute.**

**"Final and binding arbitration at the MBTA gives a single, unelected arbitrator massive power, and negates legislative intent, executive management authority and a meaningful role for the judiciary. After this winter's failures, we believe the legislature may have good reason to reassert its authority."**

– John Sivoella, *Boston Business Journal*

BOSTON  
BUSINESS JOURNAL



collective bargaining agreements, and bring much-needed transparency to the MBTA Retirement Fund. Pioneer’s research on its poor financial condition was validated last year by the whistleblower in the Bernie Madoff case. Another recommendation, that the state assume a portion of the T’s debt load associated with Big Dig mitigation projects, would enable the MBTA to redirect tens of millions of dollars for new cars, signals, switch heaters, and other maintenance and repair upgrades. Focusing on these priorities would help provide the commonwealth’s commuters with the reliable service they deserve.

## Engaging Citizens Through Open Government

A strong democracy depends on citizens’ ability to hold their public officials accountable for performance. In 2015, Pioneer’s Government Transparency team submitted public testimony and published over 50 blog posts and op-eds in support of greater openness in government. Pioneer continued its partnership with MuckRock, a public records submission service, on advocacy to reform open meeting and public records laws.

Massachusetts is among the weakest states in the nation when it comes to government transparency, but thanks to the work of a growing coalition of non-profit and media advocacy organizations, the tide is turning. This year, the Supervisor of Public Records began posting more public records information online, and the Massachusetts Governor voluntarily increased access to state agencies, lowering, standardizing,

## Transparency Toolkit

*Pioneer Institute is a leading voice for open and accountable government in Massachusetts. We believe that Massachusetts residents deserve to know how tax dollars are spent, and how key public policy decisions are made. We provide the tools citizens need in order to become more engaged.*



Find out how Massachusetts' state government is spending your tax dollars on [MassOpenBooks.org](http://MassOpenBooks.org).



Parents seeking better educational choices for their children, and teachers and administrators interested in comparing school and district performance, can visit [MassReportCards.com](http://MassReportCards.com).



Our [Munishare website](http://Munishare.com) empowers cities and towns to share information peer-to-peer, so they can borrow best practices from each other.



**OUR LATEST ADDITION**

[MassAnalysis.com](http://MassAnalysis.com) allows users to benchmark their city or town’s performance over multiple indicators, ranging from revenue and expenditure levels to employment and crime rates.

and waiving public records processing fees, and appointing a designated officer to track public records requests. But to truly serve the citizens of the Commonwealth, more reform is needed. In op-eds published in the *Boston Herald*, *The Patriot Ledger*, *The MetroWest Daily News* and other regional news outlets, Mary Connaughton and Pioneer Legal Senior Fellow John Sivoletta called for an end to legislative and executive exemptions from open meeting and public records laws.

A bill filed by Rep. Peter Kocot, pending in the state legislature, contains some substantive proposals long advanced by Pioneer. If enacted in its original form, the bill would impose penalties on agencies that fail to comply with requests (though it fails to address the slow timing of responses), reduce costs for requestors, allow for responses in digital format, and require agencies that wrongfully deny access to reimburse legal fees. In addition, all government agencies would have to designate a staff member to manage and respond to records requests. While the legislature may ultimately weaken the bill, Pioneer will keep a watchful eye on its progress to keep the public informed of its ultimate disposition.

In addition, State Senator Jamie Eldridge and State Treasurer Deborah Goldberg have publicly endorsed an idea long championed by Mary Connaughton and included in Pioneer's *Agenda for Leadership*, to establish a nonpartisan budget office for Massachusetts, independent of the governor and state legislature. As Connaughton told *The Boston Globe*, neutral information on the costs of proposed legislation "is sorely lacking."

**"The Reporters Committee for Freedom of the Press has ranked our state among the weakest in the nation for governmental transparency. A principal reason for the low ranking? Our Legislature has exempted itself from the commonwealth's open meeting and public records laws."**

– Mary Connaughton and John Sivoletta, in op-eds published in *The Patriot Ledger*, *The MetroWest Daily*, and *The Brockton Enterprise*

## Pioneer Institute's transparency internship program aims to cultivate future generations of policy makers intent on healthy, open government.

Under the stewardship of Mary Connaughton, the Institute mentors students to further develop their writing and analytical skills in preparation for successful careers in public policy and beyond. Pioneer's 2015 transparency interns published over 40 blog entries on topics ranging from the MBTA commuter rail and University of Massachusetts financing, to toll payer equity, K-12 school performance, and open records law.

Pioneer gratefully acknowledges the work of Northeastern University co-op students Scott Haller and Lauren Corvese, who have shown remarkable promise as Research Assistants focusing on transportation, healthcare, higher education, and other state budget issues.

**Do you know a college student or recent graduate who could benefit from our internship program? Contact us!**



# FIXING AMERICA'S TROUBLED CRIMINAL JUSTICE SYSTEM

Pioneer Institute's 24<sup>th</sup> annual Better Government Competition focused on innovative ways to address over-incarceration, recidivism, forensic-science errors and other problem areas in America's – and Massachusetts' – troubled criminal justice system.

