

2017 Annual Report

# E PLURIBUS UNUM



PIONEER INSTITUTE  
PUBLIC POLICY RESEARCH



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# 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.*

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

## Pioneer Education

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

## Pioneer Health

Advances high-quality and cost-effective care through price transparency, reforms to public programs, and innovation in healthcare delivery and treatments.

## Pioneer Public

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

## Pioneer Opportunity

Advocates policies to expand opportunity across the Commonwealth, and reforms to transportation, housing, taxation, and regulation that will increase Greater Boston's competitiveness.



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## By The Numbers



34

### Publications

Research Papers,  
Policy Briefs,  
& Testimony



2,228  
Media Hits

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



120

### Attendees

Average Per  
Pioneer Event



43

### Events

featuring Pioneer



# Out of Many, One

**A**t the time of this writing, Pioneer is entering its 30<sup>th</sup> year of public service and there is disquiet at home. With disturbing frequency, the public square seems more playground for emotion-based vituperation than gymnasium where the musculature of democracy and the ideal of “out of many, one” get worked out.

The first use of the dictum, *E Pluribus Unum*, came in 1776 with drafts of the Great Seal of the United States, at right. It served as the foundation beneath symbols of Liberty and the Soldier, and of the original 13 colonies that were forming a single cohesive republic.



Political tumult today is a symptom of underlying societal shifts and technological changes in communications and industry, which together have the potential either to put the country’s future at risk or to create the premises for greater freedom and prosperity.

Not unlike the two sides of U.S. coins bearing the Great Seal, innovations in communications may offer: (heads) broader, more democratic enlightenment, or (tails) greater facility in manipulating public discourse and reducing culture to political and tribal conflict. The innovation economy may similarly increase opportunity and quality of life or, perhaps, act as an impediment to social mobility for the poorly educated.

## **Pioneer must be at the forefront of changes in communications and the economy.**

Heads or tails? Pioneer refuses to leave the Commonwealth’s fate to chance. Ensuring our future requires a strategy rooted in smart, intentional public policy and debate—not a random coin toss.

Significant investments in social media have made the Institute far more effective in fulfilling its important civic role. Our communications strategy is based on the Bloomberg business model: We aim to grow audiences organically based on their interests. Daily, we reach tens of thousands of individuals interested in our core practice areas—education, health, government, and economics.

In 2018, Pioneer will continue to develop local, state, and national products that expand and engage our many audiences, particularly younger constituents who want to make a difference.

Our accomplishments are predicated on professional communication of high-quality research on issues that will support a virtuous and ever expanding circle of freedom and prosperity in the Commonwealth.

Today’s red-hot economies in both Massachusetts and the U.S. reward the educated and consign families with poor educational options to seeing the American Dream deferred for another generation. Under the status quo, the tensions and problems that arise from rapid growth, such as a troubled transportation system and home prices beyond the reach of many families, cannot be resolved. That’s where Pioneer comes in.

## **We aim to create a better future, not by chance, but by keeping the spirit of our forebears’ vision alive.**

Economics and public policy are not zero-sum games, nor are they games of chance. Pioneer Institute aims to continue to shape our future in the image of our founders’ vision, but also to improve it by expanding opportunity to all who today call the Commonwealth of Massachusetts home.

We are grateful for your trust and friendship, your ideas, your support, and your commitment to a freer and more prosperous Massachusetts.



**Jim Stergios**  
*Executive Director*



**Stephen D. Fantone**  
*Chairman*





PioneerEducation

## Regaining Momentum on Education Reform:

*High Standards, Accountability & Choice*

*One of the greatest challenges facing the Massachusetts K–12 education system is self-satisfaction. Too many believe that the hard work of reform is over. Massachusetts is the number one performing state on the National Assessment of Educational Progress (NAEP), and while Pioneer is proud of the progress made, we are clear-sighted about the further advances needed.*



In this c. 1797 coin, an eagle holds the Union shield, 13 arrows for military strength, an olive branch of peace, and a scroll inscribed *E Pluribus Unum*, similar to the Great Seal.

Unfortunately, over the last decade, that self-satisfaction has allowed opposition to standards-based education and even to the statutorily required U.S. history MCAS test to grow. It has also allowed for the dismantling of school district accountability and the obstruction of charter and other successful public school models.

Massachusetts' adoption of Common Core standards in 2010 has resulted in backsliding in English and math. The state has, in fact, experienced troubling declines in its NAEP performance since 2011. Moreover, Massachusetts no longer leads the nation in one of the test's four important categories, eighth-grade reading, as reflected in the charts on the next page.

With a rudderless state Department of Elementary and Secondary Education (DESE) and a militant Massachusetts Teachers Association, even the most retrograde proposals, such as a potential end to MCAS testing, are getting a hearing on Beacon Hill.

Massachusetts' past progress in K–12 education was rooted in leadership and good ideas, including rigorous curriculum frameworks and assessments, abundant school choices, and adequate funding. In 2017, Pioneer's academic-quality reports and professional marketing resulted in additional funding for the expansion of vocational education; renewed efforts to reinstate a U.S. history graduation requirement; increased applications for Boston charter schools; and solidified opposition to Common Core national education standards across the country.

