

The
DIGNITY
of **LIBERTY**



2016 Annual Report



PIONEER INSTITUTE
Public Policy Research

FORT INDEPENDENCE FLAG OF 1781

The Fort Independence Flag of 1781 is the oldest 13-stars-and-stripes American flag in the Massachusetts State House collection. The weatherworn flag was originally made for Jonathan Fowle of Boston, after Congress adopted the "stars and stripes" design for the national banner. He presented it to the officers of what is now known as Fort Independence, on Castle Island. The flag received a 13-gun salute from the first foreign war ship to visit the new United States after the war, in 1791.



Table ^{OF} Contents

Our Mission	4
Board & By the Numbers	5
Letter from the Director & Chairman	6
PioneerEducation	7
PioneerHealth	15
Hewitt Healthcare Lecture	19
PioneerPublic	20
Better Government Competition	26
PioneerOpportunity	28
Events	31
Lovett C. Peters Lecture	34
Media	36
Donors	38
Financials	43
Senior Fellows	44
Academic & Advisory Boards	45
Staff	46



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, economic opportunity and social mobility by publishing research and engaging the public through media campaigns, educational forums, and information sessions with influential thought leaders.



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



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



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



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.

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By The Numbers



36
PUBLICATIONS

Research Papers,
Policy Briefs, Testimony,
& Event Transcripts

2,326
MEDIA HITS



Articles, Interviews, & Editorials in
Newspapers, Trade Journals, TV & Radio
in Massachusetts & Across the Nation

53
EVENTS
Featuring
PIONEER

116 ATTENDEES
Average Per Pioneer Event



Figures reflect Pioneer's 2016 fiscal year: October 1, 2015 through September 30, 2016

THE *Dignity* OF *Liberty*

PIONEER'S TOP PRIORITY IS TO PROMOTE sound public policies that improve the lives of Massachusetts residents. At the writing of this letter, with our country's inflamed political rhetoric evoking tumultuous times, it is important to recall core principles and the Institute's indispensable role in ameliorating the quality of public discourse.

“LIBERTY BESTOWS DIGNITY.”

That is why we chose the Fort Independence Flag of 1781, a symbol of our newly-won liberty, to grace the cover of the 2016 Pioneer Institute *Annual Report*. Danvers Militia Captain Levi Preston, who was present in 1775 for that momentous “shot heard round the world,” once noted that his fight against the “Redcoats” was about more than wealth and taxes. It was about “govern[ing] ourselves” — in other words, the *dignity* of our citizens.

Liberty bestows dignity. Liberty requires reason and trust. When wed with the ingenuity of a people, liberty is capable of once unimaginable achievements.

Massachusetts knows something about liberty. Ordered liberty has so often made the Commonwealth home to the next “great thing,” from our earliest successes in trade and manufacturing to finance, computers, biotech, and a host of other industries and innovations. The liberty to improve one's station in life through good judgment and enterprise is crucial to our state's well-being.

Liberty and the success of Massachusetts' 21st century economy are stymied by a government that operates as if we were still in 1950. Liberty is imperiled when the healthcare marketplace is riddled with opaque rules and

barriers, when health programs consume 60 percent of the state budget, when our transit and transportation systems slow and disrupt our lives, and when Massachusetts bears the dubious distinction of being one of the most indebted states in the nation.

More than six decades after *Brown v. Board of Education*, the dignity of liberty is unattainable when substandard district schools sentence students to a lifetime of poverty. The charter school ballot initiative may be behind us, but not the urgency needed to promote high-quality district, charter, vocational-technical, inter-district, and even private and parochial school choices.

Educating children in self-government and citizenship has always been the most effective antidote to poisonous public discourse and narrow partisanship. State-based think tanks like Pioneer play a critical role in restoring the rationality and trust needed to make progress on the key public policy challenges we face.

“LIBERTY REQUIRES REASON & TRUST.”

Few organizations can boast the same dollar-for-dollar impact as Pioneer in the issue areas critical to expanding prosperity and liberty. We will continue to invest deeply to reach tens of thousands more people each year, with the goal of promoting empirical thinking and respectful public debate.

We will never shrink from clearly stating facts, while remaining clear-eyed in our purpose: the betterment of our state, country, and our fellow citizens. We stand squarely for the dignity of liberty. We thank you for standing with us.



JIM STERGIOS
Executive Director



STEPHEN D. FANTONE
Chairman



REINVIGORATING CLASSROOM LEARNING

School Choice & Academic Excellence

SINCE ITS FOUNDING, PIONEER INSTITUTE has recognized that educational opportunity is at the core of upward mobility. For millions of schoolchildren across the country and tens of thousands here in the Commonwealth, zip code still determines a child's ability to attend a high-quality school and pursue the American dream. That's why Pioneer promotes a range of school choice options, rigorous academic content in classrooms, and district accountability for student performance.

The results of Pioneer's relentless research and media advocacy are impressive. Through work in 33 states, Pioneer has been able to roll back full implementation of the mediocre Common Core national education standards and tests, to ensure local — not federal — control over children's academic destiny.

In the Commonwealth, a victory was won for the thousands of waitlisted students hoping to pursue a career in the trades, when the Legislature passed \$45 million over a three-year period to support and expand vocational-technical schools across the state. In 2016, the Institute's education initiatives earned over 500 local and national press mentions, including several editorial endorsements. In the year ahead, Pioneer will elevate its profile nationally, with continued advancement of strong academic standards, a new book sharing lessons from Massachusetts' successful charter public school movement, and a documentary film dramatizing how barriers to school choice are hurting families across the country.

EXPANDING SCHOOL OPTIONS THAT ARE WORKING FOR MASSACHUSETTS

Over 30,000 Massachusetts children are on waitlists hoping to attend charter public schools. State-imposed enrollment caps currently prevent more students from

being able to access charter seats in Boston, Springfield, and other urban centers, leaving families with no alternative but failing district schools.

Powerful teachers unions spent over \$20 million in 2015–16 opposing charter public schools, preventing legislative debate on the issue, and defeating a referendum to allow 12 new or expanded charters per year. Though Pioneer's preferred approach was not the ballot route, the Institute took advantage of the increased exposure to promote these schools and their success in closing achievement gaps among poor and minority students. Pioneer hosted public forums featuring Civil Rights activist Cheryl Brown Henderson, daughter of the lead plaintiff in the landmark Supreme Court case, *Brown v. Board of Education*; Dr. Sephira Shuttlesworth, regional support director for SABIS® Educational Systems and widow of the Birmingham, Alabama, Civil Rights leader, the Reverend Fred Shuttlesworth; education reformer Deborah McGriff; and lively panels with education policy experts, school leaders, and teachers, moderated by *WCVB*'s Janet Wu and former *Boston Globe* columnist Joanna Weiss. Following the events, Pioneer enlisted Henderson and Shuttlesworth in pro-charter advocacy efforts, with appearances in web videos that garnered nearly 500,000 views in Massachusetts, and op-eds placed in national and local publications.

“SINCE 1993, BILLIONS OF DOLLARS IN ADDITIONAL STATE AID HAVE BEEN INVESTED IN URBAN DISTRICTS, MAKING THEM TODAY AMONG THE NATION'S BEST-FUNDED PUBLIC SCHOOLS. YET THE IMPACT OF THAT INVESTMENT HAS BEEN AT BEST MODEST IMPROVEMENT FOR STUDENTS. MEANWHILE, CHARTERS HAVE PROVEN TO BE HIGHLY EFFECTIVE OPTIONS FOR PARENTS.”

JIM STERGIOS,
CommonWealth magazine

2016 IMPACT

With your financial support, Pioneer promoted rigorous academic standards & a portfolio of school choice options

Our Successes Include:

- Because of Pioneer's extensive research on the issue, state leaders rejected participation in the inferior, Common Core—aligned testing consortium in favor of an improved version of the Massachusetts Comprehensive Assessment System (MCAS). The decision prompted national coverage of Pioneer's analysis in *The New York Times*, *PBS Newshour*, *NPR*, and other outlets.
- Pioneer continued to lead the national debate on Common Core with the release of *Drilling through the Core: Why Common Core is Bad for American Education*, a one-volume compilation of the Institute's comprehensive research on the initiative's exorbitant costs, dubious legality, and poor quality. To date, the book has sold over 1,000 copies across the country.
- A key Pioneer report on the efficacy of vocational-technical education in Massachusetts led to a multi-million dollar investment in the program for the first time in 35 years.
- Pioneer has continued to advocate for greater school choice; specifically, raising the cap on charter public schools. The Institute's marketing campaign focused on educating the public on the concept of charter schools, counteracting misinformation distributed by charter opponents, highlighting successes, and scrutinizing district school failures.

In a dozen in-depth reports accompanied by videos filmed on-site at charters serving high-needs students all across the state, Pioneer presented some of these schools' most distinctive features: longer school days; flexible hiring; use of data to inform instructional techniques to meet individual student needs; small group and one-on-one tutoring; curricular innovations; relentless communication with parents; intensive remediation; and strategies to instill character education. The Institute also deployed aggressive digital and traditional marketing strategies designed to educate targeted demographics on the concept and achievements of charter public schools; counteract charter opponents' misinformation related to funding, attrition, and support for special needs students; and publicize the chronic under-performance of district schools.

“THERE'S A DIRECT CORRELATION BETWEEN *Brown v. Board* AND CHARTER SCHOOLS. WE REALLY DO KNOW HOW TO EDUCATE CHILDREN — IT IS NOT ROCKET SCIENCE. BUT THE ONE THING IT REQUIRES THE MOST IS SOMETHING OUR NATION HAS YET TO MAKE HAPPEN AND THAT IS POLITICAL WILL. AND A RECOGNITION THAT THIS IS A COLLECTIVE ACTION — THAT IF WE HAVE CHILDREN WHO ARE FAILING, WHO ARE NOT ACHIEVING, WHO ARE NOT SUCCESSFUL, WE ALL PAY THE PRICE FOR THAT. IT IS NOT US AND THEM; IT IS ONLY US.”



CHERYL BROWN HENDERSON, daughter of Rev. Oliver L. Brown, lead plaintiff, *Brown v. Board of Education*, Keynote at a September 2016 Pioneer forum, “Equal Access to Excellence: Charter & District School Reform”

Through this intensive campaign, Pioneer aimed to improve public awareness and build positive sentiment about the mission of charter schools, encourage interest among prospective applicants, and replicate high-performing charters' strategies at all public and private schools throughout Massachusetts. In the aftermath of the election, Bay State charters have seen a record increase in the number of applicants for the 2017-18 school year; in Boston, the number has more than doubled since the previous year.

In addition to charter schools, another proven program that is helping minority schoolchildren succeed is the Metropolitan Council for Educational Opportunity (METCO). Through METCO, over 3,300 largely African-American and Latino children living in Boston and Springfield attend schools in higher performing

Charter Schools Are Working For Massachusetts

OUR 2016 CAMPAIGN TO PUBLICIZE CHARTER PUBLIC SCHOOLS' SUCCESS USED DIGITAL CHANNELS and traditional media to reach targeted populations of prospective families and concerned citizens in urban and suburban locations across the Bay State.

Our strategy resulted in...

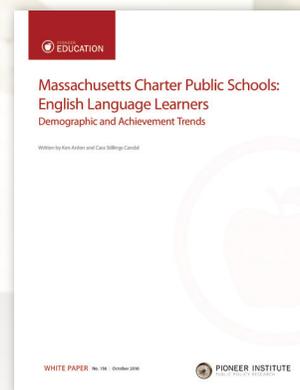
471K

Video Views
Facebook
& YouTube



3K
Report
Downloads

Focusing on charter school best practices, demographics, student achievement, and funding



3.6M Digital Ad Impressions
Google, Facebook, Twitter

Charter Schools are Working for Massachusetts.

LEARN MORE



134 Op-Eds & Press Mentions

The Boston Globe, Boston Herald, Wall Street Journal, regional newspapers, NECN, WBUR, EducationNext, WGBH, Commonwealth magazine, Real Clear Education, WRKO, WBZ, The 74 Million

“THE BOTTOM LINE IS THAT YOU CAN REFORM CONVENTIONAL SCHOOL DISTRICTS WHILE ALSO MAKING SURE THAT POOR AND MINORITY KIDS HAVE CHOICES SO THAT THEY’RE ABLE TO SUCCEED IN LIFE.”

PIONEER’S JAMIE GASS
DEBATED GLENN KOOCHER,
Massachusetts Association of School Committees, on “Bay State Forum”



Cara Stillings Candal

COMING THIS FALL: Pioneer Institute is releasing a new book, authored by Senior Fellow Cara Stillings Candal, chronicling the origins and growth of the extraordinary charter public school movement in Massachusetts, with case studies and key recommendations for other states. The Institute will hold a book launch event in our nation’s capital and embark on a speaking tour across the U.S. Help us spread the word about the Bay State’s charter success story and continue promoting high-quality educational opportunities that transform lives — please make a gift today.