Pioneer received over 150 entries from non-profits and community groups, law enforcement agencies, and policymakers across the U.S. The 2015 winning entry, submitted by Steve Good, Executive Director of Five Keys Charter School, is a proven corrections education model offering adult inmates vocational training and college dual-enrollment programs, to reverse the school-to-prison pipeline. The program illustrates the effectiveness of education as an alternative to mass incarceration, and as a means of improving economic mobility.

The runners-up and special recognition award recipients offer approaches that, if implemented, would reduce the costs of the criminal justice system and improve public safety. These include a high school curriculum developed for at-risk youth interested in a law enforcement career; an affordable housing program for the previously incarcerated; an information-sharing partnership between the New York District Attorney's Office and other law enforcement agencies; and a Pennsylvania Department of Corrections contract model that provides incentives

“Five Keys Charter School is able to design and structure its content to meet the unique needs and challenges of our inmate population, essentially turning a jail into a school campus that inspires inmates to become students and deputies to foster learning. Five Keys represents a change from dayrooms with TVs and checkers into classrooms.”

– Steve Good, Five Keys Charter School,  
2015 Better Government Competition Winner

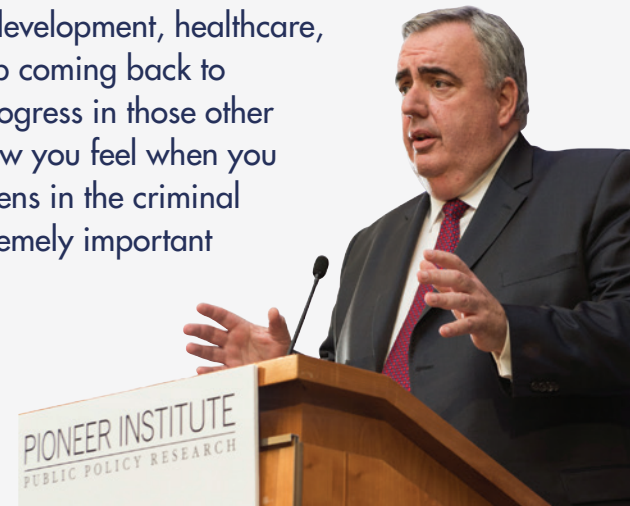




“When you have an organization that is looking at economic development, healthcare, and education like the Pioneer Institute, why is it that they keep coming back to criminal justice? I’ll tell you why. Without good safe streets, progress in those other areas can’t happen. It’s fundamental to where you live and how you feel when you get up in the morning, and when you go to work. What happens in the criminal justice system makes an enormous difference. And so, it’s extremely important that we foster good ideas.”

– Edward F. Davis, Keynote Speaker, Better Government Competition

2015 Better Government Competition Keynote Speaker Edward Davis, former Boston Police Commissioner, was also the winner of Pioneer’s 1995 Better Government Competition. He submitted a proposal, “Community Policing: Success in Lowell,” on behalf of the Lowell Police Department, where he spent over a decade as superintendent.



① Veronica Breer, Jane Akin and Caroline Murphy; ② James Cornell, Preston McSwain, Stephen Fantone, Ed Davis and Jim Stergios; ③ Governor Charlie Baker

to reduce recidivism. Additional proposals focus on re-entry housing, job-training, and a process for preventing crime lab errors.

The winning entries were selected by a judges’ panel of local leaders active in criminal justice issues, including Rev. Dr. Ray Hammond and Suffolk County District Attorney, Dan Conley. All finalists were honored at a June awards gala at the Seaport Hotel in Boston that was covered by *State House News Service*.

Massachusetts Governor Charles Baker provided welcome remarks at the awards gala, and Edward Davis, 35-year law enforcement veteran, delivered the keynote address. Davis was Boston’s police commissioner from 2006 to 2013 and earned national recognition for his leadership in the aftermath of the 2013 Boston Marathon bombings. During his tenure, Davis led successful efforts to reduce the City’s violent crime rates.

Pioneer publishes a compendium of winning entries that it distributes to policy makers and opinion leaders across the country. Ideas from the contest have saved taxpayers over \$700 million since 1991 and improved the quality of public services.

### STAY TUNED!

Our June 2016 Better Government Competition Awards Gala will recognize the country’s top proposals to improve care for those living with mental illness. Sponsorship opportunities are available.

**Please contact  
Kathryn McCarron,  
Chief Development  
Officer.**

# SOCIAL MOBILITY & A COMPETITIVE BUSINESS CLIMATE

Pioneer's economic opportunity agenda recognizes the crucial link between access to a job and the enjoyment of freedom and prosperity. The dignity of a steady income is what empowers individuals to lift themselves out of poverty, benefit society, and help fuel the economy. Massachusetts' public officials are moving in the right direction on proposals that encourage self-sufficiency, including welfare reform, tax incentives for low-wage earners, and more effective job training.

## Advancing Self-Sufficiency

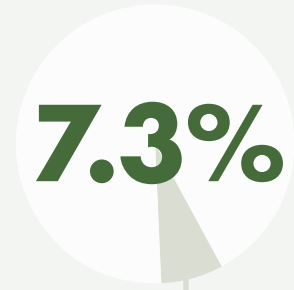
Researchers have long recognized that the unemployment rate doesn't tell the whole story about the health of the U.S. economy. A more accurate measure is the labor participation rate, or number of Americans in the labor force as a percentage of the civilian non-institutional population. An October 2015 Pioneer report showed that this rate hit a 38-year low, disproportionately impacting women and minorities.