### *A Content-Rich Education Safeguarding High Academic Standards*

As a result of Pioneer's work to roll back Common Core, states across America have withdrawn from Common Core-aligned testing consortia that would have committed school districts to implementing these low-quality standards. At the federal level, Robert Eitel, co-author of a widely circulated Pioneer Institute report questioning Common Core's legality, is conducting a regulatory review to protect state and local control over curriculum and instruction. In Massachusetts, DESE has been undertaking a review of all of its K–12 curriculum standards, with largely unimpressive results.



**“Over the last 10 years, Massachusetts has been No. 1 on the Nation’s Report Card for math and science. Recently, the state Department of Education has dumbed down our standards. For a state heavily dependent on hospitals, colleges, and biotechnology, our K–12 science standards matter.”**

**– Jamie Gass, *Boston Herald***

Additionally, Pioneer provided expert input on the state’s draft science standards. Our two-part analysis of the so-called Next Generation Science Standards adopted by the state Board of Elementary and Secondary Education found that the new standards were a significant step backward, focusing more on skills than content and excluding even basic concepts such as Mendelian genetics, cell biology, chemistry, thermodynamics, minerals, and rocks. The analyses—authored by California State University Northridge Biology Professor Dr. Stan Metzenberg; Paul Gross, Professor *Emeritus* of Life Sciences, University of Virginia; and Ze’ev Wurman, California education standards expert and advisor on the Golden State’s mathematics assessments—were covered in the *Boston Herald* and the *Boston Business Journal*.

### ***Reclaiming K–12 History & Civics Instruction***

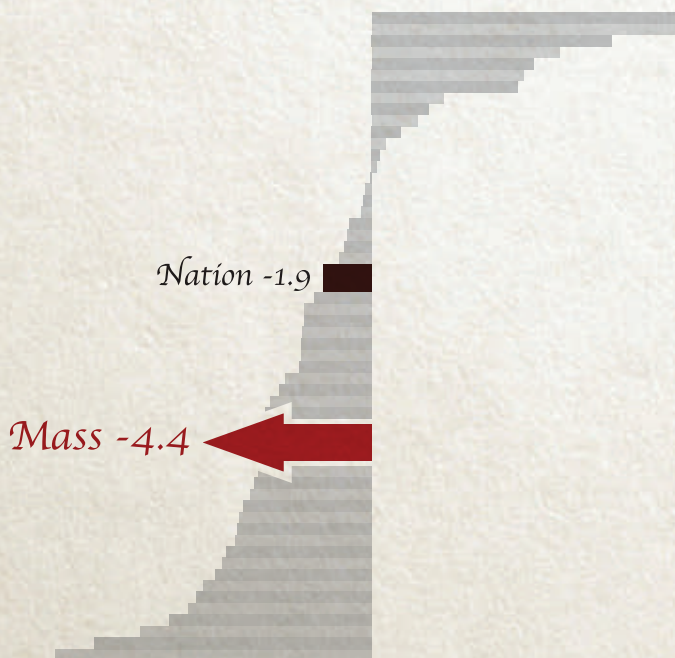
Education practitioners know this simple truth: what isn’t tested isn’t taught. For too long, K–12 history and civics instruction has been marginalized to make room for more ELA and math courses. As a result, future generations are growing up without the skills and knowledge they need to fulfill the duties of citizenship in our democracy. Pioneer’s initiative to reinstate passage of a U.S. history test as a graduation requirement aims to reverse this troubling trend by holding school districts accountable for student progress in this subject.

Pioneer’s 2016–17 agenda to promote U.S. history and civics included organizing two high-profile public forums, publishing research, placing op-eds, attending editorial board meetings, and participating in a working group with state policymakers and non-profit leaders.

A Pioneer report, *Laboratories of Democracy: How States Get Excellent K–12 U.S. History Standards*, highlighted best practices for establishing and updating K–12 history standards, based on the experiences of six states. The study included a preface by Pulitzer Prize-winning historian Daniel Walker Howe.

In addition, Jamie Gass and Pioneer Senior Education Fellow Tom Birmingham met with editorial boards around the state, resulting in calls for the reinstatement of a U.S. history MCAS graduation requirement. High-quality history standards and a test had been developed and were ready to

***Aggregated Change on NAEP Math Scaled Scores, 4<sup>th</sup> and 8<sup>th</sup> Grades 2011–2015***



***Aggregated Change on NAEP Reading Scaled Scores, 4<sup>th</sup> and 8<sup>th</sup> Grades 2011–2015***





be implemented in Massachusetts when the administration of former Governor Deval Patrick discarded the requirement in 2009, citing the \$2.4 million cost.

Gass also wrote op-eds on the 70<sup>th</sup> anniversary of the Nuremberg trials, the slave trade (published during Black History Month), the Roman statesman Cicero, and the 70<sup>th</sup> anniversary of the Marshall Plan, that appeared in *The Federalist*, *WGBH News*, and media outlets across Massachusetts.