Please make a gift today: PIONEERINSTITUTE.ORG/DONATIONS/

surrounding districts. Compared to peers in their home districts, METCO students have higher graduation rates; 90 percent pursue post-secondary education. Sadly, funding declined by 18 percent between 2007 and 2014 and the program can only accommodate up to 400 new students each year, leaving families on a five-year waiting list. At Pioneer’s urging, through outreach, op-eds, and media appearances touting METCO’s benefits and demand, state policymakers have facilitated governance changes and signaled a willingness to reform and enhance funding for the program, now in its 50th year.

PREPARING STUDENTS FOR BOTH COLLEGE & CAREER SUCCESS

Vocational-technical schools across Massachusetts enroll 17 percent of high school students, and have delivered remarkable results. MCAS performance at these

schools has improved by 40 percent over the last decade. Regional vocational-technical schools enroll a much higher percentage of special education students than traditional districts, while posting higher special education graduation rates and lower dropout rates. Parents have responded — these

schools have seen increased demand, with over 3,000 students on statewide waitlists, including many in Gateway Cities. Unfortunately, one-third of Bay State cities and towns do not belong to a vocational-technical district; in 52 communities, families have no access to these schools.

“AS MASSACHUSETTS POLICYMAKERS PONDER WAYS TO EXPAND THE COMMONWEALTH’S PUBLIC EDUCATION SUCCESS, PROVIDING MORE STUDENTS WITH ACCESS TO VOCATIONAL-TECHNICAL EDUCATION SHOULD BE NEAR THE TOP OF THE LIST.”

TOM BIRMINGHAM,
Worcester Telegram & Gazette

A Pioneer report estimated that it would cost less than 0.5 percent of the state education budget to provide 5,000 more voc-tech placements in the Commonwealth. Pioneer research has shown that vocational-technical school graduates are often more team-oriented, disciplined, and job-ready than general education or college preparatory graduates. To build support for expansion, Pioneer held a public forum, co-sponsored by the Massachusetts Association of Vocational Administrators and other organizations, called “Pathways to Equal Opportunity: Vocational-Technical Education and the Liberal Arts”; released a report, *Expanding Access to Vocational-Technical Education in Massachusetts*; and shared the report’s findings in a *Boston Business Journal* op-ed urging more action. In the months following, the Baker administration worked with the state legislature to commit \$45 million over a three-year period to support career vocational-technical education, for equipment, expansion, STEM programs, and to strengthen relationships between vocational schools and employers.

ENDING FEDERAL CONTROL OVER K–12 STANDARDS, TESTS, AND CURRICULA

Pioneer continued to lead the national debate over education standards with the publication of the widely distributed and well-received book, *Drilling through the Core: Why Common Core is Bad for American Education*, scrutinizing the quality, legality, and cost of the controversial standards. The book received positive coverage in *National Review*, *The Washington Post*, *C-SPAN Book TV*, *NBC-San Diego*, “The Ingraham Angle,” *Voice of America*, and talk radio stations across the U.S.

Thanks in large part to Pioneer’s multi-year research and advocacy campaign raising awareness about the poor academic quality of the standards and concerns about federal control over K–12 education, Common

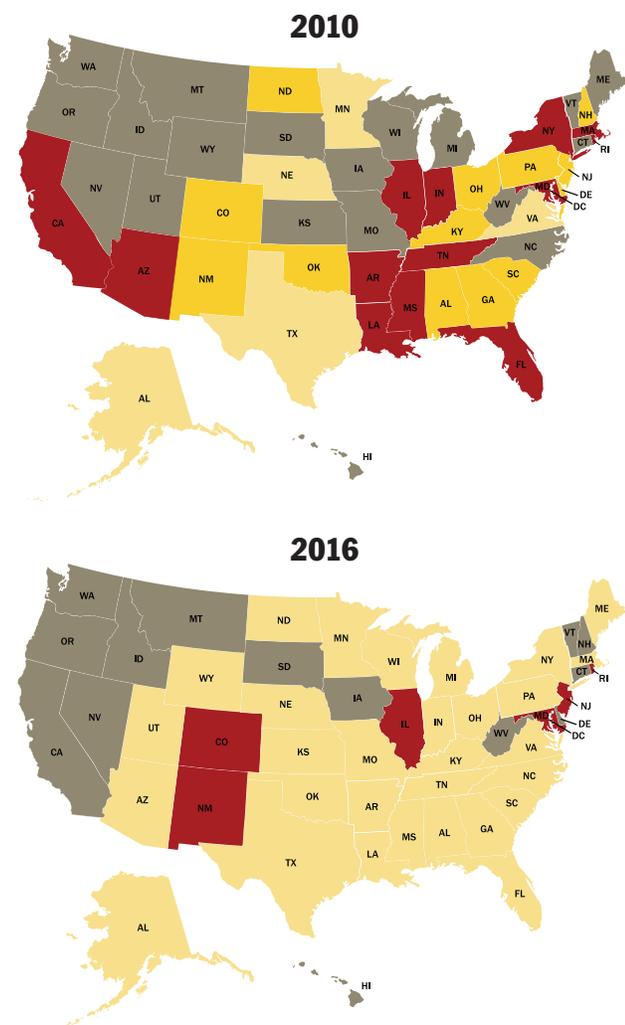
IN EDITORIAL BOARD MEETINGS across Massachusetts, Tom Birmingham, Pioneer’s Distinguished Senior Fellow in Education, and Jamie Gass, Director of the Center for School Reform, raised important questions about the wisdom and fairness of tying Massachusetts to the Common Core-aligned testing consortium, PARCC.



Fitchburg Sentinel & Enterprise editorial board meeting

“IF WE ADOPT PARCC, WE WOULD CEASE TO BE MASTERS OF OUR OWN DESTINY AND PUT OURSELVES INTO THE MIX WITH NINE OR TEN OTHER STATES AND THE DISTRICT OF COLUMBIA, WHERE THERE WOULD BE TREMENDOUS PRESSURE TO LOWER OUR HIGH STANDARDS — IT WOULD BE A BIG STEP BACKWARDS FOR MASSACHUSETTS.”

PARCC'S DECLINING MEMBERSHIP



- SBAC
- PARCC
- Both
- State-Designed Assessment

Note: Iowa is a member of SBAC but is still weighing whether to implement the test. Four other states have remained in that consortium but will not use its assessment.

SOURCE: Data collected by authors from state education agency websites, the U.S. Department of Education's Race to the Top Assessment Program Applications for New Grants, 2010, and media coverage, including *Education Week*, "The National K-12 Testing Landscape," 2015

Core's implementation has ground to a halt all across the country. Thirty-eight states have severed ties with the testing consortia aligned with Common Core; twenty states (including Massachusetts, Mississippi, and Louisiana) have withdrawn from PARCC, reducing its membership by two thirds, to just five states and the District of Columbia. The other Common Core-aligned testing group, Smarter Balanced (SBAC), has also seen its membership reduced by half, and now barely meets the threshold for federal funding.

During the Massachusetts education board's de-

liberations over whether to transition from MCAS to PARCC, Pioneer published analyses showing that abandoning MCAS would translate to a six-month decline in performance expectations for grade 4 math and reading, and grade 8 math. Revising and updating MCAS, instead, would increase the rigor of assessments and reduce costs.



“BETWEEN 2011 AND 2013, AS MASSACHUSETTS HAS IMPLEMENTED COMMON CORE, WE’VE EXPERIENCED A FIVE-POINT DROP IN OUR 4TH GRADE READING SCORES ON NAEP, THE LARGEST DECLINE IN THE COUNTRY. WE’RE STILL NUMBER ONE IN ALL GRADES AND SUBJECTS TESTED, BUT OUR 4TH GRADERS HAVE LOST A DECADE OF ACHIEVEMENT UNDER COMMON CORE. FOURTH GRADE READING IS THE STRONGEST PREDICTOR OF FUTURE ACADEMIC ACHIEVEMENT.”

JAMIE GASS, TOM BIRMINGHAM, & LUDLOW SUPERINTENDENT OF SCHOOLS TODD GAZDA
WGBY's (Western Massachusetts' PBS affiliate)
“Connecting Point”

Pioneer publicized these findings broadly. *The Boston Globe* published multiple columns by Pioneer executive director Jim Stergios, and the Institute's analysis was mentioned on *PBS Newshour*, *NPR*, *WBUR*, and *NECN*; and in *Politico*, the *Associated Press*, *CommonWealth* magazine, *Salem News*, *Brockton Enterprise*, *The Gloucester Times*, and *The MetroWest Daily News*. Pioneer also secured editorial support from the *Boston Herald*, *The Patriot Ledger*, and *The Lowell Sun*.

In November, the Baker administration surprised the education policy community by announcing plans to pursue a state-based, hybrid assessment instead of adopting PARCC. As policymakers proceed with implementation, Pioneer will continue to monitor revisions. Pioneer shared with state education leaders a pair of devastating critiques of Massachusetts' so-called Next Generation Science Standards, adopted by the state education board; the reports, authored by distinguished national experts in life sciences, found that the standards marginalize important topics related to genetics and cell biology that were included in the earlier version.

RESTORING U.S. HISTORY INSTRUCTION IN K-12 EDUCATION

For nearly a decade, Pioneer has been working to support the full preservation of the Bay State’s nationally recognized current K–12 U.S. history standards and passage of the U.S. history MCAS test as a high school graduation requirement for public school students. Working with a broad coalition of social studies teachers, state and national history museums, and other education-related non-profits, Pioneer has hosted forums with Pulitzer Prize-winning historians, and published numerous op-eds covering milestones in America’s past to underscore the importance of U.S. history and civics instruction. A January forum on U.S. economic history featured Vanderbilt biographer and two-time Pulitzer Prize-winning author T.J. Stiles, and an April event on teaching the Jacksonian era held in conjunction with the Northeast Regional Conference on the Social Stud-

ies was headlined by Pulitzer Prize-winning historian Daniel Walker Howe and two-time Pulitzer Prize winner Alan Taylor, who specializes in American slavery and Jacksonian democracy.

In 2016, Pioneer’s Jamie Gass and Tom Birmingham secured editorial support for a renewed commitment to U.S. history instruction from regional newspapers across the Commonwealth, including *The Berkshire Eagle*, *Cape Cod Times*, *The Lowell Sun*, *New Bedford Standard Times*, *Fitchburg Sentinel & Enterprise*, and *The Springfield Republican*. In addition, Birmingham co-authored op-eds calling for more civics education with former Massachusetts Governor Michael Dukakis in *The Boston Globe* and regional outlets; they also made a joint appearance on *WBZ’s “Nightside with Dan Rea.”*

A Pioneer report, *Advanced Civics for U.S. History Teachers*, raised concerns about mounting evidence of Americans’ alarming lack of civics and history literacy.

OUR COMMITMENT TO U.S. HISTORY INSTRUCTION

The Frederick Douglass Prize

Pioneer Institute congratulates the winners of the Institute’s third annual Frederick Douglass U.S. History Essay Contest for Massachusetts high school students. The program encouraged students to select from dozens of Massachusetts entrepreneurs and inventions and submit an essay that explained the topic’s historical impact and significance. Prize winners, pictured here, were presented with awards at a Pioneer history forum, “The Age of Jacksonian Democracy: Teaching Antebellum America in Schools,” held in April at the 46th Northeast Regional Conference on the Social Studies in Sturbridge, Massachusetts.

Public Forums

Our public forums in U.S. History have explored the most significant periods in the American narrative, from the Founding era and slavery, through the Civil Rights movement. Featured speakers have included Pulitzer Prize-winning historians and best-selling authors such as Daniel Walker Howe, Clayborne Carson, Anne Applebaum, David Kennedy, and many practitioners in the fields of education and public policy. Some events in this series have been broadcast on C-SPAN.



Hopkinton High AP U.S. History teacher Steven Spiegel with top prize winner Avery Sherffius



Sigbha Javaid of the University Park Campus School in Worcester, pictured with her parents



Ryan Hutchins from Bishop Feehan High School in Attleboro, pictured with his father

To learn more, visit: PIONEERINSTITUTE.ORG/US-HISTORY-INSTRUCTION/

Be part of an exciting, feature-length documentary...