Another positive development this year was passage of legislation doubling the earned income tax credit, which will **benefit 400,000 low-income workers**

One proven method of helping the unemployed ease into the mainstream economy is "workfare," a program that ties some entitlement benefits to employment. Transitional assistance programs were intended to provide temporary support and a path to independence. But a 2015 Pioneer study covered by *The Boston Globe* revealed that Massachusetts has the lowest workfare participation rate in the country, at only 7%. The workfare provision in the Bay State's successful 1995 welfare reform initiative helped reduce welfare rolls by more than half, but funds were diverted to other programs. Authors Greg Sullivan and Charles Chieppo called for a renewed focus among policymakers to revive the program, and State Senate President Stanley Rosenberg cited the report's findings in his announcement of a new initiative, WorkFirst, that includes workfare reform provisions.

Another positive development this year was passage of legislation doubling the earned income tax credit, which will benefit 400,000 low-income workers. Pioneer Research Director Greg Sullivan served on the bipartisan Tax Fairness Commission that first proposed an increase, designed as an incentive to remain in the workforce.

In the area of workforce development, Jim Stergios published a *Boston Globe* op-ed



“Only 7.3 percent of Massachusetts welfare recipients hold jobs or are in training to get one. That’s a lower percentage than anywhere else in the country, according to a new report by the Pioneer Institute.”

– Joan Vennoch, *The Boston Globe*



promoting an on-the-job training program for unemployment insurance beneficiaries. The proposal, which won the 2013 Better Government Competition award, has attracted the interest of the Massachusetts Executive Office of Housing and Economic Development.

## Unleashing Innovation

To ensure that everyone has the opportunity to work, Massachusetts needs a competitive economic climate that continues growing jobs. Pioneer’s research and proposals on regulation and tax incentives aim to level the playing field so that businesses can continue to expand and adapt to market forces with minimal government intrusion.

Entrepreneurship and innovation have been the backbone of Massachusetts’ economic success over the past few decades. Policymakers’ most important task is to remove legal and political barriers. This year, lawmakers considered legislation that would have imposed devastating regulations on ridesharing companies like Uber and Lyft. Pioneer published a brief opposing these measures, and calling on lawmakers to instead change existing taxi regulations to encourage cab companies to modernize and remain competitive. The report earned coverage on *WBZ*, *NECN’s “Broadside,”* and *BNN*.

Pioneer also updated its analysis of job growth in the life sciences industry in Massachusetts and other states, and concluded that the



 [Watch at youtube.com/watch?v=-cs9vbkDv5E](https://www.youtube.com/watch?v=-cs9vbkDv5E)

Bay State could benefit from adopting broad-based research tax incentives, like those in place in California, rather than singling out the life sciences. The report revealed that the Massachusetts Life Sciences Center has spent over half of its \$1 billion state appropriation to create just 5,000 positions, at an average cost of \$111,000 per job, far below the 250,000 that had been projected. The study urged policymakers to adopt a Super R & D Tax Credit, noting that Massachusetts was the only leading state for research and development to see overall spending fall between 2007 and 2011. Author Greg Sullivan successfully incorporated this recommendation into the final report of the Tax Fairness Commission.

**“Does it really make sense to spend a billion dollars targeting life sciences with incentives and ignoring a problem of the loss of research and development jobs statewide?”**

– Greg Sullivan, *WBUR*

## Investing in Infrastructure

One of the most often-cited obstacles to economic prosperity in the Commonwealth is traffic congestion. Bay State commuters, whether they travel by rail or road, deserve reliable service and a responsive government. A *CBS Boston* I-Team investigation featuring Mary Connaughton found that MassDOT completed only 67% of its road repair projects on time last year, compared to 90% in Maine and other states. As Connaughton noted in the story, “We should expect better performance here in Massachusetts.”

Instead of addressing statewide priorities, state leaders continue pushing for Boston-centered expansion projects with questionable economic benefit. Despite the MBTA’s \$9 billion debt and \$7.3 billion maintenance backlog, some are promoting a proposed North-South Rail Link, a tunnel connecting Boston’s North and South Stations, that could cost an estimated \$8 billion. Others are backing a South Coast Rail to New Bedford, which could total \$2.2 billion. Construction of an above-ground, 4.7-mile Green Line extension doubled in price from \$1.4 billion to \$3.1 billion, but transportation officials pledged to re-bid the project after Pioneer identified glaring problems with the procurement method. As Jim Stergios noted in a *Boston Globe* column, these costly expansion projects would crowd out critical infrastructure upgrades that directly affect local businesses in cities all across the state.

*The Boston Globe*

**“Last year it was a billion-dollar expansion of the Boston Convention and Exhibition Center, with an embedded \$110 million giveaway to a hotel developer. This year it was the recently abandoned Boston 2024 Olympic bid. Now we’re talking about digging a tunnel to connect North and South Stations. Boston has a megamalady, and it is a love affair with megaprojects.”** – Jim Stergios, *The Boston Globe*



# BUILDING A COMMUNITY AROUND IDEAS

Pioneer Institute hosts a full calendar of events each year, from exclusive galas at five-star hotels, to general-admission policy forums at the historic Omni Parker House to casual luncheons or cocktail receptions in Boston’s financial district.