In addition to events, research, and media campaigns, Pioneer has worked with the John F. Kennedy Library to convene civic organizations and education leaders to reverse this policy.

### *Abundant Options for Parents*

All parents want the most effective form of academic instruction for their child's unique learning styles, strengths, and needs, whether that means private and parochial options, vocational-technical education, homeschooling, or a program such as METCO, that allows urban children to enroll in suburban districts. Pioneer research demonstrates that many of these options help students thrive in terms of academic performance, closing achievement gaps, graduation rates, college attendance, and career preparation.

### *Fulfilling the Promise: METCO*

Pioneer's Jim Stergios and Cheryl Brown Henderson, whose father, the Rev. Oliver L. Brown, was a lead plaintiff in *Brown v. Board of Education*, co-authored a *Boston Globe* op-ed on the 50<sup>th</sup> anniversary of METCO's founding, bringing needed attention to the successful program, which gives 3,300 Boston and Springfield students the chance to attend high-performing suburban schools. Findings from two Pioneer Institute studies on METCO were also cited in *The 74 Million* and a *Boston Globe* editorial.

More than three-quarters of METCO participants are African-American or Latino, and they dramatically outperform their Boston and Springfield Public Schools counterparts on state tests, graduation rates, college attendance, and college success. Despite its benefits, METCO's per-pupil funding dropped by more than 18 percent between 2007 and 2014. Pioneer called for the state to commission a study comparing the performance of METCO students to their waitlisted peers, and to reform the program to improve transparency and accountability.

### *Beyond the Traditional Classroom: Homeschooling*

Another viable alternative to traditional public education that is growing in popularity is homeschooling. A Pioneer report found that nearly two million American K-12 students were homeschooled in 2012, compared to just 10,000 families in 1980. These students are reducing public education costs nationwide by approximately \$22 billion per year. The authors urged states to provide more direction and information for

## 2017 Impact

### *Our Successes Include:*

- An additional investment of \$50 million in vocational-technical school facilities.
- Full revamping of K-12 academic standards by the Massachusetts Department of Elementary and Secondary Education.
- Doubling of the number of student applications for Boston charter schools.
- Convened Kennedy Library and other civic organizations to support high-quality K-12 U.S. history standards, instruction, and tests.
- New evaluation process established for all capital projects at public colleges and universities.
- PioneerLegal produced an amicus brief in support of the plaintiffs in a Massachusetts Supreme Judicial Court case that could lead to a cap lift on charter public schools.

**“The Brown decision was designed to offer excellence to students of color and those with special needs — not to educate for mediocrity. More than 60 years later, we believe the justices who signed on to the unanimous opinion in *Brown v. Board of Education* would approve of Metco, which is allowing those less privileged and students of color to exercise their right to equal education.”**

**– Cheryl Brown Henderson  
& Jim Stergios, *The Boston Globe***



## Pioneer Public Forums in U.S. History

“The War to End All Wars: Teaching the First World War in Schools,” was held as part of the 47<sup>th</sup> Northeast Regional Conference on the Social Studies at the Edward M. Kennedy Institute for the U.S. Senate in Boston. Speakers included David Kennedy, Professor *Emeritus* at Stanford University, and Pulitzer Prize-winning author of books on World War I; John Milton Cooper, Jr., Professor *Emeritus* at the University of Wisconsin-Madison, and Woodrow Wilson biographer; Michael Neiberg, Chair of War Studies at the United States War College; and Andrew Carroll, Founder and Director of the Center for American War Letters at Chapman University, and John J. Pershing biographer. White House Historical Association Chief Historian Edward Lengel, and two Massachusetts public school history teachers served as additional panelists. This forum earned coverage in *The Boston Globe*.

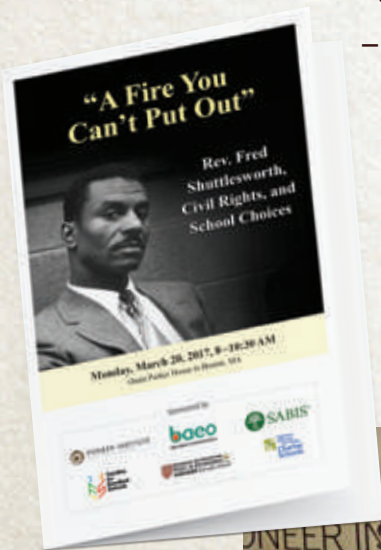


David Kennedy speaks at “The War to End All Wars: Teaching the First World War in Schools”

**“The Pioneer Institute has been on a mission to return the study of history to its proper academic place. This concerted campaign seeks to make knowledge of history a high-school graduation requirement, and eventually elevate U.S. history to a MCAS-level test.”**

– Editorial, *The Lowell Sun*

Another Pioneer forum, “A Fire You Can’t Put Out: Rev. Fred Shuttlesworth, Civil Rights, and School Choices,” explored the turbulent life and times of one of the Civil Rights movement’s most influential figures, with insights into his character from Rev. Shuttlesworth’s widow Sephira, his biographer Andrew Manis, and Diane McWhorter, author of a Pulitzer Prize-winning history of the Civil Rights era. Their discussion was followed by a policy panel on current barriers to educational equality moderated by the Rev. Liz Walker, pastor of the Roxbury Presbyterian Church, and former *WBZ-TV* news anchor.