FAMILIES ACROSS THE COUNTRY ARE SEEKING THE BEST EDUCATIONAL OPTIONS FOR THEIR CHILDREN. Our new film traces the ordeals of very different families who share the same struggle to send their children to schools that offer instruction rooted in religious faith, academic rigor, and a culture of respect. These families come from diverse backgrounds — including a Baptist single mom and her two teenage daughters from Stockbridge, Georgia, who are plaintiffs in a lawsuit against the state’s Know-Nothing legal barriers; and a missionary couple struggling financially to enroll their three young daughters in a Christian school in Midland, Michigan. These states have some of the most restrictive legal and constitutional barriers to tax credit scholarships, vouchers, and other mechanisms that would make it possible for low- and middle-income families to afford parochial school tuition. Their moving stories will endear them to audiences from every faith background - and mobilize sympathizers and activists to challenge the special interests that are protecting the *status quo*, perpetuating the shameful legacy of anti-Catholic bigotry, and blocking greater parental choice.

Support this groundbreaking film project today so that we can ensure that these stories touch the hearts of millions of families all across America, and inspire them to take action to end this injustice in their communities and states!

Visit: PIONEERINSTITUTE.ORG/DONATIONS

“STUDENTS WHO ATTEND CATHOLIC SCHOOLS — MANY OF WHOM ARE NOT CATHOLIC — GET A GOOD, SOLID EDUCATION; THEY LEARN DISCIPLINE AND VALUES, AND THEIR TEST SCORES ARE BETTER THAN THEIR DISTRICT PEERS’. BUT MANY POOR CHILDREN ARE DENIED THIS OPPORTUNITY AND A CHANCE AT A BETTER LIFE BECAUSE THEIR PARENTS CAN’T AFFORD TUITION. THE BIGOTED KNOW-NOTHING LAWS SHOULD HAVE BEEN REPEALED A LONG TIME AGO.”

AMBASSADOR RAYMOND FLYNN,
on *NECN’s “The Take with
Sue O’Connell”*

The leader of this movement, Governor Henry Gardner, was a member of the nativist “Know-Nothing” party. His portrait hangs next to the main entrance of the Massachusetts House of Representatives. Pioneer made headlines in 2016 with its campaign urging state leaders to relocate Gardner’s portrait from its position of prominence, where it serves as a symbol of anti-Catholic bigotry. Pioneer’s Jamie Gass authored op-eds calling for moving the portrait and repealing the amendment that Gardner championed, that appeared in *The Taunton Daily Gazette*, *The Lowell Sun*, *Fall River Herald News*, *The MetroWest Daily News*, *The Providence Journal*, and *The Springfield Republican*.

The Institute garnered additional media attention when it made this issue the focus of its Friedman Legacy Day event, held in front of the Grand Staircase of the Massachusetts State House. The forum featured Raymond Flynn, former Mayor of Boston and Ambassador to the Vatican; Gerard Robinson, resident fellow at the American Enterprise Institute, former commissioner of education in Florida, and former Virginia secretary of education; policy analyst and former New Hampshire State Representative Jason Bedrick; and Grace Cotter Regan, Head of St. Mary’s High School in Lynn. Pioneer’s Jim Stergios delivered introductory remarks at the event; in addition, he submitted an open letter to the Governor and other state leaders, and authored a *Boston Globe* op-ed calling for the repeal of the Know-Nothing amendments. Ambassador Flynn was interviewed on *NECN*, and the event received coverage in the *State House News Service*, *The Boston Globe*, and *Breitbart News*.



PIONEER
Health

REVIVING THE HEALTHCARE MARKETPLACE

Consumer Engagement, Competition, & Innovation

PIONEER'S HEALTHCARE POLICY agenda aims to expand access to healthcare price information so patients can make wise purchasing decisions, streamline regulations that act as barriers to market competition, and foster more innovation in the delivery of medical services. It also seeks more creative solutions to society's most challenging public health issues, mental illness and opioid addiction.

EMPOWERING PATIENTS TO BECOME HEALTHCARE SHOPPERS

American households are spending a growing share of their income on medical expenses, and a rising number are being shifted onto high-deductible health insurance plans. A Pioneer report, *What Will U.S. Households Pay for Health Care in the Future?* projected that healthcare costs for a family of average income could increase by over 50 percent by 2025, consuming 20 to 27 percent of household earnings.

Now more than ever, it is essential for patients to proactively shop for the highest-quality, lowest-cost healthcare available. Prices for the same procedures, services, and medications can vary significantly based on geographic location and other factors, putting a heavy information-gathering burden on consumers. Despite having one of the most robust healthcare transparency laws in the country, Massachusetts residents still struggle to obtain basic price information for their treatments.

PioneerHealth's recent research and programs have sought to address this issue through a public awareness campaign to empower consumers to make informed choices about their medical treatment, and to urge the healthcare provider community to adopt a culture of consumer-friendly price transparency.

As the Massachusetts Senate was on the brink of passing legislation that would have imposed price con-

trols on the development of new medicines, Pioneer released *Are Drug Prices Driving Healthcare Cost Growth?*, a report exploring the basis for high costs and warning of the potential threat excessive regulation posed to innovation. The report was featured in *The Boston Globe*, *MarketWatch*, and *State House News Service*. Pioneer submitted legislative testimony drawing on the study's findings, and the proposed bill was amended to eliminate the price cap.



“AS A COUNTRY, WE ARE REALLY LAGGING BEHIND IN TERMS OF HEALTHCARE PRICE TRANSPARENCY FOR CONSUMERS. IT IS A VERY DAUNTING TASK FOR THE AVERAGE CONSUMER TO FIND OUT THE PRICE OF A PROCEDURE BEFORE OBTAINING THAT PROCEDURE. WE REALLY HAVE A LONG WAY TO GO TO GIVE CONSUMERS THE TOOLS THAT THEY NEED IN ORDER TO SPEND THEIR HEALTHCARE DOLLARS WISELY.”

BARBARA ANTHONY

Pioneer Institute Senior Fellow in Healthcare, discussing a Pioneer report on wide price variation for the same procedure in six states, featured on the nationally syndicated investigative news program, “Full Measure.”

“No community needs convenient care clinics more than Boston. A recent survey of 15 metropolitan markets found that Boston patients experience the longest average wait to get a doctor’s appointment — 45.4 days. It took city residents an average of 66 days just to get an appointment with a family physician. Is it any wonder that they turn to emergency rooms for treatment?”

Jim Stergios

The Boston Globe

Pioneer Senior Fellows Barbara Anthony and Josh Archambault launched a new Healthcare Price Transparency Working Group, a partnership with over a dozen leaders from healthcare provider organizations, insurer associations, businesses, and industry and consumer advocates, to explore opportunities to expand patients’ access to important information about their medical procedures, including cost and quality; engage them in decision making; and improve healthcare value.

Building on the series of healthcare price transparency surveys conducted in 2015 by Anthony and Research Fellow Scott Haller, Pioneer published a survey of 54 hospitals in six metropolitan areas across the U.S. to compare the cost of a routine MRI procedure. The report found that most of the hospitals surveyed failed to provide price information on their websites, and many insufficiently trained their staff in responding to patients’ price requests. Data showed that cost estimates among those hospitals that provided complete information ranged from \$400 to \$4,500. The study received extensive media coverage in local and national outlets, including *Modern Healthcare*, *Becker’s Healthcare*, *CNBC*, *Healthcare Finance*, *MarketWatch*, *The Washington Post*, and the nationally syndicated investigative news program, *Full Measure*. In addition, Anthony wrote op-eds on the topic that were published in *Mass Lawyers Weekly* and the *Worcester Telegram & Gazette*.

Pioneer also hosted an event with Rob Graybill of Vitals SmartShopper, a price transparency program that allows members to compare costs for procedures at various facilities, and provides cash incentives for choosing less expensive options. The state of New Hampshire has saved roughly \$124 million through the program, and state employees have earned over \$1 million in rewards. The Commonwealth of Massachusetts recently launched a pilot version of SmartShopper to offer the same incentives to 100,000 state employees, and hopes to reap substantial savings for taxpayers.

Another obstacle to healthcare value has been the lack of patient access to medical treatment. A 2013 Pioneer report calling on the Boston Mayor to end the city’s ban on convenient care clinics estimated that allowing more clinics to open could save up to \$6 bil-

The Lovett C. Peters Fellowship

PIONEER INSTITUTE SELECTED NORTHEASTERN UNIVERSITY student, Scott Haller, as the 2016 Lovett C. Peters Fellow in Healthcare Policy. Scott has worked closely with Senior Fellow Barbara Anthony to make Pioneer a leading voice in the Commonwealth and across the country on the urgent need for greater healthcare price transparency. He has authored and co-authored policy research, op-eds, and blog posts, and been interviewed on television news programs. The Fellowship was made possible through the generosity of Pioneer donors and the Peters Memorial effort.



To support future Peters Fellows, please visit our website:

PIONEERINSTITUTE.ORG/DONATIONS/

lion over a decade. The city took an important step in the right direction last year when the Zoning Board of Appeals approved an urgent-care center application in West Roxbury.

A pressing concern for Massachusetts policymakers is the impact of the Affordable Care Act on taxpayers and the state budget. A Pioneer report, featured in *The Boston Globe*, raised concerns about the Health Insurer Provider Fee (HIPF), an excise tax to fund increased Medicaid coverage under the federal health law. The report projected that over the next ten years, the HIPF will cost the state at least \$162 million, and taxpayers \$324 million, in funds that could have been allocated to core services such as public safety, transportation, and infrastructure.

FINDING NEW APPROACHES TO MENTAL HEALTH TREATMENT

Approximately 1 in 5 Americans across every age group experience a mental health issue. The failure to properly identify, diagnose, and support this population costs an estimated \$193 billion in lost earnings each year because of the toll on individuals' and caregivers' quality of life and economic productivity. Pioneer devoted its 2016 Better Government Competition to addressing this problem, and published research raising awareness about the treatment of those with mental illness in the state's prison system. An estimated 20 percent of Massachusetts' total prison population suffers from a mental illness.

One facility, Bridgewater State Hospital, the nation's only hospital run by a corrections department, has been the subject of a documentary and a *Boston Globe* Spotlight investigation for guards' abuse of residents. A Pioneer report, featured in *State House News Service* and *The Springfield Republican*, called on state officials to reform solitary confinement policies and end the practice of housing patients with mental illness in correctional facilities. After the study's publication, Governor Baker announced plans to overhaul the hospital. His administration has dedicated \$37 million to a clinical services contract with a private vendor to ensure patients receive care from staff with behavioral health expertise instead of from correctional officers.

COMBATTING OPIOID ABUSE

The rapid rise in opioid abuse cases in recent years has forced policymakers at the state level and nationally to regard it as a major public health threat. Drug addiction is destroying lives, tearing apart families, and impacting communities. In 2000, there were 338 opioid-related deaths in the Commonwealth; by 2015, that number more than quadrupled to 1,536 deaths, and the trend

2016 IMPACT

With your financial support, Pioneer steered the Massachusetts conversation about healthcare cost away from government-imposed interventions, toward consumer-friendly, market-based initiatives

Our Successes Include:

- Pioneer published a cost transparency series presenting the results of a national research survey of hospitals to measure the level of responsiveness to inquiries about the price of specific services. Researchers concluded the opacity surrounding pricing information significantly contributes to the large variation in costs for identical procedures, ranging from hundreds of dollars to several thousand. These reports have received local and national print and broadcast coverage.
- A Pioneer report opposing the harmful regulation of drug prices halted legislation that would have required that drug companies provide, under oath, proprietary data and face price controls on the development of new medicines.
- Pioneer research warned that taxpayers will be saddled with \$324 million in additional costs over the next decade as a result of a revenue provision of the Affordable Care Act, diverting resources from core services such as public safety, transportation, and infrastructure investments.

has worsened. State officials estimate that opioid abuse costs Massachusetts taxpayers upwards of \$1.5 billion annually. Political leaders and the public are recognizing the need for new approaches to combat this epidemic.

In 2015–16, Pioneer Institute made this issue the focus of its annual Hewitt Healthcare Lecture, a sub-topic of its Better Government Competition, and the subject of research and multimedia communications offering

novel approaches. Pioneer published a case study, based on a 2016 Better Government Competition winning entry, highlighting a promising program at Beth Israel Deaconess Hospital in Plymouth, Massachusetts that could be replicated across the state. The report recommended that hospitals carefully track and aggressively limit the opioids they dispense, and that the state fund its commitment to new detox beds, and increase support for addiction specialists at emergency rooms. The study was distributed at the Hewitt Healthcare Lecture, which featured Massachusetts Health and Human Services Secretary Marylou Sudders, who has led the Baker Administration's efforts on opioid addiction. One of Governor Baker's signature accomplishments has been bipartisan legislation that limits opioid prescriptions and commits over \$250 million to treatment and prevention.