Each spring, Pioneer brings together experts in medicine, business, and public policy for its annual healthcare program, the [Hewitt Healthcare Lecture](#), named in memory of former Pioneer chairman “Colby” Hewitt. Held at the Harvard Medical School, the event features provocative exchanges between nationally recognized experts in federal and state healthcare policy.

In June, Pioneer celebrates great ideas from all across the country on a wide variety of policy areas at its [Better Government Competition Awards Gala](#), a prestigious dinner and ceremony that attracts hundreds of leaders in the business, non-profit, government, and media communities.

The annual [Lovett C. Peters Lecture in Public Policy](#), named for Pioneer’s founder and long-time chairman, honors the work of visionary leaders whose revolutionary ideas are transforming society.

Pioneer sponsors more informal members-only events throughout the year, providing core supporters unparalleled access to public intellectuals, bestselling authors, and national political analysts in a relaxed setting, during breakfast, lunch, or early-evening cocktail receptions.

The Institute also holds lively and engaging education forums, free of charge and open to the public, featuring Pulitzer Prize-winning historians and influential education practitioners and policymakers.



① Grace Ann Foulkes, and Mark and Lynne Rickabaugh at the Lovett C. Peters Lecture; ② Rev. Jamison and Crystal Collier at the Better Government Competition; ③ Michael Horowitz, Bruce Johnstone and Kasey Kaufman at the Lovett C. Peters Lecture

# 2015 EVENTS



**2015 Hewitt Healthcare Lecture:  
"Under the Microscope:  
Advancing Healthcare Value  
Through Greater Transparency"**

April 22, 2015

Dr. Robert S. Kaplan, professor *emeritus*,  
Harvard Medical School

SIGNATURE EVENT

**"Exploring Medical  
Innovation"**

May 27, 2015

Dr. Thomas Stossel,  
Brigham & Women's Hospital

MEMBER LUNCHEON

**"Civil Rights:  
Charter Schools and  
Teacher Unions"**

February 26, 2015

Sephira Shuttlesworth,  
Director, Mid-Michigan  
Leadership Academy

Raymond Arsenault,  
University of South Florida  
professor, and author,  
*Freedom Riders: 1961 and  
the Struggle for Racial Justice*

Clayborne Carson,  
Stanford University professor,  
and Director of the Martin  
Luther King, Jr., Research  
and Education Institute

PUBLIC FORUM

**"Tear Down This Wall!": Teaching  
the Cold War in Schools**

March 26, 2015

Anne Applebaum, author, *Iron Curtain:  
The Crushing of Eastern Europe 1944-1956*  
and *Gulag: A History*

Edmund Morris, author,  
*Dutch: A Memoir of Ronald Reagan*

William Taubman, author,  
*Khrushchev: The Man and His Era*



PUBLIC FORUM



**"The War for Civilization:  
Teaching WWII in Schools"**  
(featured on C-SPAN)

May 4, 2015

David Kennedy, Stanford University professor,  
and author, *Freedom from Fear: The American  
People in Depression and War, 1929-1945*

Rick Atkinson, author, *The Liberation Trilogy*

Paul Reid, co-author with William Manchester,  
*The Last Lion: Winston Spencer Churchill:  
Defender of the Realm*

PUBLIC FORUM

**"The Erosion of  
Public Trust in  
Government:  
What It Means for  
the New Congress"**

January 13, 2015

Michael Barone,  
national political analyst

MEMBER BREAKFAST



**"The Forgotten Man:  
A New History of the  
Great Depression"**

March 9, 2015

Amity Schlaes,  
columnist and author

MEMBER LUNCHEON

**"Prospects for  
Change in  
Washington"**

April 29, 2015

William Kristol,  
national political  
commentator and  
founder, *The Weekly  
Standard*

MEMBER EVENT



**Better Government  
Competition Awards Gala**

June 24, 2015

Edward F. Davis,  
former Boston police commissioner

Charles D. Baker,  
Governor of Massachusetts

SIGNATURE EVENT

JAN

FEB

MAR

APR

MAY

JUN



“The great thing about Pioneer’s work is it’s not just pie-in-the-sky, but stuff you can actually do something with. And I can say this as Governor and as a former player in the Pioneer space, what an honor it is for me to stand here tonight to thank you for continuing to support this wonderful organization that over the course of many years has been able to provide guidance, advice, great people and a terrific sense of what’s possible to all of us here in the Commonwealth of Massachusetts.”