Sephira Shuttlesworth speaks at “A Fire You Can’t Put Out: Rev. Fred Shuttlesworth, Civil Rights, and School Choices.”



Pulitzer Prize winner Diane McWhorter speaks at “A Fire You Can’t Put Out: Rev. Fred Shuttlesworth, Civil Rights, and School Choices.”



Kelley Brown, 2010 Massachusetts History Teacher of the Year speaking at “The War to End All Wars: Teaching the First World War in Schools.”



parents seeking non-traditional schooling. The report received coverage in *The Hechinger Report*, *Townhall.com*, and other online news outlets. A report co-author discussed the findings on *WBZ* radio and was invited to speak at national conferences.

*Investing in Success: Vocational Education*

Pioneer research has shown that vocational-technical schools in Massachusetts educate a higher percentage of low-income and special education students than traditional high schools do, but with a far lower dropout rate and a much higher special education graduation rate. More than two-thirds of voc-tech graduates pursue post-secondary education. At least 4,400 students are on waitlists to attend these successful models, clear evidence of the need for expansion. Pioneer Senior Fellow Tom Birmingham participates in a statewide task force on vocational-technical education, and his opinion pieces supporting voc-tech expansion have appeared in *Commonwealth* magazine, and regional outlets. Fortunately, Massachusetts Governor

Charlie Baker has heard the message. His administration has committed an additional \$50 million in state grants to expand facilities and enroll more students at these remarkable models.

*Restoring Faith in Catholic Education*

Pioneer is committed to helping ensure that families of faith have the option to access religious instruction for their children regardless of their socioeconomic status. The Institute has worked tirelessly to bring attention to the many benefits of a religious education, and raise awareness of the growing challenges that these schools face.

Across the country, Catholic schools are seeing declining enrollment. Over 5 million Americans attended Catholic schools in 1965; that number dropped to just 2 million in 2008. Boston alone was home to 225 parish, grammar, and high schools in 1942; that number dropped to just 124 today. Last year, Boston saw the closure of its only Catholic high school for girls, while the only Catholic high school in all of Berkshire County was set to shut its doors for good at

*Big Sacrifices, Big Dreams:  
Ending America's Bigoted Education Laws*

**B**ig Sacrifices, Big Dreams: *Ending America's Bigoted Education Laws* is a documentary film tracing the history of persecution and violence directed at Catholics during the 1840s and 1850s. This movement generated legislative and constitutional changes that severely limit parental choice in education even to this day. In Massachusetts, the "Anti-Aid" amendments prevent more than 100,000 urban families with children in chronically underperforming districts from receiving tuition assistance that would enable them to access private and parochial educational options. Sadly, these barriers affect 37 other states. This film blends Ken Burns-style historical narrative with real-life testimonials from struggling families across the country, from Georgia and Michigan, to Massachusetts. It was released during National School Choice Week 2018 and has already received over one million views.

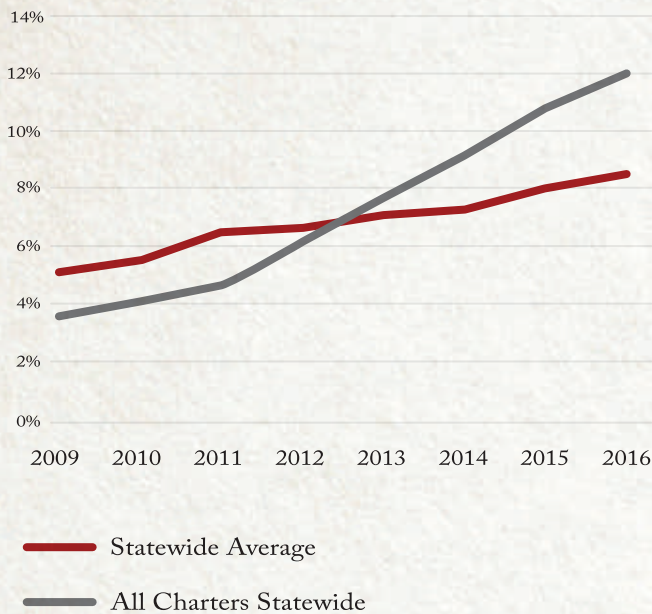


*To learn more about this project and help ensure that this film receives a wide audience, please make your gift today by visiting: [www.pioneerinstitute.org/bigdreamsfilm](http://www.pioneerinstitute.org/bigdreamsfilm).*