Mental illness and opioid addiction are having a severe impact on Massachusetts families — substance abuse was responsible for 30 percent of child neglect and abuse cases across the state, exacting a hefty toll

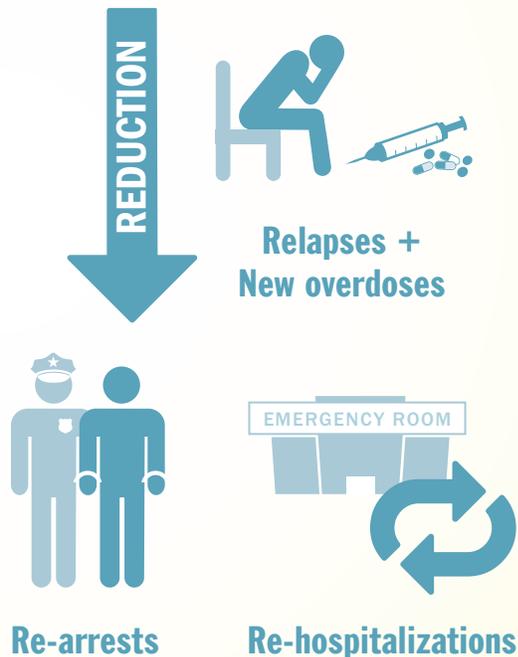
on the already beleaguered Massachusetts Department of Children and Families (DCF). Past mismanagement of DCF has contributed to the tragic deaths of multiple children in the state's care. Pioneer highlighted the need to reform this critical public service at its 2014 Better Government Competition, selecting as that year's winner an organization whose technology enables social services caseworkers to spend more time with families in need rather than filling out paperwork.

In 2016, Pioneer released a report on DCF that recommends upgrading its technology infrastructure and changing its two-tiered case intake system that led to the deaths of ten children whose risk level had been misidentified. The report was shared with state officials, and it received coverage in *The Boston Globe*, *CommonWealth* magazine, *Boston Magazine*, and *Fox 25*. The Baker Administration has since added nearly 200 caseworkers and collaborated with the SEIU local 509 union to implement reforms that Pioneer recommended, such as dropping the two-track approach and improving screening and monitoring practices.

HOW A PLYMOUTH-BASED HOSPITAL IS COMBATING OPIOID ADDICTION IN MASSACHUSETTS

A UNIQUE PROGRAM AT BETH Israel Deaconess Hospital-Plymouth is giving opioid overdose patients multiple opportunities to access detox programs, psychological counseling, anti-abuse drugs and other services, and is proving effective at reducing recidivism, and returning opioid users to more productive lives. This program was selected as a finalist in Pioneer's 2016 Better Government Competition, and was the subject of a Pioneer policy brief.

EARLY RESULTS SHOW





“I’M GRATEFUL TO PIONEER INSTITUTE BECAUSE IT IS NEVER SATISFIED WITH THE STATUS QUO. WE SHARE IN THE COMMITMENT TO EFFECTIVE GOVERNMENT AND A STRONG QUALITY OF LIFE IN THE COMMONWEALTH. CIVIL DISCOURSE IS ESSENTIAL TO ACHIEVING BOTH – AND TO BENDING THE TREND OF OPIOID DEATHS IN MASSACHUSETTS. SIMPLISTIC FIXES WILL NOT BE EFFECTIVE. SUSTAINABLE SOLUTIONS MUST BE OUR GOAL. THAT MEANS WE HAVE TO DISRUPT THE STATUS QUO.”

MARYLOU SUDDERS,
2016 Hewitt Healthcare
Lecturer, Secretary of the
Massachusetts Executive
Office of Health and
Human Services

Hewitt Healthcare Lecture: “Facing Down the Opioid Crisis”

FOR OVER TEN YEARS, PIONEER INSTITUTE HAS BEEN BRINGING TOGETHER experts within the medical community, state and local government, and the non-profit and business sectors to share insights on today’s most urgent public health problems at the annual Hewitt Healthcare Lecture.

The 2016 topic shined the spotlight on Massachusetts’ opioid epidemic, one of the Baker Administration’s major priorities. The Keynote Speaker was Marylou Sudders, Secretary of the Massachusetts Executive Office of Health and Human Services, the largest executive agency in state government. She formerly served as the Commonwealth’s Commissioner of Mental Health, and she established the Commonwealth’s first children’s mental health commission.

From 2010 – 2015, the number of opioid-related overdose deaths in the Bay State has nearly tripled, causing devastation for thousands of families across the Commonwealth. Secretary Sudders discussed Governor Baker’s leadership of a bipartisan coalition of state and local policymakers to combat substance abuse, and his landmark legislation, the STEP Act, that strengthens limits on prescription painkillers, improves early intervention programs, and expands access to treatment and recovery services.

Secretary Sudders’ address was followed by a panel discussion moderated by WBUR’s Senior Correspondent Deb Becker, with experts in behavioral health, medicine, and criminal justice: Cheryl Bartlett, CEO, Alosa Health; Vicker V. DiGravio III, President/CEO, Association of Behavioral Healthcare; Dr. Dennis Dimitri, President, Massachusetts Medical Society; and Joseph D. McDonald, Jr., Plymouth County Sheriff.

Hewitt Lectures over the years have focused on healthcare price transparency, the Affordable Care Act, Medicare and Medicaid reform, and cost control, with experts such as Robert Kaplan, Regina Herzlinger, Jeffrey Flier, Jonathan Gruber, Donald Berwick, Avik Roy, and many more.

To learn more about corporate and individual sponsorship opportunities for our next Hewitt Healthcare Lecture, please contact Brian Patterson, Director, Annual Fund.

Top Left: Teak and Chuck Hewitt Top Right: Jim Stergios, Nancy and Bob Anthony, Elizabeth Childs, Rosann Fleischauer Bottom Left: Lingling Fan and David Morales Bottom Right: Dr. Emma Stanton and Katherine Record



RESTORING TRUST IN STATE & LOCAL GOVERNMENT

Public Transit, Higher Education, & Accountability

MASSACHUSETTS' CITIZENS WANT effective and efficient government, at all levels, that focuses on their priorities, not those of special interests. Through research, media relationships, and meetings with state leaders, PioneerPublic's team of experienced analysts has made the Institute an indispensable voice, and much sought-after resource for investigative reporters, elected officials, and the general public on the issues that matter most to them. In the past year, PioneerPublic has fended off powerful advocates who have loudly demanded more state revenue for expansion projects at both the MBTA and the state university system, despite multi-billion-dollar maintenance backlogs. The Institute has garnered nearly 1,000 media mentions and op-ed placements on these and many other topics, including the dire condition of the MBTA retirement fund, lawmakers' self-exemption from the Open Meeting Law, state employees' abuse of sick-leave policies, and skyrocketing out-of-state enrollment at the University of Massachusetts system.

DRIVING THE CONVERSATION ON MBTA REFORM

Bay State taxpayers and commuters deserve a well-managed public transit system that can remain affordable and become reliable. Pioneer, as a leading member of the "Fix the T" campaign, a coalition of non-profit and business groups, has provided research, engaged the media, and put pressure on Beacon Hill to implement reforms that will disrupt the status quo and improve service in the decades to come.

Since adopting Pioneer's recommendations to establish a Fiscal and Management Control Board to oversee operations and finances, and suspend the anti-competition Pacheco Law, the MBTA has undertaken reforms that have already saved taxpayers hundreds of millions of dollars. The T has updated labor policies to curb

abuse of overtime and sick leave, identified outsourcing opportunities to save money on non-core functions, and cracked down on fare evasion. Through these and other cost-control measures, the T reduced its deficit from \$242 million to \$40 million last year, and invested those savings in winter resiliency and capital maintenance to improve system reliability. Recognizing the T's progress, the Governor recently extended the Control Board's term for two more years, and a former Pioneer research director was named acting General Manager.

Pioneer's Jim Stergios, Greg Sullivan, Mary Connaughton, and Charles Chieppo have delivered testimony at numerous Control Board meetings to underscore the urgency of continued reform, especially with regard to the T's labor costs, which consume nearly three quarters of its operating budget. Pioneer reports found excessive administrative staff expenses compared to peer transit agencies across the country, and projected that an employee sick-leave perk was adding \$50 million to the T's pension liability. The sick-leave report was a featured story in the *Boston Herald*, and led to appearances on *WRKO* and *Boston Herald Radio*. In response, T administrators implemented rules changes resulting in a 30 percent decrease in absenteeism, a 25 percent reduction in overtime since 2013, and fewer dropped bus trips.

"THE GOVERNOR AND THE REGION'S ECONOMIC PROSPERITY HAVE A LOT RIDING ON WHETHER THE FMCB CAN MAKE MEASURABLE PROGRESS IN MODERNIZING THE T. IN MOVING THIS IMPORTANT WORK FORWARD, MY ADVICE IS TO STICK WITH THE RIDERS, AND THAT MEANS THE FMCB MUST GO FASTER ON REFORM AND SLOW DOWN ON FARE INCREASES."

JIM STERGIOS,
The Boston Globe

Taking advantage of the Pacheco Law suspension, the MBTA implemented competitive contracting for its warehouse operations, where costs are expected to drop 40 percent and delivery time for parts has fallen dramatically; and in its cash handling process, where costs are expected to decline from \$11.8 million to \$3.6 million. The MBTA has successfully piloted another Pioneer recommendation to engage with ridesharing companies to provide para-transit services to the elderly and physically impaired, at one-third the cost, for a potential savings of \$47 million a year. MBTA administrators have signaled interest in outsourcing bus maintenance, a 2013 Pioneer proposal, which could result in annual savings of 40 percent, and a 50 percent reduction in maintenance spending.

Another victory was won when MBTA administrators agreed to abandon the use of a risky investment practice that cost the T an estimated \$236 million over the last 14 years. A Pioneer report covered by *The Boston Globe*, *The Reckless Cost of MBTA Financial Derivatives*, called for T leadership to terminate “swap agreements,” financial contracts designed to protect against higher interest rates on MBTA debt but that have proven too expensive. Within months of the report’s release, the Massachusetts Department of Transportation and Fiscal and Management Control boards voted to end these contracts, potentially saving the agency \$100 million over the next decade.

One of the major factors contributing to the MBTA’s fiscal and operational problems is the rising cost of employee benefits. Since 2013, Pioneer has been the leading voice urging a major overhaul of the \$1.5 billion MBTA Retirement Fund (MBTARF), which is facing a \$1 billion shortfall over the next two decades. The fund has made headlines for its secrecy, failed investments, and growing liabilities. In a series of reports and media appearances since 2012, Pioneer has been bringing public scrutiny to the fund’s condition and accounting practices, and calling for greater transparency and significant restructuring. Pioneer op-eds on these issues were published in regional news outlets across the state, including *The Berkshire Eagle*, *MetroWest Daily News*, *New Bedford Standard Times*, and *The Lowell Sun*.

A Pioneer report revealed that MBTA pensions fell from 95 percent funded in 2006 to only 68 percent by 2011, resulting in an unfunded liability that now totals \$868 million. A 2016 report, *The Reckless Cost of Investment Mismanagement at the MBTA Retirement Fund*, estimated that the value of MBTA pensions would have been \$902 million greater had MBTARF’s assets been managed by the state’s Pension Reserves Investment Management Board, beginning in 2000. The fund’s poor condition is due in large part to its higher expenses and risky investment portfolio.

2016 IMPACT

With your financial support, Pioneer promoted efficient & accountable government, pension reform, & performance measurement in the delivery of public services

Our Successes Include:

- After Pioneer publicly put forth the idea, the state legislature moved to install a Fiscal and Management Control Board (FMCB) at the beleaguered Massachusetts Bay Transportation Authority (MBTA). The FMCB is charged with operational, financial, and managerial oversight.
- The Institute uncovered rampant sick-time abuses at the MBTA and brought the issue to the attention of the FMCB, prompting immediate overhauls.
- At Pioneer’s recommendation, the state legislature suspended the archaic Pacheco Law, which prevented government agencies from outsourcing MBTA core functions to private entities capable of performing the same work at a much lower cost.
- Amidst announcements of tuition and fee hikes and a request for increased state appropriations, Pioneer issued a three-part series, *UMass at a Crossroads*, scrutinizing the publicly funded University’s recent and continuing multi-billion-dollar expansion of capital facilities, operating costs, student enrollment trends, \$7 billion deferred maintenance backlog, rising out-of-state enrollment, and overall mission.
- PioneerLegal was formed as the Institute’s public interest legal wing. Its efforts have included recommendations to substantially improve government transparency laws as they apply to the Massachusetts legislature and executive branch, and exploring a legal challenge to compel the state to implement statutes requiring the teaching and testing of U.S. history, among others.