– Charles D. Baker, Governor of Massachusetts, at the 2015 Better Government Awards Gala

### “Know-Nothings’ Nativism, Catholic Education, and School Choice”

July 31, 2015

Nancy Lusignan Schultz, professor, Salem State University

Cara Candal, Senior Fellow, Pioneer Institute

Raymond Flynn, former Ambassador to the Vatican and former Mayor of Boston

Thomas Gosnell, President, American Federation of Teachers - Massachusetts

Kathleen Mears, Superintendent of Schools, Archdiocese of Boston



PUBLIC FORUM



### Book Launch: *Drilling through the Core*

(National Press Club, featured on C-SPAN Book TV)

September 28, 2015

Williamson Evers, Senior Fellow, Hoover Institution

James Milgram, professor *emeritus*, Stanford University

Sandra Stotsky, professor *emerita*, University of Arkansas

Peter W. Wood, president, National Association of Scholars

Ze’ev Wurman, Silicon Valley engineer

PUBLIC FORUM

### Lovett C. Peters Lecture in Public Policy

November 12, 2015

David Welch, Silicon Valley-based entrepreneur and Founder, Students Matter



SIGNATURE EVENT

JUL

AUG

SEP

OCT

NOV

DEC



# LITIGATING EDUCATION THE VERGARA CASE

Pioneer's 2015 Lovett C. Peters Lecture in Public Policy honored Dr. David F. Welch, a Silicon Valley-based entrepreneur whose passionate advocacy on behalf of California's K-12 students led to court action that could pave the way for major structural changes in the state's education system. Welch's organization, Students Matter, was the driving force behind the *Vergara v. California* decision, reaffirming the right of every student to learn from effective teachers.

In *Vergara*, the California Superior Court ruled that the state's K-12 teacher tenure, firing and layoff statutes violated the equal protection clause of the Constitution. Judge Rolf Treu concluded that evidence of the impact of ineffective instruction "shocks the conscience."

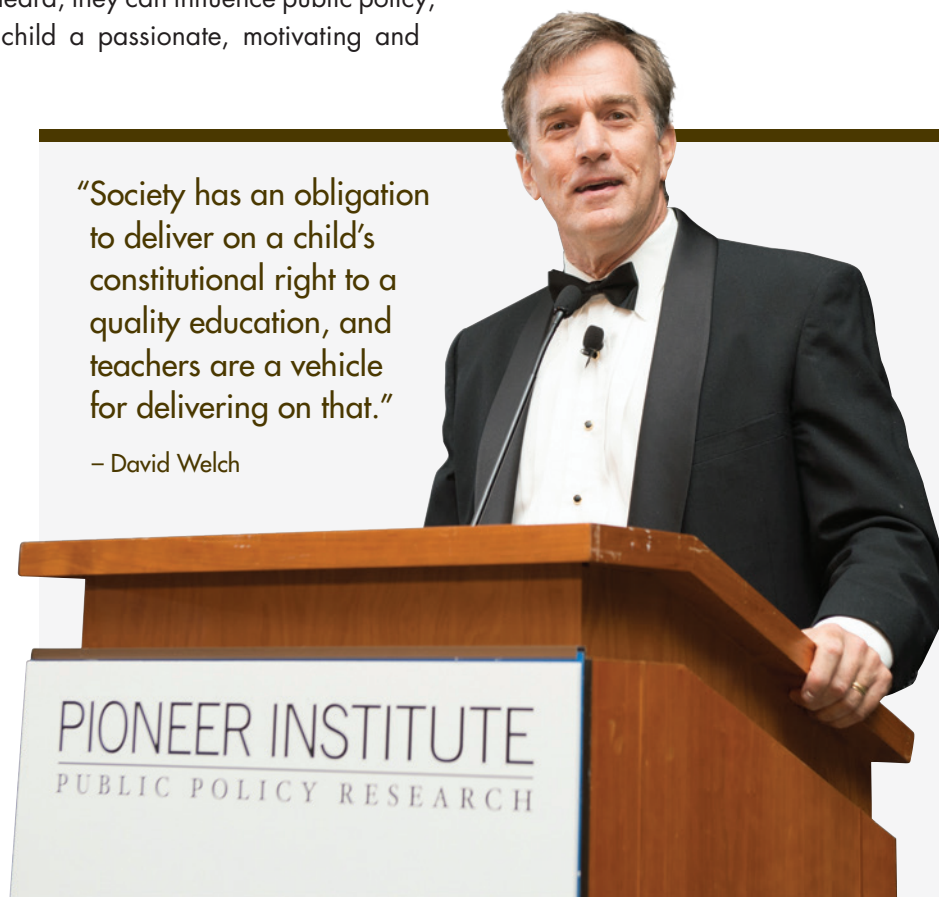
The *Vergara* decision could have repercussions nationwide. Related cases have already been brought, including one in Massachusetts, in which prominent Boston attorneys have filed suit on behalf of five Boston Public School students who were denied access to charter public schools because of the cap on expansion.

As Pioneer Chairman Stephen Fantone noted in his introduction, Dr. Welch is proving that "business leaders can advocate for children and parents whose concerns are not being heard; they can influence public policy; they can work to give every child a passionate, motivating and effective teacher, and give great teachers the respect and rewarding careers they deserve."

In 2001, Dr. Welch co-founded Infinera Corporation, an optical technology firm valued at \$3 billion. His contributions to the field of optical communications include more than 250 articles and over 100 patents in optical components and systems, and he has received numerous international awards. His passion for education reform stems from his

"Society has an obligation to deliver on a child's constitutional right to a quality education, and teachers are a vehicle for delivering on that."