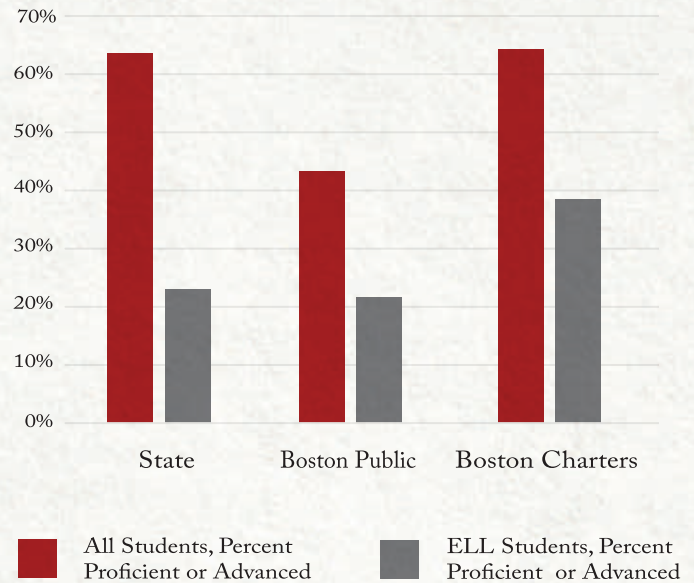


## ELL Student Enrollment and Performance Higher at Charter Than District Schools

*ELL Enrollment Percent, Statewide*



*2014 MCAS, Percent Proficient and Advanced*



the end of the academic year. In the most Catholic state in America, Catholic education is facing an existential crisis.

In research, op-eds, a widely attended public forum, and a feature-length documentary film, Pioneer highlighted the benefits of religious education. In *The Healing Hand: Modeling Catholic Medical Vocational-Technical Schooling*, Pioneer explored medical vocational-technical education as a means of helping area Catholic schools address declining enrollment, and providing economically disadvantaged students with the skills employers are seeking.

Pioneer published op-eds in *The Pilot*, the *Boston Herald*, *The Providence Journal*, *The New Hampshire Union Leader*, and other regional outlets, urging political leaders to provide access to higher quality educational options for poor and working-class Bay State families. During National School Choice Week, Jamie Gass discussed the bigoted origins and anti-school choice legacy of the Know-Nothing movement at a conference held by the Illinois-based Heartland Institute.

Pioneer held a forum, “The Life You Save: Catholic Schooling & the Liberal Arts in the 21<sup>st</sup> Century” with Father George Rutler, an internationally-recognized pastor, author, and *EWTN* television program host; Anthony Esolen, poet, professor, and translator of Dante’s *Divine Comedy*; Paul Elie, author and Georgetown University scholar; Harvard University law professor Mary Ann Glendon, a former U.S. Ambassador to the Holy See; and

many more. Pioneer also released a groundbreaking study, *After the Fall: Catholic Education Beyond the Common Core* that found Catholic schools’ academic, spiritual, and moral mission incompatible with the workforce-preparation focus of the controversial national standards. The report earned coverage in *The National Catholic Register*, *Politico*, and other publications.

### *Demonstrating Charter Schools’ Success Serving All Students*

Massachusetts is home to the nation’s top-performing charter public schools, which have a proven record of achievement. Despite successful outcomes, voters last year rejected a statewide ballot initiative that would have expanded enrollment at these schools. Today, most urban areas in the Commonwealth are at or near the statutory cap on charter enrollment.

During and since the contentious ballot campaign, critics have spread a false narrative that charter schools don’t serve all students; that, instead, they pick and choose the top performers, don’t accept children with special needs, and “counsel out” students who are difficult to educate.

In a series of reports on best practices in these schools, Pioneer led the charge to educate the public, using data to expose these lies. Charters have changed their enrollment practices in response to a 2010 state law that required districts to share mailing lists with charters. Since then, spe-



cial needs students' enrollment and performance in charter schools have increased markedly.

A Pioneer study demonstrated that Massachusetts charter public schools are enrolling more English Language Learners (ELLs) in recent years, and that those students report lower rates of attrition (student loss from one year to the next) and more successful academic outcomes than their district counterparts. The report also found that the rate of Boston charter students transitioning out of ELL status after one year is three times the rate at the Boston Public Schools (BPS). If the current enrollment pattern continues, Boston charters are on track to serve the same percentage of ELLs as the BPS.

Additional Pioneer research revealed that Boston charter students are more likely than their BPS counterparts in non-exam schools to take Advanced Placement (AP) courses and tests, and Boston charters have also had more success at improving passing rates for traditionally underserved students.

Debunking the myth that charter students' success compared to their district counterparts stems from 'pushing out' lower performing students, Pioneer published analysis showing that Massachusetts charters have lower attrition rates than the district schools from which their students come. The report also indicated that charter school attrition is declining and approaching the state-wide average, and Boston charters have a lower overall weighted attrition rate than the BPS. The same study concluded that Boston charters have a lower dropout rate and higher graduation rate compared to the BPS.

But by far the most damaging misconception perpetuated about charter schools is the notion that they "drain resources" from traditional districts. The truth, as reaffirmed in a Pioneer report, is that sending districts receive the most generous reimbursement formula in the country for every child lost to a charter. Moreover, half of all Massachusetts charter school students come from low-income communities whose districts receive most of their education funding directly from the state.