“Help Us Continue To Be A Voice For Riders”

PIONEER’S CAMPAIGN TO FIX THE T IS SHOWING RESULTS; BUT THERE is so much more to do. Over one hundred thousand riders depend on the commuter rail for transportation to and from the city each day, but have had to endure frequent cancellations and delays due to insufficient staffing, defective equipment, and train shortages. Instead of holding Keolis Commuter Services accountable for its poor performance, the state has waived most of the operator’s \$14 million in fines, and has even agreed to pay an additional \$66 million on top of Keolis’ \$2.68 billion contract.

“THE MBTA COMMUTER RAIL HAS A LOT OF WORK TO DO. THEY NEED TO GAIN THE PUBLIC’S CONFIDENCE THAT THEY CAN GET TO WORK ON TIME, AND THAT THEY CAN GET HOME ON TIME. WHEN THEY’RE NOT MEETING THE BASIC STANDARDS OF THEIR AGREEMENT, THAT’S WHEN PEOPLE SAY WAIT A MINUTE, FIX IT BEFORE YOU INCREASE MY FARE.”

MARY CONNAUGHTON ON
COMMUTER RAIL PERFORMANCE
CBS-Boston: February 19, 2016

pressing for a more effective and open procurement process that will attract more high-quality bidders, and plans to weigh in on the type of contract that might promote better service and modernization.

Help us continue our work to improve all modes of public transit. The Baker administration is working to implement many of the reforms we have proposed, saving taxpayers hundreds of millions of dollars and improving operations.

Since 2013, Pioneer has published a steady stream of research, op-eds, and blog commentary critical of the procurement process that led to only two commuter rail bidders; urging stricter enforcement of penalties for Keolis’ poor performance; and calling for re-opening the current contract. Mary Connaughton and Greg Sullivan have made numerous TV and radio appearances providing a voice for the commuters who have had to face this injustice every day.

This year, in a welcome development, the MBTA announced that it will not automatically renew its contract with Keolis Commuter Services when the term ends in 2022. Pioneer looks forward to



Fox 25: Greg Sullivan on MBTA commuter rail on-time performance (Feb 21, 2016)

“THERE IS A 60-FOOT WALL OF SMOKE AND MIRRORS BETWEEN THE REAL LATE TRAIN DATA AND WHAT’S REPORTED TO THE PUBLIC. THAT’S A STEP BACKWARDS. YOU DON’T IMPROVE BY LOWERING YOUR GOALS.”



But there’s still much more work to do. Donate to our #FixTheT campaign today!
PIONEERINSTITUTE.ORG/DONATIONS

Contrary to the fund’s claim to be a private trust, three-quarters of its contributions come from the MBTA, which receives considerable state funding. If public dollars were not available to support the plan, T employee contributions would need to increase from 5.5 percent to 25 percent, or the system could become insolvent in the next decade.

Recognizing the potential impact on the state budget, policymakers have begun to take action. Last year, a Suffolk Superior Court judge ruled that MBTARF’s records are subject to mandatory disclosure under the public records law. Following that decision, the Massachusetts Legislature passed a law making the fund subject to the state’s public records regulations, which prompted the long-overdue resignation of MBTARF’s executive director. A state Senate panel is seeking to establish a special commission to make recommendations

to rescue the fund, including Pioneer’s proposal, supported by Governor Baker, to shift MBTARF to the state system.

For many Massachusetts commuters who drive to work, rather than taking the T, last year’s successful transition from tollbooths to an all-electronic tolling system on the Turnpike was a major step forward. A Pioneer report, *Driving Innovation: Tolling and Transponders in Massachusetts*, called for exploring transponder use in other states and encouraged greater cooperation between public agencies and the private sector to broaden the application of transponder technology for parking and retail services. The report earned coverage in *State House News Service*, *MetroWest Daily News*, *Lawrence Eagle-Tribune*, *WCVB-TV*, *WBZ*, *WBUR*, *WWLP*, and *NECN*.

PROMOTING AFFORDABLE & SUSTAINABLE PUBLIC HIGHER EDUCATION

Massachusetts students need access to public higher education options that are affordable. Unfortunately, management decisions within the state university system are pushing it beyond the reach of many of the students it is meant to serve. In 2015, Pioneer’s government transparency team began examining the system’s budget and spending, initially publishing blogs and op-eds. After months of investigating, the Institute released an in-depth, three-part series, *UMass at a Crossroads*, that brought even greater scrutiny to the five-campus system’s dramatic rise in out-of-state enrollment and capital expansion.

Overall, UMass enrollment increased by 27 percent between 2005 and 2014, compared to less than 2 percent at other New England state universities, and 14 percent at U.S. public universities. Between 2008 and 2014, out-of-state enrollment increased by 84 percent across UMass campuses, compared to 19 percent for in-state students. The pursuit of out-of-state and international students who pay higher tuition to generate additional revenue is a nationwide trend at public universities, with some states imposing caps and penalties to curb the practice. But Pioneer research shows that higher out-of-state charges hardly cover the full cost per student at UMass.

The series’ authors also explored the financial sustainability of the system’s massive expansion projects.

BUILDING ON ITS RECORD AS A PUBLIC POLICY TREND-setter, Pioneer Institute broke the story on UMass’s out-of-control capital expansion and spending that triggered an ongoing *Boston Globe* series and a seismic shift in state leaders’ and influencers’ perceptions of public higher education funding needs and priorities.

The Western Interstate Commission for Higher Education Forecasts

NUMBER OF HIGH SCHOOL GRADUATES WILL

↓ 11.4% from 2015–16 to 2027–28

In spite of these projections, UMass has continued to



UMASS



GROW ENROLLMENT



EXPAND ITS CAPITAL FACILITIES

PUBLIC COLLEGES CHASE OUT-OF-STATE STUDENTS & TUITION

“In Massachusetts, out-of-state enrollment has increased by nearly 85 percent at University of Massachusetts campuses since 2008, while in-state enrollment grew by only 19 percent, said a recent critical report by the Pioneer Institute, a Massachusetts think tank.”

July 7, 2016

The New York Times

“IT ISN’T RIGHT THAT UMass WOULD GO THROUGH THIS PROCESS OF ENORMOUS EXPANSION AND THEN, AT THE END OF IT, TURN AROUND TO THE LEGISLATURE AND SAY, WE HAVE A HUGE DEFERRED MAINTENANCE PROBLEM, WE HAVE AN OLD CAMPUS, GIVE US MONEY. THE FOLKS WHO ARE GOING TO PAY FOR THAT ARE THE TAXPAYERS AND STUDENTS THROUGH TUITION.”



GREG SULLIVAN,
WCVB-TV

“REMINISCENT OF THE MBTA, UMass’s DEBT HAS MORE THAN TRIPLED TO NEARLY \$3 BILLION AND SUPPLANTED NEEDED MAINTENANCE INVESTMENTS.”

JIM STERGIOS,
Worcester Telegram & Gazette



UMass carried out a \$3.8 billion capital expenditure plan, funded mainly through debt, from 2005 to 2014, while its deferred maintenance backlog, which Pioneer compared to that of the MBTA, grew from \$2.7 billion to \$3.3 billion. Pioneer's series brought to light UMass leadership's habit of turning to the state for emergency funding for deferred maintenance — only after having exhausted its capital funding on system expansion. The series also found that, despite mounting debt and projected declines in the number of Massachusetts high school graduates, UMass was planning to accelerate its capital expansion by \$7 billion between 2015 and 2019, with only 11 percent of that total allocated to deferred maintenance and no funding source identified for half of the projects.

While UMass's President and Trustees were threatening to raise tuition and demanding more state support, despite receiving \$655 million last year, Pioneer was the only voice raising hard questions about the system's purpose and strategy, and whether its expensive building boom, predicated on increased enrollment of largely out-of-state students, is truly in the best interests of the Commonwealth. Pioneer's series earned coverage in *The New York Times*, *The Boston Globe*, *WCVB-TV*, *WFXT*, *WBUR*, *NECN*, *WWLP*, *The Boston Business Journal*, the *Associated Press*, *The Springfield Republican*, *The Lowell Sun*, and *State House News Service*; and op-eds were placed in regional news outlets across the state. In response, UMass implemented changes in management; and the Massachusetts Secretary of Education recently announced a new process for allocating funds and evaluating capital projects at UMass, adding a long-overdue layer of public accountability to the system's strategic, financial, and capital planning.

ADVANCING THE PUBLIC'S INTEREST THROUGH OPEN GOVERNMENT

A well-functioning government and a vibrant democracy require accountability and vigorous public engagement. But when our elected officials shroud their actions and meetings in secrecy, they erode the people's trust. Historically, Massachusetts has ranked at or near rock bottom nationally in terms of open government. For years, Pioneer Institute's Mary Connaughton has been leading a team that has been publishing a steady flow of blog commentary, as well as op-eds and media appearances, in hopes of improving the Commonwealth's commitment to transparency.

Pioneer supported state legislation in 2016 that brought about long-overdue public records reform. Though weakened by compromise, the law included many improvements, including: subjecting the MBTA Retirement Board to public records law and making its

operations transparent, establishing a public records officer for every agency, promoting electronic records in response to Freedom of Information Act requests, imposing stronger penalties on delinquent agencies, promoting electronic disclosure, and reducing costs to obtain public records.

Unfortunately, the final legislation omitted several important elements from the original bill, such as ending the Legislature's self-exemption from open meeting and public records laws, and requiring that legislators and candidates post Statements of Financial Interest online. Pioneer sent open letters to Governor Baker, calling for his office to end its exemption from public records laws and Attorney General Maura Healey, urging her to issue an informal advisory opinion on the constitutionality of the legislative self-exemption from the Open Meeting Law. The Attorney General refused to render an opinion, prompting news coverage in the *Boston Herald*, the *Associated Press*, *State House News Service*, *Massachusetts Lawyers Weekly*, and *The Springfield Republican*.

Pioneer also provided key information for a *Boston Business Journal* investigative story on a Bridgewater State University top official's accumulation of \$1 million in unused sick and vacation time to inflate his pension. The story led to probes by the Massachusetts Department of Higher Education and state Auditor. The Baker administration pledged to undertake a statewide review of sick-time cashout policies, after the airing of this story and a subsequent *WCVB-TV* investigation featuring



“IN THE PRIVATE SECTOR IT'S TYPICALLY A USE-IT-OR-LOSE IT POLICY — IF YOU DON'T USE YOUR SICK TIME, YOU LOSE IT. THERE ARE A LOT OF GOOD WAYS TO SPEND THAT MONEY: TO IMPROVE EDUCATION, TO IMPROVE PUBLIC SAFETY.”

**MARY CONNAUGHTON,
WCVB-TV**

Pioneer’s Mary Connaughton, which found that state workers had collected \$157 million in unused sick time pay since 2006.

The 2016 Government Transparency team, overseen by Mary Connaughton, delivered over three dozen Pioneer blog posts on a wide variety of topics ranging from transparency at Massachusetts nursing homes and spending on athletics at UMass Amherst, to property tax increases, community policing, casino revenue projections, theater tax credits, and commuter rail performance.

Another important part of PioneerPublic’s government transparency work is PioneerLegal, the Institute’s public-interest law initiative, led by John Sivoella, Senior Fellow in Law and Policy. It aims to support economic freedom, government accountability, and educational choice through amicus briefs, open letters, legal research memoranda, FOIA filings, and suggested revisions to certain regulations and statutes.

sions to certain regulations and statutes.

PioneerLegal joined forces with WilmerHale, LLP, to submit an amicus brief supporting the defendants in a case, *SEIU, Local 509 v. Massachusetts Department of Mental Health et al.*, involving the anti-privatization Pacheco Law, that was argued before the Supreme Judicial Court. PioneerLegal joined another amicus brief in *Brott vs. U.S.*, a case before the U.S. Court of Appeals for the Sixth Circuit involving a claim by 22 families and small-business owners in Michigan that the federal government took their land through eminent domain without compensation, in violation of the Fifth Amendment. PioneerLegal has also assisted in issuing open letters to the Governor’s Office and the Office of the Attorney General calling for reforms to public records laws, and provided critical legal research for Pioneer’s proposed changes to the MBTA’s use of final and binding arbitration in employee contract disputes.

At Your Fingertips: PioneerPublic’s Government Transparency Toolkit

PIONEER INSTITUTE IS PROMOTING GOVERNMENT transparency by expanding public access to information, educating citizens, and encouraging public engagement through a suite of free online tools. The Institute enhanced these tools this year, releasing new versions of MassPensions.com and MassAnalysis.com, as well as introducing MBTAAnalysis.com.

NEW TOOL FOR A RELIABLE COMMUTE INTRODUCING MBTA ANALYSIS

MBTA Analysis is a user-friendly web application that gives Bay State policymakers and citizens a way to compare their transit services to agencies around the nation. This tool includes the most recent information available from the National Transit Database, with visualizations of a broad range of metrics, including capital expenditures, operating expenses, and operating efficiencies, by both year and travel mode.