– David Welch





## Shaping Future Generations

At the Peters Lecture, Pioneer Executive Director Jim Stergios engaged the audience in a moving tribute to one of the Institute’s most important staff members – Roger Perry, a World War II veteran, successful businessman, and tireless contributor to Pioneer’s development efforts.

### Roger Perry Internship Program

The Roger Perry Internship Program will support college-age students who want to enhance their educational experience with practical application in an energetic, creative public policy environment. Whether their interests focus on philanthropy, research or communications, we aim to cultivate the next generation of thinkers and doers.



**To make a contribution, contact Kathryn McCarron, Chief Development Officer.**



① Top Row - Amir Nashat, Jim Stergios, James Hollis, Faye Dangelo, Rev. Michael Dangelo; Bottom Row - David Welch, Ellen Clegg, Stephen Fantone, Elizabeth Fantone, Jim Peyser; ② Tara Pavia, Tony Roth, John Harrington; ③ Anthony Swensrud, Judy Mitchell, Jeffrey Swegler, Nancy Anthony; ④ Cathy Cantillon, Jane Akin, Steve Akin, Phil Cantillon

experience as a public high school student and being mentored by science teachers who nurtured his curiosity and problem-solving talent.

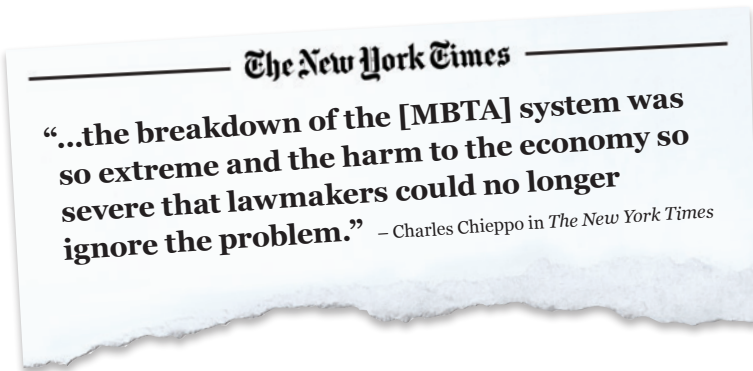
The annual Lovett C. Peters Lecture, named for Pioneer Institute’s founder and long-time chairman Lovett C. Peters, celebrates the work of visionary leaders whose ideas are transforming society. Past speakers include Sal Khan, Peter Diamandis, U.S. Senator Cory Booker, former U.S. Senator Bob Kerrey, Niall Ferguson, Eva Moskowitz, Deepak Srivastava, and many others.

# GROWING OUR AUDIENCE

We bring our message to the public by publishing and sharing academic-quality research with the widest possible audience through regular appearances on state and local news outlets. This year’s mentions come from newspapers, online journals, and radio and television stations across the country. With a growing media

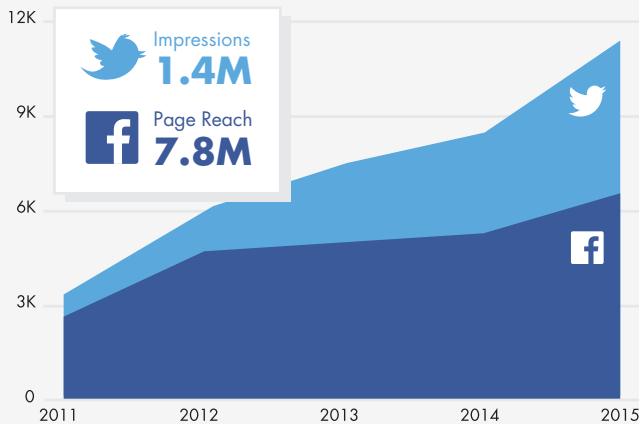
presence, we can continue to be a strong voice on behalf of social mobility, accountable and open government, high-quality education options, and affordable healthcare. In 2015, Jim Stergios became a columnist for *The Boston Globe* and continued his recurring appearances on *WBUR’s RadioBoston Week in Review* program. Pioneer placed over 130 op-eds this year. Its campaigns to reform the MBTA,

end Common Core, and lower healthcare costs earned over 500 mentions each, both locally and nationally.

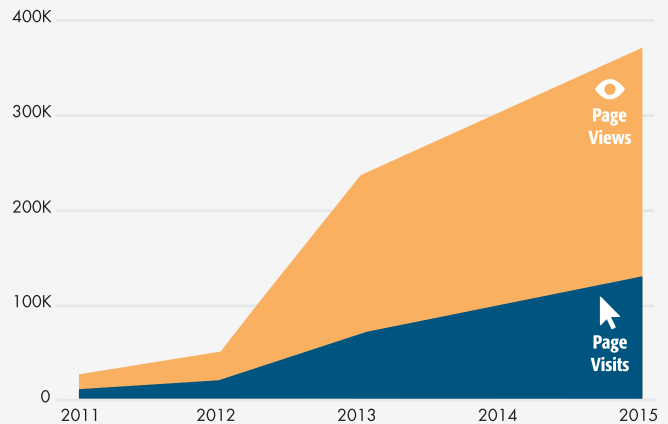


Pioneer’s op-eds and mentions were placed in outlets with a combined circulation of **1.02B**

## Social Media Reach



## Web Traffic





“Anyone who looks at the educational benefits of METCO cannot be a skeptic. Graduation rates for METCO students are 30% higher than in Boston, and college enrollment is 30% higher. Half are low-income, 75% are African-American and Hispanic, and one-quarter have special needs. By any measure, METCO is doing very well. The state should prioritize and expand this program.”