In additional research, Pioneer recommended lifting the charter school enrollment cap, strengthening teacher and school leader pipelines, and revising facilities funding so that Massachusetts can bring its successful charter sector to scale. This series received coverage in the *Boston Herald*, and informed the public debate during the contentious 2016 ballot campaign. Pioneer op-eds in support of expanding charter school enrollment appeared in *The Boston Globe*, *The 74 million*, *WGBH News*, *Worcester Telegram & Gazette*, *CommonWealth* magazine, and other regional news outlets. Pioneer senior staff also promoted charter schools on *NECN*, *WGBH*, *WBUR*, and other television and radio

outlets. After Pioneer's yearlong multimedia effort to support expanded access to charter schools, the number of student applications for Boston charters doubled, evidence of increasing demand for this successful model.

### *Preventing Summer Learning Loss*

The U.S. Department of Education has called summer learning loss "devastating," especially for students from low-income backgrounds, who are disproportionately impacted. One approach to combatting it is through summer enrichment programs. Pioneer completed a three-part series on the variety of such programs throughout the U.S., and recommended expanding their duration. The first study in the series described the alarming impact of summer learning loss, and presented the most common courses available and grade levels served at the Massachusetts private and parochial schools that offered academically-oriented summer programs. Subsequent reports highlighted the best practices of secondary schools across the country that offer summer enrichment courses; introduced three types of extended summer learning; and encouraged private schools to increase support for greater numbers of low-income and minority students in their community.

Along with the series, Pioneer published an opinion piece on the importance of encouraging children to read great literature during the summer months that appeared in *WGBH News*, *The Federalist*, and news outlets throughout Massachusetts.



**“ Boston Public Schools and Boston charter schools will serve the same percentage of English Language Learners. ELL students who enroll and stay in charter schools make really great gains — they receive an additional year of learning compared to their BPS peers.”**

– Pioneer Senior Education Fellow  
Cara Candal on *BNN News*





PioneerHealth

## Removing Barriers to Higher Value & Innovation in Healthcare

Pioneer Institute<sup>1</sup> healthcare initiatives generally focus on promoting free market principles, such as price transparency and expanded high-value care options to contain costs and increase access to care; reforming state programs such as MassHealth and the Connector to improve their sustainability and quality; and advocating for a dynamic marketplace for innovation in the delivery of services and development of new treatments.



This \$20 coin was minted from 1849–66, coinciding with a burgeoning nation swept up in the Gold Rush and then torn apart by Civil War. Beneath a 13-star halo and an arc of rays, an eagle protects a shield symbolizing the nation, and holds a double banner displaying *E Pluribus Unum*.

### *Taking the Pulse of Price Transparency: Hospitals & Pharmacies*

Americans are not accustomed to thinking about the cost of their care and therefore do not shop around for healthcare services. Healthcare price transparency is a PioneerHealth priority because secrecy and lack of cost information impede natural market forces, obstructing consumers' ability to make wise decisions about their medical treatment. In Massachusetts, where healthcare prices between providers vary greatly and cannot be explained by quality, acuity, or other factors, PioneerHealth believes there must be relentless efforts among insurers, providers, and state leadership to make healthcare more transparent.

Though only a small percentage of Massachusetts residents are uninsured, many are underinsured and coverage for prescription drugs fluctuates dramatically. Many patients pay out-of-pocket for at least part of their prescription medication. Building on Pioneer's previous series of reports exposing the opaqueness of prices for routine procedures at hospitals and specialized practices in Massachusetts and across the country, Pioneer Senior Fellow in Healthcare Barbara Anthony undertook a survey of pharmacies in the Bay State. In the resulting report, *Transparency in Retail Drug Prices: Easy to Obtain but Accuracy May Be Doubtful*, she presented findings from 44 independent and chain drugstores across Massachusetts showing wide variation in prescription drug prices. The study reached surprising conclusions about cost differences at chains and independent stores, especially regarding generic brands, and offered several recommendations for store owners and consumers. Additionally, Anthony's research questioned the role of pharmacy benefit management companies and the distribution of manufacturers' discounts.

Anthony shared the findings in an interview on "Full Measure," a nationally syndicated news program hosted by Sharyl Attkisson. For the segment, which aired in near-



ly 100 media markets across the U.S., Anthony arranged an interview with the owner of Skenderian Apothecary, a Cambridge-based independent pharmacy. The report also received coverage in *State House News Service*, *MassLive*, *The Lowell Sun*, and the *Fitchburg Sentinel & Enterprise*.

Another survey, *Massachusetts Hospitals Score Poorly on Price Transparency... Again*, provided an update of a 2015 report that found limited pricing availability at area hospitals despite a state transparency law passed in 2012. The new study revealed price variations of up to 1,000 percent for a routine procedure at 21 Massachusetts medical facilities. It received coverage in *The Boston Globe*, the *Boston Herald*, the *Springfield Republican*, *Becker's Healthcare*, *State House News Service*, *Healthcare Finance*, and *The Lowell Sun*.