MBTA Monthly Measures			
	Operating Expenses	Capital Expenditures	Service Me
Massachusetts Bay Transportation Authority (ME			
2015: Totals for Entire Year			
Travel Mode	Unlinked Passenger Trips	Passenger Miles	Average Trip Length
Bus	885,770	2,021,569	2.28
Bus	121,594,214	314,206,884	2.58
Bus Rapid Transit	9,979,893	15,479,187	1.55

Updated! [MassPensions.com](#) links users with the data they need to hold public officials accountable for the financial performance of state and local pension systems in the Commonwealth. It offers a variety of metrics, including the funds’ assumed rate of return, asset allocation, and investment performance based on the most recent publicly available data. The tool also reveals total administrative costs by member of each fund.

Updated! [MassAnalysis.com](#) provides detailed information about each town and city in the Commonwealth, ranging from revenue and expenditure levels to employment and crime rates. This site is a useful tool for town administrators, and can reveal statewide trends in such issues as state revenue levels and property tax rates. It includes a function that allows each town’s performance to be measured against peer communities.

[MassOpenBooks](#) gives users easy access to state employee salary and pension information, and payments made by government agencies to businesses and people. Users can also make comparisons between departments, and access a range of analytical tools.

[MassReportCards](#) allows parents seeking better educational choices for their children, and teachers and administrators who want to know how their school stacks up, to do their own homework about their local public schools and school district. They can analyze their performance and compare them with other schools from across Massachusetts.



Improving Care for Individuals Living with Mental Illness

THE BETTER GOVERNMENT COMPETITION IS ONE OF THOSE longstanding Pioneer Institute initiatives that takes a constant, steady, research-based approach to critical questions that go to the heart of how we govern ourselves. Every year, Pioneer addresses a major issue and crowdsources the best ideas from experts and ordinary citizens all across the country to make a real impact on people's lives. Implementation of winning entries has saved Massachusetts taxpayers over \$750 million and driven numerous state and federal policy changes that have increased government efficiency, advanced prosperity, and ensured healthier and safer communities.

Pioneer's 25th annual Better Government Competition focused on innovative ideas to improve care for individuals living with mental illness. Submissions were reviewed by a distinguished panel of judges including: Dr. Elizabeth Childs, M.D., M.P.A., Adult/Child/Adolescent Psychiatrist; Frederic M. Clifford, Pioneer Institute Board of Directors; Kathleen M. Dennehy, National Council on Crime & Delinquency, Former Commissioner, Massachusetts Department of Correction; Vicker V. DiGravio, III, President and CEO, Association for Behavioral Healthcare; and Matt Selig, Esq., Executive Director, Health Law Advocates.

The winning Better Government Competition entry was the North Carolina Mobile Medication Program, a pilot project that provides home visiting support to help ensure continuity of care for adults with severe psychiatric illness. Finalists included The Psychosis Identification and Early Referral Model in Portland, Maine; the Minnesota-based TXT4Life Suicide Prevention Program; The Behavioral Health Justice Center in San Francisco; and The Integrated Healthcare and Substance Use Collaborative at Beth Israel Deaconess Hospital in Plymouth, Massachusetts.

A June awards gala featured Pennsylvania Congressman Timothy Murphy as keynote speaker. Dr. Murphy, a best-selling author, has three decades of experience as a psychologist specializing in child and family treatment. He has gained recognition as a passionate advocate for meaningful reforms in the U.S. healthcare system. During his address, he shared the key provisions of the historic mental health reform legislation that he sponsored, and the experiences and conversations that shaped and inspired his focus on this issue.



"I BELIEVE THAT THE SOONER WE CAN BREAK DOWN THE STIGMA OF MENTAL ILLNESS AND ACCEPT OUR SHARED HUMANITY AROUND THIS ISSUE, AND NOT THINK OF PEOPLE AS PROBLEMS TO BE FIXED BUT AS FELLOW PATIENTS STRIVING TO STAY A STEP FAR ENOUGH AHEAD OF THE BEAST WITHIN, THE SOONER WE'RE APT TO DESIGN POLICIES AND PROGRAMS THAT WORK — THE KIND OF SYSTEM THAT WE WOULD WANT FOR OURSELVES AND OUR FAMILIES."

JULIA WACKER,
*North Carolina Hospital
Foundation, Winner,
2016 Better Government
Competition*

Reducing Recidivism and Lowering Costs in Our Prison System

Pioneer shared the 2015 winning Better Government proposal, Five Keys Charter School's "Reducing Recidivism through Education," with Massachusetts policymakers, and was pleased to see Governor Baker's administration adopt a similar program. The San Francisco-based school run by the Sheriff's Department provides full-time education to adult inmates. It offers community college dual-enrollment programs and vocational training to 8,000 enrollees annually, and has reduced violence and recidivism.

In May 2016, the Massachusetts Executive Office of Public Safety and Security launched the "School of Reentry" program. Much like Five Keys Charter School, it provides education, vocational training, job counseling, and other important skills to help inmates successfully transition back into society. This is a significant step forward in improving the quality of life for all Massachusetts residents.



“I MADE A PROMISE TO THE FAMILIES OF THE HUNDREDS OF THOUSANDS OF HOMELESS AND IMPRISONED, AND THE FAMILIES WHO ARE STRUGGLING WITH UNTREATED MENTAL ILLNESS, THAT WE’RE GOING TO DO SOMETHING ABOUT IT, AND THAT CONGRESS IS NOT GOING TO STAND BY IDLY ANYMORE. WE HAVE TO LET PEOPLE KNOW THAT WE’RE GOING TO BREAK THE STIGMA OF MENTAL ILLNESS — NOT THROUGH SLOGANS, BUT THROUGH REAL, EVIDENCE-BASED TREATMENT WHERE PEOPLE KNOW THAT IF THEY GET CARE, THEY CAN GET BETTER.”



CONGRESSMAN TIMOTHY MURPHY,
2016 Better Government Competition Awards Gala

LESS THAN TWO WEEKS AFTER THE gala, Rep. Murphy’s landmark mental health reform legislation, the Helping Families in Mental Health Crisis Act, won passage in Congress. The legislation received bipartisan support from national organizations and praise from media outlets across the country, including the American Psychiatric Association, the National Alliance on Mental Illness, CNN, The Wall Street Journal, and The Washington Post.

AT THE BETTER GOVERNMENT COMPETITION Awards Gala, Pioneer Institute recognized longstanding supporters **Charles Baker, Sr.** and **Elizabeth Powell.**

Charles Baker, Sr., was given moving tributes at the reception and dinner by his son, Massachusetts Governor Charles Baker, Jr., and by Pioneer Executive Director Jim Stergios. Baker served in the Nixon administration in Health and Human Services and Transportation. He is Professor *Emeritus*, Northeastern University College of Business Administration. Elizabeth Powell, also honored, has had a distinguished career in the manufacturing industry and in public service. She has served on numerous boards, including the Babson Global Advisory Board and The Fletcher School of Law & Diplomacy Advisory Board.



Top Left: Bob and Sally Croce Top Right: Mark King, Frederic Clifford, Kathryn McCarron, Sally Wilde, Gary Kearney, Judy Holden, Seated: Judith King, Peter Holden, Barbara Clifford, Bill Carey, Peter Wilde Bottom Left: Mark Rickabaugh, Diane Schmalensee, Howard Stevenson Bottom Right: Lucy Gerhart, Christina Townsend, and Augusta Ayer



CLEARING THE PATH FOR INNOVATION & GREATER PROSPERITY

EXPANDING OPPORTUNITY REQUIRES greater focus on reforms to our education and healthcare services, and the structure of our welfare programs. The Commonwealth must also safeguard the freedom of entrepreneurs — whether the owner of a local *bodega* or a techie developing a new way to meet consumer demand — to take and be rewarded for risks. And the state must deliver on infrastructure investments and policy changes to catalyze growth in economically lagging regions.

Massachusetts, which ranked number one on Bloomberg's 2016 U.S. State Innovation Index, has long been a place where invention and ingenuity thrive. Pioneer's research in economic opportunity has focused on ensuring that the Commonwealth continues to welcome and encourage a competitive business climate that spurs job growth. Through meetings and media appearances on ridesharing regulations and urban revitalization, Pioneer helped stave off burdensome barriers to consumer choice. In 2016, the Institute also continued to highlight new ideas to expand economic opportunity to cities beyond the metro Boston region.

UNLEASHING INNOVATION & CONSUMER CHOICE IN TRANSPORTATION

In cities across America, policymakers have been putting up regulatory roadblocks that restrict customer options and limit competition in the ridesharing industry. Transportation network companies such as Uber and Lyft have been battling overly burdensome regulations, and in some cases, have had to abandon major markets. Massachusetts was bracing for a showdown last year, but thanks to a compromise bill passed by the state legislature that drew on Pioneer proposals, a sensible framework has been implemented that protects both market innovation and public safety. As lawmakers were on the

verge of passing the new law, Pioneer released studies recommending reforms that would maintain consumer choice, and modernize the taxicab industry.

In *Important Considerations for Regulating Ridesharing in Massachusetts*, authors Matt Blackbourn and Brendan Murphy praised some of the bill's public safety protections, but brought attention to a provision that would have unfairly prohibited ridesharing companies from making pick-ups at Logan Airport and the Boston Convention and Exhibition Center. In a major victory for customers, the ridesharing regulations signed into law omitted this provision.

Pioneer also supports reforms that would increase flexibility and market competitiveness for the taxicab industry, which has been forced to conform to minimum municipal rates that are not applicable to ridesharing companies. In a Pioneer report, *Leveling The Playing Field: The Need for Taxi Reform in the Commonwealth*, authors Greg Sullivan and Matt Blackbourn recommended shifting the taxi industry away from this fare-setting system; transferring regulatory oversight of all Greater Boston-area taxis to a regional, metropolitan authority that would consolidate high-volume municipal service areas; and allowing taxis to make street hail pick-ups in communities beyond their licensing municipality.

BUILDING PROSPERITY BEYOND BOSTON THROUGH INCENTIVES FOR LOCAL REFORM

The Commonwealth has increasingly become a tale of two states — the Greater Boston area enjoys success, while historic urban centers to the north, south, and west face economic and social challenges that have gone unaddressed. Over the past decade, Pioneer has explored some of the factors contributing to this disparity, comparing trends in population, income, crime, and education in 14 communities across the state, known as



“WHEN YOU LOOK AT THE WAY THAT TAXIS HAVE HISTORICALLY FUNCTIONED, THEY HAVE BEEN ESPECIALLY SLOW TO ADOPT TECHNOLOGICAL IMPROVEMENTS THAT CONSUMERS HAVE LONG CALLED FOR. THERE’S NO INCENTIVE TO MEET CONSUMER DEMAND, BECAUSE THEY WEREN’T WORRIED ABOUT LOSING ANY MARKET SHARE.”

MATT BLACKBOURN,
Insurance Business Magazine

“Middle Cities.” Most of these cities, such as Brockton, Chicopee, Lawrence, New Bedford, and Worcester, have populations of over 40,000 and average per-capita annual incomes of below \$25,000.

Nearly 50 percent of the revenues in the Middle Cities come from the state. In four of these communities, the Commonwealth provides more than half of the local revenue base. Almost 40 percent of all local aid goes to the Middle Cities, which make up less than 17 percent of the state’s population. Despite this investment, many of these cities have experienced declines in population, property values, and overall economic health in the past several years, and they are struggling to reverse persistent achievement gaps in education, public safety problems, poor fiscal management, infrastructure degradation, high concentrations of poverty, and a disproportionate need for social services.

Pioneer issued a two-part series of studies to underscore the urgency of improving outcomes in these cities. In *Ten Years Later: Trends in Urban Redevelopment*, author Aaron Beitman updated a 2006 review of longitudinal data on these communities’ education performance, economic growth and earnings, public safety, and financial management. The study found that in most of these cities, per-capita and median household income declined, and property value increases lagged far behind the state average. Two cities, Taunton and Leominster, have seen improvement over the last decade, with rising populations and incomes, better educational outcomes, and declining crime rates, and should be used as models for improvement in the other municipalities.

The second part of the series, *A New Start for Massachusetts’ Middle Cities*, authored by Pioneer Executive Director Jim Stergios, called for the creation of a targeted infrastructure program to help revitalize these communities. The report proposed a \$20 million Infrastructure Investment Fund that would use excess

2016 IMPACT

With your financial support, Pioneer promoted public policies that keep Massachusetts competitive by creating jobs and by reducing the cost of living and doing business.