– Jim Stergios, *WGBH “Greater Boston”*

“Pioneer Institute has been using data-driven research and multimedia savvy to make its case that reform before revenue is needed at the T.”

– Joan Vennoch, *The Boston Globe*

“The national polling data reveals more bad news for the Common Core because 60 to 65 percent of America’s teachers are either ‘frustrated’ or ‘worried’ by it, only 20 percent of teachers are ‘enthusiastic’, and 44 percent of teachers now view Common Core ‘negatively.’”

– Jamie Gass, *Fox News*

“Doctors and hospitals and dentists are required to let you know how much a procedure costs. As are insurance companies. The problem is that it’s just not widely known and it’s not being complied with or implemented by the healthcare industry.”

– Barbara Anthony, *Fox 25*

“It’s astonishing because Massachusetts is a state that prides itself in good government and being the cradle of liberty. Yet, on government transparency, if we are not at rock bottom, we are very near the bottom.”

– Mary Connaughton,  
*The Boston Globe*

“Common Core is so big and sprawling a change that it’s often tough to see it whole. That problem has just been solved by *Drilling through the Core*, a book that’s bound to become the go to handbook of the Common Core’s opponents.”

– Stanley Kurtz, *National Review*

“In healthcare, the problem is we have a history of prices not being available. Providers don’t even know the prices of the items, consumers don’t know what they’re paying out-of-pocket until they get the bill. How can you allocate efficiently in a market like that?”

– Barbara Anthony, *The Washington Post*

“In 2013, former Massachusetts inspector general Gregory Sullivan conducted a study for the Pioneer Institute of the T’s in-house bus maintenance program, and found its costs per mile were the fourth highest of 379 U.S. bus-transit agencies.”

– David Scharfenberg, *The Boston Globe*





“Senior leadership at the Health Connector was often covering up and pressuring technical staff to approve shoddy work.”

– Josh Archambault, *NECN*

## Share Our Research


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 [twitter.com/PioneerBoston](https://twitter.com/PioneerBoston)

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## Get Involved

 [youtube.com/user/PioneerInstitute](https://youtube.com/user/PioneerInstitute)

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**Thank you!**  
 Pioneer wishes to recognize our longtime supporters, listed in **bold**, for their ongoing contributions of five consecutive years or more.

## In Memoriam

### R. Kingman “King” Webster

Pioneer celebrates the life and work of R. Kingman Webster. King was a well-known philanthropist, determined to make a difference. During his lifetime, King served on the Pioneer Institute Board of Directors, as President of the New England Feed and Grain Council, Chairman of the Board of the Lawrence Red Cross, President of the Lawrence YMCA, and many other esteemed positions.

Upon retirement, King and his wife Dee started the I Have a Dream Project, which promised 62 children from Lawrence a college education. In 2012 the couple led the effort to open the Community Day Charter Public School - R. Kingman Webster, a K1-4 public school located in Lawrence, MA. The school’s motto, “creating opportunities through education”—a credo King and Dee lived by. Few people can claim to have done more for the children of Lawrence than King. On behalf of the entire Pioneer community we extend our deepest condolences to Dee and the Webster family.



### John “Jack” Wrobel

Pioneer honors the life, service, and achievements of John Wrobel. A longtime donor and key advisor to the Better Government Competition, Jack was an active member of our community and a frequent attendee of the Institute’s Members events and educational forums.