Pioneer provided testimony to the Legislature's Special Commission on Price Variation that recommended a host of policy reforms, a number of which were included in the final legislative report. Among other suggestions, Pioneer urged enhanced enforcement of and industry compliance with existing state transparency laws, and a statewide education campaign to help consumers make value-conscious decisions. In testimony before the Massachusetts Health Policy Commission's Cost Trends Hearing, an annual conference of industry representatives and policymakers, Anthony brought the Commission's focus back to consumers and registered disappointment with the inadequate implementation of the state's 2012 healthcare price transparency legislation. In a *Boston Herald* op-ed, Lovett C. Peters scholar Scott Haller urged the state Attorney General and the insurance commissioner to enforce the law's requirement that health insurers provide timely pricing information. Further, in a public statement, Pioneer called on the Massachusetts Governor and Attorney General to exercise greater leadership on this issue.

### *Overcoming State Licensing Barriers: Greater Access to Dental Care*

Half a million Bay State residents live in dental shortage areas and nearly half of all children enrolled in MassHealth went without oral care in 2015. Strict licensing regulations have blocked entry to the dental market for new types of dental providers and have therefore limited access, especially for lower income patients. During state legislative deliberations on a healthcare reform bill, Pioneer submitted testimony in support of expanding scope-of-practice laws to allow dental therapists to perform at the top of their training. This new category of provider would be able to perform procedures such as fillings and X-rays, increasing basic care access and reducing costs for patients. At least six states have authorized dental therapists to practice in some form, with over a dozen others considering it. This provision was included in final legislation passed by the Massachusetts Senate.

### *Improving Access and Patient Outcomes: Telemedicine and MinuteClinics*

After Pioneer published a study showing that Massachusetts' embrace of telemedicine would reduce healthcare costs, shorten treatment times, increase patient satisfaction, and provide added convenience for both patients and physicians, the Massachusetts State Senate included telemedicine reforms in a healthcare bill that it passed. The Pioneer study, by Scott Haller, highlighted features such as live interactive appointments and remote patient monitoring, which could be especially beneficial for patients in rural areas, nursing homes, and correctional facilities. Nationally, embracing telemedicine could save over \$1.5 billion per year.

The report urged the Commonwealth of Massachusetts, the Group Insurance Commission (GIC), which is the Commonwealth's public employee health insurance administrator, and MassHealth and other state-run programs to adopt telemedicine and allow patients to participate in appointments from home. Massachusetts is one of only two states that don't mandate telemedicine coverage for Medicaid (MassHealth) recipients and does not have a law related to reimbursement. The report made a number of recommendations on methods to increase utilization of telemedicine and received coverage in the online journal, *Patient Daily*. Haller's op-ed on the study's findings appeared on *WBUR's* online healthcare blog, *CommonHealth*.

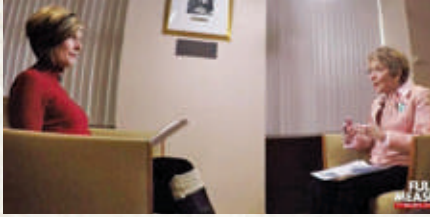
Another method of increasing access to medical services is through limited service clinics, such as the CVS-branded MinuteClinics. These clinics are critical in the city of Boston, especially given that the average wait time for a new patient to see a family physician there is 109 days. There are over 1,100 such clinics nationwide, and while Massachusetts is home to 56 of them, there is not one single limited service clinic of any type in the entire city of Boston. In a *Boston Herald* op-ed, Barbara Anthony described city and provider opposition to such clinics and pointed out that they would be particularly effective in many Boston neighborhoods with significant low-income, minority, elderly, and student populations. Anthony reiterated Pioneer's call for the city of Boston to be receptive to these innovations in healthcare delivery.

### *Fixing a Broken System*

The Commonwealth's annual MassHealth (Medicaid) budget is more than \$15 billion, or 40 percent of the total state budget. Nearly 2 million people are currently enrolled, an increase of 500,000 since 2013. The 7 percent increase in enrollment in the publicly subsidized plan matches the decline of those insured through commercial coverage. Undeniably, MassHealth presents major budgetary challenges for the Commonwealth.



# PioneerHealth In the News



*Pioneer Senior Fellow Barbara Anthony discussed Pioneer's drug cost survey on "Full Measure," a nationally syndicated program hosted by Sharyl Attkisson.*



*Pioneer Senior Fellows Barbara Anthony and Josh Archambault debated the likely impact of changes to the Affordable Care Act, on NECN's "The Take with Sue O'Connell."*

But to address this crisis, the Baker Administration introduced a proposal in its fiscal 2018 budget that would have adversely and unfairly impacted the small business community: an annual \$2,000 penalty per employee on companies that fail to insure a minimum of 80 percent of employees. Another proposal would have imposed price caps on insurance companies' payments to providers. After Pioneer and several groups brought much-needed public scrutiny to these misguided plans, the administration dropped both proposals.