Our Successes Include:

- Pioneer research advocating for the modernization of the taxicab industry has informed state regulators on the efficiencies of the ridesharing industry, and helped preserve space in the transportation market for new entrepreneurs.
- Pioneer researchers developed an analytic framework that was presented to Massachusetts business leaders based on the concept of *Boston as a Global City*. Preliminary analysis delved into multiple factors shaping Boston’s economic competitiveness and its ripple effect across the state.
- With the incorporation of all-electronic tolling and the elimination of the Massachusetts Turnpike toll booths, a Pioneer white paper called on state leaders to embrace and promote transponder technology — boosting its market share for a wider variety of applications such as parking and retail services.

A Tale of Two States: Snapshot of Massachusetts Middle Cities

- Per-capita income in the Middle Cities is between 31 percent and 66 percent below the statewide average and has been falling for over 30 years. It was 82 percent of the state average in 1979, but fell to 53 percent by 2009.
- All 14 cities underperform state averages on MCAS. In math, more than 15 percent of Middle Cities' students scored in the "Warning/Failing" category — nearly double the state average.
- The dropout rate in Middle Cities is nearly twice the state average.
- State property values grew at an annual rate of 7.92 percent between 1992 and 2012, compared to just 2.66 percent for Middle Cities.
- Population in the 14 cities fell by 0.3 percent from 1970 to 2013, compared to 17.6 percent growth for the state population. In western Massachusetts, Chicopee, Holyoke, and Pittsfield saw decreases of 16 to 22 percent.



FROM 1970 - 2013 SAW
POPULATION DECREASES OF

16 - 22%

“WHAT WE’VE SEEN OVER THE LAST 10 YEARS, NOTWITHSTANDING SOME REALLY GOOD EFFORTS, IS NOT MUCH PROGRESS, IF ANY, IN PUTTING THESE CITIES ON A DIFFERENT TRAJECTORY. MOST ECONOMIC DEVELOPMENT POLICIES HAVE BEEN CRAFTED IN THE IMAGE OF BOSTON AND CAMBRIDGE. WE ACTUALLY HAVE TO CRAFT POLICIES IN EDUCATION, ECONOMIC DEVELOPMENT, CRIMINAL JUSTICE, AND PUBLIC SAFETY, WHICH REPRESENT THE ENTIRE STATE AND NOT JUST GREATER BOSTON.”

JIM STERGIOS,
Springfield Republican

money drawn from the Massachusetts Convention Center Fund to jumpstart economic activity in the Middle Cities. It would be offered in exchange for cities working to modernize their delivery of critical services and enacting reforms in education, public safety, economic development, and fiscal management. The white paper’s release coincided with a legislative hearing of the Joint Committee on Economic Development and Emerging Technologies on the Baker administration’s \$1 billion economic development package.

Pioneer’s proposal was well received by local leaders in municipalities across the state, who appreciated the attention brought to the challenges they face and the call for positive change. Jim Stergios presented the findings in meetings with the Baker administration, city officials, MassDevelopment, and a MassInc forum on investing in Gateway Cities. The reports earned press coverage in *The Springfield Republican*, *The Brockton Enterprise*, *The Taunton Daily Gazette*, *The Worcester Telegram & Gazette*, the *Fitchburg Sentinel & Enterprise*, and *WBZ* radio.

Events

A CATALYST FOR CIVIL DISCOURSE & ROBUST CIVIC ENGAGEMENT

A VITAL ELEMENT OF PIONEER INSTITUTE’S mission involves convening the top experts in academia, medicine, law, economics, the media, politics, and many other fields to exchange ideas and facilitate open discussion that informs the general public about the most important policy challenges facing the Commonwealth and the country. Throughout the year, the Institute sponsors lively and well-attended public forums featuring Pulitzer-winning scholars and historians, festive galas keynoted by nationally recognized thought leaders, and more intimate cocktail receptions and luncheons covering an array of timely public interest topics.

The **Hewitt Healthcare Lecture**, named in memory of past Pioneer chairman, Colby Hewitt, is held each spring at Harvard Medical School. The event draws market innovators with diverse points of view for a lively debate focusing on state and national healthcare policy,

usually moderated by greater Boston radio and television personalities, or industry leaders.

The **Better Government Competition Awards Gala** is the culmination of a year-long effort to crowdsource the country’s greatest proposals to address urgent issues impacting everyday citizens. The winners and finalists are recognized at a prestigious ceremony held each June, with a high-profile keynote speaker, before an audience of Boston’s most influential leaders and community stakeholders.

The **Lovett C. Peters Lecture** in Public Policy is named for Pioneer’s intrepid founder and chairman, “Pete” Peters, who sought to reward the Institute’s core supporters by welcoming them to an exclusive dinner and reception each year honoring individuals who demonstrate true vision and ingenuity, and whose work galvanizes meaningful improvements to our society.

Top Left: Bob & Nancy Anthony **Top Right:** Under Construction, Harvard's University's a cappella group **Bottom Left:** Josie Hewitt Marston & Teak Hewitt **Bottom Right:** Harry & Donna Storer with Steve Mead



2016 Events



“BIG BUSINESS & BIG LABOR: TEACHING U.S. ECONOMIC HISTORY IN SCHOOLS”

January 25, 2016

T.J. Stiles, author,
The First Tycoon: The Epic Life of Cornelius Vanderbilt

Philip Dray, author,
There Is Power in a Union: The Epic Story of Labor in America

Public Forum

“THE AGE OF JACKSONIAN DEMOCRACY: TEACHING ANTEBELLUM AMERICA IN SCHOOLS”

April 6, 2016

Daniel Walker Howe, Rhodes Professor of American History Emeritus, Oxford University and UCLA, and author, *What Hath God Wrought: The Transformation of America, 1815–1848*

David & Jeanne Heidler, co-authors, *Old Hickory’s War: Andrew Jackson and the Quest for Empire*

Alan Taylor, Thomas Jefferson Memorial Foundation Professor of History, University of Virginia, and author, *The Internal Enemy: Slavery and War in Virginia, 1772–1832*

Public Forum

“PATHWAYS TO EQUAL OPPORTUNITY: VOCATIONAL-TECHNICAL EDUCATION & THE LIBERAL ARTS”

October 19, 2015

Jacqueline Moore, Professor of History, Austin College, Texas and author, *Booker T. Washington, W.E.B. Du Bois, and the Struggle for Racial Uplift*

Robert Norrell, Professor of History, University of Tennessee and author, *Up from History: The Life of Booker T. Washington*

Brian Johnson, President, Tuskegee University

Public Forum

“A CONVERSATION WITH PIONEER”

January 22, 2016

Member & News Leader Luncheon

2016 HEWITT HEALTHCARE LECTURE: “FACING DOWN THE OPIOID CRISIS”

April 20, 2016

Marylou Sudders, Secretary, Massachusetts Executive Office of Health and Human Services

Deborah Becker, Senior Correspondent, *WBUR*

Cheryl Bartlett, CEO, Alosa Health

Vicker V. DiGravio III, President/CEO, Association of Behavioral Healthcare

Dr. Dennis Dimitri, President, Massachusetts Medical Society

Joseph D. McDonald, Jr., Sheriff, Plymouth County

Signature Event



“BEST PRACTICES FROM URBAN CHARTER PUBLIC SCHOOLS”

May 4, 2016

Deborah McGriff, Managing Partner, NewSchools Venture Fund

Janet Wu, State House Reporter, *WCVB NewsCenter 5*

Cara Stillings Candal, Senior Fellow, Pioneer Institute

Public Forum



OVERVIEW OF PIONEER INSTITUTE

October 29, 2015

Member Reception

A CONVERSATION WITH MATT BEATON, SECRETARY, EXECUTIVE OFFICE OF ENERGY & ENVIRONMENTAL AFFAIRS

April 26, 2016

Member Luncheon

October

January

February

March

April

“BACK ON TRACK: AN UPDATE ON MBTA REFORM”

May 24, 2016

Brian Shortsleeve,
Chief
Administrator,
MBTA

*Member
Breakfast*



“MOVE THIS PORTRAIT: THE KNOW-NOTHINGS’ GOVERNOR AND BARRIERS TO SCHOOL CHOICE”

August 1, 2016

Raymond Flynn, Former Mayor of Boston
and Ambassador to the Vatican
Jason Bedrick, Policy Analyst, Cato Institute,
Center for Educational Freedom
Grace Cotter Regan,
Head of School, St. Mary’s Lynn
Gerard Robinson, Resident Fellow, American
Enterprise Institute

Public Forum

“HOW TO SAVE IN HEALTHCARE & PAY PATIENTS IN THE PROCESS”

May 26, 2016

Rob Graybill, Vice President, Vitals SmartShopper

Public Forum

MEMBER & NEW LEADER LUNCH

July 19, 2016

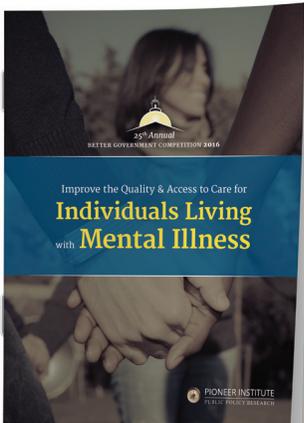
John P. DiNatale, private
investigator and author,
The Family Business

Member Luncheon

YOUNG PROFESSIONALS NETWORKING EVENT

August 18, 2016

*New Leader
Reception*



25TH ANNUAL BETTER GOVERNMENT COMPETITION AWARDS GALA

June 20, 2016

Pennsylvania Congressman
Timothy Murphy

Signature Event

“EQUAL ACCESS TO EXCELLENCE: CHARTER & DISTRICT SCHOOL REFORM”

September 19, 2016

Cheryl Brown Henderson,
American Civil Rights
Activist and daughter
of Rev. Oliver Brown,
plaintiff in *Brown v. Board
of Education* Supreme
Court case

Nina Rees, President,
National Alliance
for Public Charter Schools

Dr. James Lynn
Woodworth, Qualitative
Research Analyst, CREDO,
Stanford University

Public Forum



LOVETT C. PETERS LECTURE: “GLOBAL SECURITY, OPPORTUNITY & LEADERSHIP IN THE 21ST CENTURY”

November 12, 2016

James Stavridis,
retired U.S. Navy Admiral
and Dean, The Fletcher
School of Law and
Diplomacy

Signature Event



“BOSTON AS A GLOBAL CITY” May 6, 2016

Luncheon

May

June

July

August

September

November



Lovett C. Peters Lecture

Global Security, Opportunity & Leadership in the 21st Century

PIONEER INSTITUTE'S 19TH ANNUAL LOVETT C. PETERS Lecture in Public Policy recognized Retired Four-Star Admiral James Stavridis, Dean of the prestigious Fletcher School of Law and Diplomacy at Tufts University.

Timed just one week after a pivotal and turbulent presidential election, Admiral Stavridis' address provided a clear-eyed appraisal of America's role on the world stage, drawn from his 30-year naval career. He distinguished between the nation's real and perceived global threats, urged greater understanding of foreign cultures, and suggested some emerging partnership and coalition opportunities.

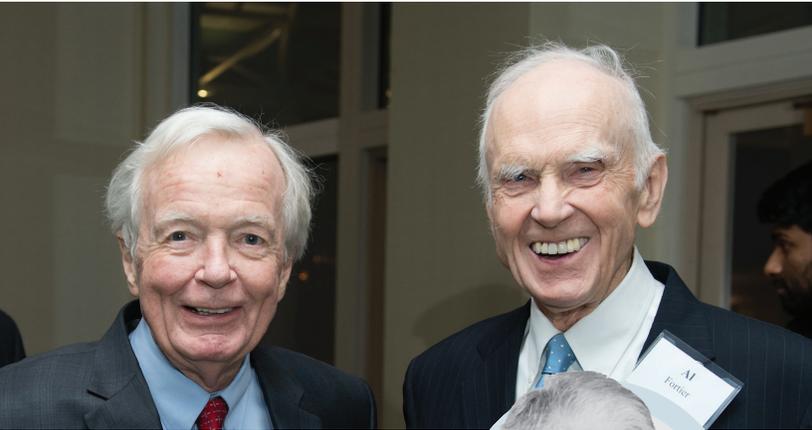
Admiral Stavridis served as Supreme Allied Commander at NATO, and head of the U.S. Southern Command and the U.S. European Command. Currently, he chairs the Board of the U.S. Naval Institute, and has published six books and over one hundred journal articles on leadership, Latin America, maritime affairs, and innovation. His counsel was sought by both major presidential candidates, and he has been vetted for posts at the highest levels of government.

The Lovett C. Peters Lecture, named in honor of Pioneer Institute's founder, Lovett C. Peters, aims to celebrate individuals of vision and talent, whose leadership has made a lasting impact on our world. Past speakers include Sal Khan, Peter Diamandis, U.S. Senator Cory Booker, former U.S. Senator Bob Kerrey, Niall Ferguson, Eva Moskowitz, Deepak Srivastava, David Welch, and many others.