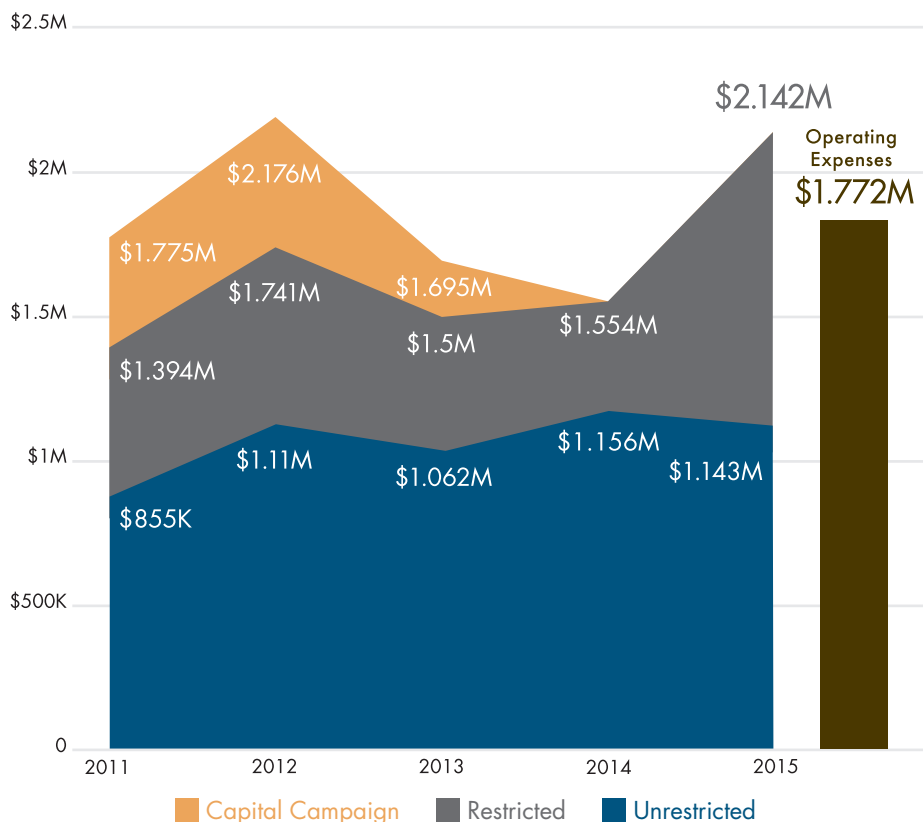
Jack was a retired Air Force Lieutenant Colonel who served for 21 years and later as vice president of program support at Shipley Associates. In the tradition of giving back to his community, Jack was an advisory council member for the Ford Hall Forum, a lector at St. Catherine’s Church, a former selectman in the town of Westford, a board member of the J.V. Fletcher Library, a supporter of Lowell’s United Teen Equality Center and a mentor to the Boy Scouts of America.

Jack’s sharp wit, infectious laughter and good will are sorely missed.



# FINANCIALS

## Revenue



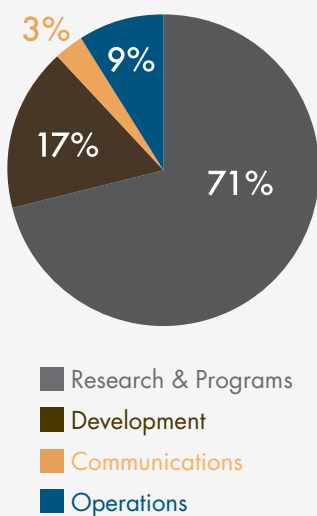
## Revenues & Expenses

Revenue	
Unrestricted Donations	\$1,106,678
In-Kind Donations	18,045
Restricted Donations	999,496
Other Revenue	18,461
<b>Total Revenue</b>	<b>2,142,680</b>
Expense	
Research & Programs	1,260,146
Communications	50,175
Development	308,149
Operating	153,624
<b>Operating Expenses</b>	<b>1,772,094</b>
Other Income	35,451
Other Expenses	50,002
<b>Increase in Net Assets</b>	<b>\$356,035</b>

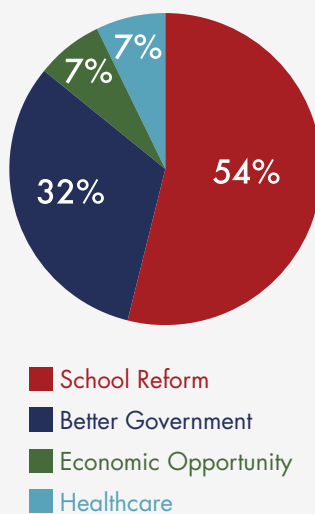
## Financial Position

Assets	
Cash	\$926,946
Contributions Receivable	47,450
Investments	1,118,081
Property & Equipment	956,997
Other Assets	20,475
<b>Total Assets</b>	<b>\$3,069,949</b>
Liabilities & Equity	
Accounts Payable & Other Accrued Expenses	\$67,867
<b>Total Liabilities</b>	<b>67,867</b>
Net Assets	
Unrestricted Funds	1,978,425
Temporarily Restricted Funds	779,924
Permanently Restricted Funds	243,733
<b>Total Net Assets</b>	<b>3,002,082</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$3,069,949</b>

### Expenses by Category



### Expenses by Research Area



See Audited Financial Statements Available at [PioneerInstitute.org](http://PioneerInstitute.org)

 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 the 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.

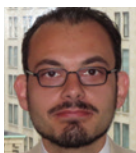


**Joshua Archambault** focuses on the implementation of healthcare reform in Massachusetts, and promotes patient empowerment and access to high-quality, affordable care. Previously, he was a Health Policy Fellow at the Heritage Foundation, Legislative Director in the State Senate, and Senior Legislative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



**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 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 holds a PhD in Political Science and Government and an MA Candidate in Statistics.

 Senior Fellows on Education



**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.




**Cara Stillings Candal** is an education researcher and writer. She is a 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.

 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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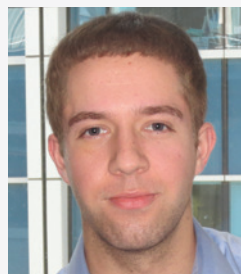


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In 2016, Pioneer will continue to focus on making sure that our public schools are second to none, that all parents have educational choices, that our transportation system works and transportation entrepreneurs can find new ways to serve riders, that business regulations are crafted in a way that promotes job creation, and that patients have access to care and to basic information about their care.

**That's the Massachusetts  
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