**"THE FIRST THING WE CAN DO TO
CREATE INTERNATIONAL SECURITY
IS TO LISTEN, TO UNDERSTAND THE
OTHER — THE OTHER NATIONS, THE
OTHER PERSON, THE OTHER ORGA-
NIZATIONS — TO BE OPEN TO OTHER
IDEAS. WHAT ELSE CAN WE DO? WE
CAN DO WHAT YOU ARE ALL ABOUT AT
PIONEER INSTITUTE: EDUCATION."**

JAMES STAVRIDIS,
*Retired Four-Star Admiral,
Dean of the School of Law &
Diplomacy at Tufts University*





The Peters *Legacy* Society

A Foundation Stone

AT THE PETERS LECTURE, PIONEER Executive Director Jim Stergios announced the establishment of a new program, **The Peters Legacy Society**, to recognize the enduring contributions of Lovett C. Peters and R. Kingman Webster, as well as the many individuals and families who have created a legacy at the Institute.

**[TO LEARN MORE,
VISIT PIONEERINSTITUTE.ORG/
GIVING-TO-PIONEER/](http://PIONEERINSTITUTE.ORG/GIVING-TO-PIONEER/)**

BOTH PETE AND KINGMAN supported Pioneer because they were deeply committed to our mission of promoting educational excellence and opportunity for all schoolchildren, regardless of family background or zip code. Through planned giving, you can help ensure that Pioneer Institute has the resources to continue advancing this important goal well into the future. Please consider joining the Peters and Webster families by including Pioneer in your estate plans.

Top Left: Alan & Cecily Morse Top Right: Stephen Fantone, Beth & Michael Davis, Jim Stergios Bottom Left: Bill Hoskins & Al Fortier Bottom Right: Roger Perry, Elizabeth & David Powell

Media & Quotes

GROWING & ENGAGING OUR NETWORK

PIONEER INSTITUTE IS WELL-POSITIONED TO TAKE advantage of the digital revolution in the delivery of content, continuing to serve as a trusted resource for traditional media outlets while growing our capacity to communicate directly with the public. Pioneer carefully manages and protects its reputation by fact-checking critics, and sharing our research, analysis, infographics, and videos with journalists, policymakers, and business leaders. Our social media strategy aims

to demonstrate our strong voice and impact by not only attracting more fans, but converting them into advocates for our cause. We reach fresh audiences and cultivate existing followers along a continuum of engagement from reading our content across multiple digital channels to attending our events, to sharing our work. In 2016, Pioneer significantly expanded our Twitter and Facebook following, and successfully deployed online advertising campaigns on topics ranging from charter schools and MBTA reform, to improving care for those with mental illness.



“IT’S LITERALLY THROWING MONEY DOWN THE DRAIN. T EMPLOYEES’ ABUSE OF OVERTIME RULES MEANS THAT WORKERS ARE GETTING PAID TO SLEEP. YOU’RE TALKING ABOUT \$1 MILLION COMPLETELY WASTED, DURING A MASSIVE BUDGET CRISIS AT THE MBTA WHERE TAXPAYERS ARE BEING ASKED TO GIVE \$1 BILLION TO BAIL OUT A SYSTEM THAT’S UNDERWATER.”

GREG SULLIVAN,
“5 Investigates: Cash-strapped MBTA paying drivers to stay home,”
 WCVB-TV

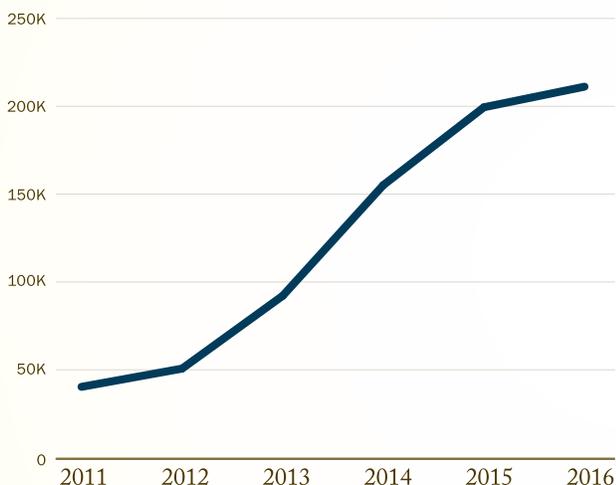
Traditional Media

Mentions	Op-eds
2,205	121

Social Media Impressions

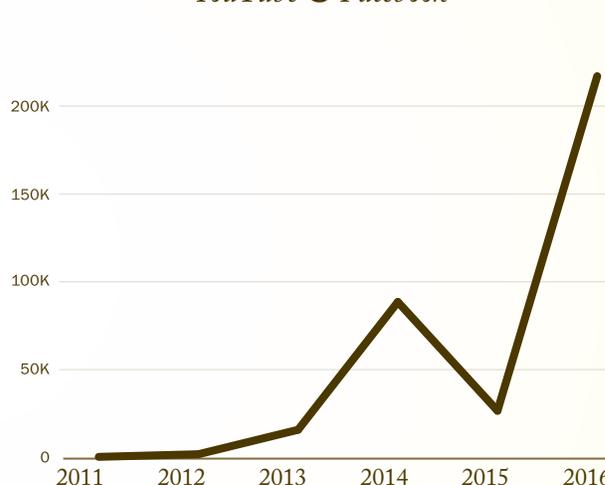
	Twitter
2.6M	
	Facebook
24.5M	

WEB TRAFFIC



VIDEO VIEWS

YouTube & Facebook





greater
BOSTON

“WE HAVE 100,000 KIDS WHO ARE IN FAILING SCHOOLS. WE NEED TO ADDRESS IT. ABOUT 34,000 ARE ON CHARTER SCHOOL WAITLISTS... STANFORD, MIT, HARVARD, DUKE, AND MANY OTHERS HAVE DONE STUDIES THAT HAVE SHOWN REPEATEDLY THAT BOSTON’S CHARTERS ARE AMONG THE BEST ACHIEVEMENT GAP-CLOSING SCHOOLS IN THE COUNTRY.”

JIM STERGIOS,
WGBH’s “Greater Boston”

“As a regular commuter rail user, it’s very frustrating that people are simply evading fares, or using their Smartphones to make it look like they’ve made a purchase. The conductors are too busy to notice, and the controls aren’t in place. But fare evasion is costing \$35 million a year on the commuter rail alone when you’re looking at a beleaguered MBTA with huge financial problems.”

Mary Connaughton,
WRKO

“Representatives of Boston-based Pioneer Institute have given us a perfect opportunity to wax patriotic: Adding an American history component to standardized testing in the Commonwealth will ultimately produce greater civic engagement, and a better United States... It’s not hard to see this the way Pioneer does.”

Editorial,
The New Bedford Standard Times

“This is the kind of problem you get when the government artificially limits the market and requires high fees — in this case, taxicab medallions — for someone to participate. What’s interesting is they are going to tax a new market participant to subsidize a competitor. That doesn’t happen very often.”

Jim Stergios,
The Boston Globe

“As of this March, the Massachusetts Health Connector served just 1,246 groups and 5,741 members. Some of the Connector board’s rhetoric has changed with new appointments by Gov. Charlie Baker, but much more work will be needed for the Connector to live up to the promise set out in the 2006 reform. In the meantime, small business will continue to face crushing premiums.”

Josh Archambault,
WBUR

“The state’s [past] success on NAEP, the nation’s report card, is really the equivalent of winning the World Series five times in a row and doing it four straight games each time. But then the international competition is like winning Olympic gold medals. It’s a remarkable accomplishment.”

Jamie Gass,
WBUR

“You can’t save and choose wisely in terms of price or quality of health-care if you don’t have the information. Without the information you’re in the dark, and that’s no way for a market to operate.”

Barbara Anthony,
The Washington Post

Share Our Research

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Get Involved

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“This is reality meeting rhetoric. We are now seeing that the rhetoric was misplaced or not fully informed that the Affordable Care Act would save money. We’re effectively buying every resident of Massachusetts a car every year. And the question for me is, do we feel like every resident in the state is getting a car’s worth of value from our medical system every single year?”

Josh Archambault

BOSTON
Herald

Donors



PIONEER INSTITUTE IS DEEPLY GRATEFUL FOR THE GENEROUS BOARD OF DIRECTORS, individuals, corporate partners, and foundations who support our work and mission. The following list recognizes those donors for their support to Pioneer Institute from October 1, 2015 – September 30, 2016.

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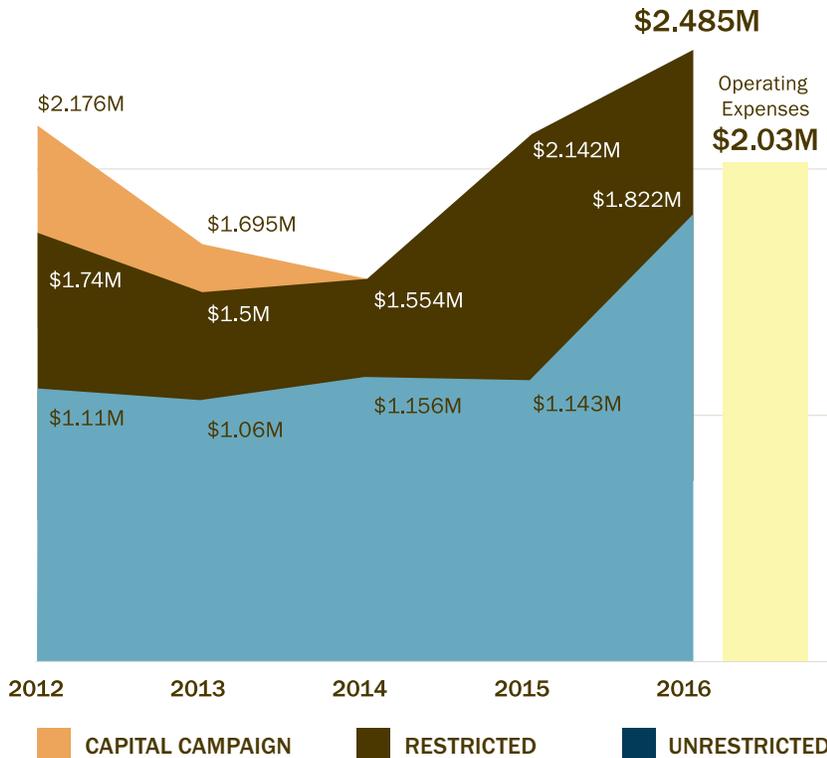


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Financials

REVENUE



REVENUES & EXPENSES

Revenue

Unrestricted Donations	\$1,771,127
In-Kind Donations	19,821
Restricted Donations	663,234
Other Revenue	31,260
Total Revenue	2,485,442

Expenses

Employment Costs	1,133,950
Outside Services	38,101
Research	319,018
Printing & Publishing	75,848
Distribution Costs	47,756
Events & Meetings	226,672
Staff Business Expenses	23,452
Office Operations	105,526
Internet/Website	8,674
Total Expenses	1,978,997

Other Income	132,236
Other Expenses	51,658
Total Expenses	1,978,997
Increase in Net Assets	\$587,023

FINANCIAL POSITION

Assets

Cash	\$593,417
Contributions Receivable	82,550
Investments	2,038,391
Property & Equipment	918,603
Other Assets	7,674
Total Assets	\$3,640,635

Liabilities & Net Assets

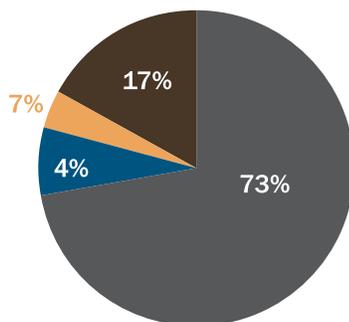
Accounts Payable & Other Accrued Expenses	\$51,531
Total Liabilities	51,531

Net Assets

Unrestricted Funds	2,648,786
Temporarily Restricted Funds	674,195
Permanently Restricted Funds	266,123
Total Net Assets	3,589,104

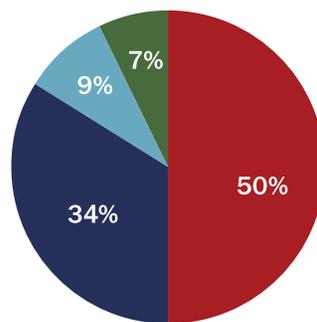
Total Liabilities & Net Assets	\$3,640,635
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EDUCATION



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.

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.

MEDIA



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.

LAW & 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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