Once the Legislature received the Governor's revised reform package, it accepted the business tax proposals that were included while discarding important reforms such as a moratorium on mandated benefits, a requirement that prices for common procedures be made publicly available, and the transfer of 140,000 lower-income, non-disabled adults from MassHealth to the state's Connector exchange. In a *CommonWealth* magazine op-ed, Pioneer's Jim Stergios and Barbara Anthony applauded the Governor's updated proposal as a good start, and urged the Legislature to work with the executive branch and stakeholders to frame creative and bold solutions for Massachusetts. The op-ed reminded readers that in the past, Massachusetts has risen to such challenges and an encore is required, especially given recent uncertainties regarding federal funding of healthcare.

Pioneer also gave credit where it was due, publishing a *Boston Herald* op-ed praising the GIC, which is responsible for insuring over 400,000 state employees and their family members, for its leadership in healthcare cost containment. The GIC has offered tiered provider plans and recently launched a cash-incentive program called Vitals SmartShopper, designed to reward patients directly for picking high-value providers that save money.

In the face of provider claims that the GIC acted unlawfully, Pioneer was an early, clear voice defending the GIC's vote to set benchmark reference prices for providers as a wise use of a single insurer's market clout to reduce unwarranted price variation within its network and achieve better value.

In addition, Pioneer released a policy brief commending the Commonwealth's Health Policy Commission's decision to reduce the state's benchmark growth rate for healthcare spending in an effort to contain costs. The brief also encouraged state policy makers to remain focused on the large shifts in culture needed to rein in healthcare costs.

## *Debating the Future of the Affordable Care Act*

Nationally, consumers faced increased health insurance premiums and fewer choices for buying insurance. Locally, on average, enrollees on the state's Connector exchange saw their premiums increase 22 percent and residents buying insurance on the individual market paid higher prices for fewer options.

The status of the Affordable Care Act (ACA) was a prominent subject of national debate in 2017. The uncertainty of reform and its impact on Massachusetts' budget and healthcare services led Pioneer to publish *U-Turn: America's Return to State Healthcare Solutions*, an updated version of its 2012 book offering state-based solutions to healthcare policy challenges.

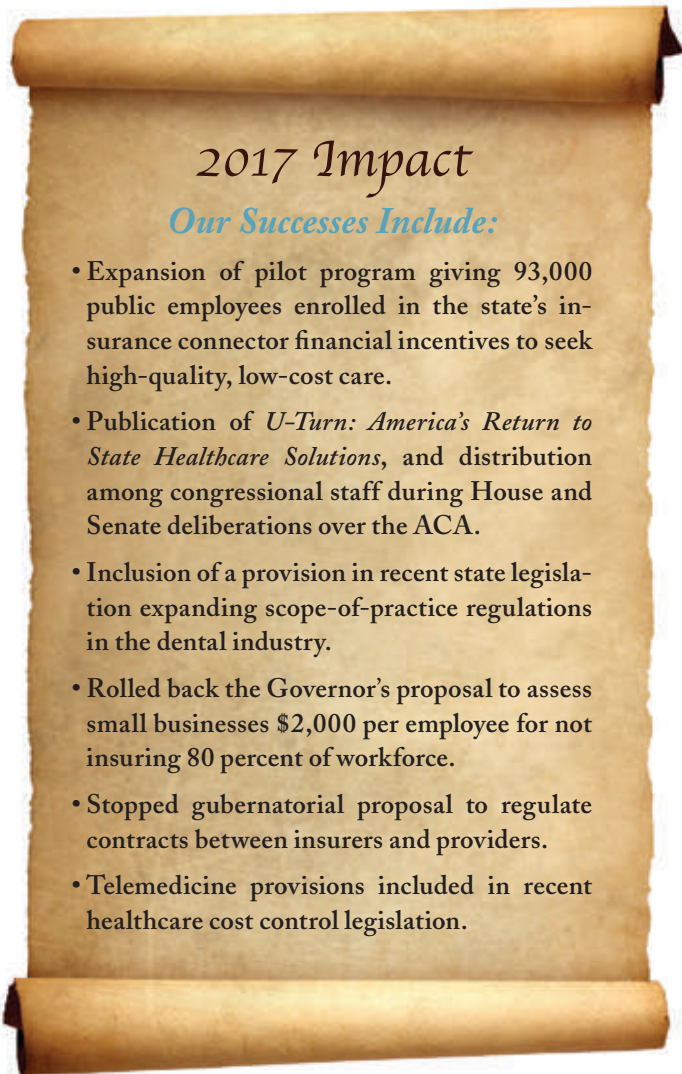
Pioneer also released dueling policy briefs from Pioneer Senior Fellows Josh Archambault and Barbara Anthony on how Massachusetts should move forward if Congress repealed the federal healthcare law. In *What Massachusetts Should Do in an Uncertain Healthcare World*, Archambault



suggested the Commonwealth focus on providing access to care rather than just insurance coverage, and look to other states' successful reforms. His report recommended changing insurance regulations that govern medical providers, pursuing invisible risk-sharing to help those with pre-existing conditions, revisiting the Health Connector, and enhancing transparency by giving incentives to patients who choose high-value providers. This last recommendation was included in a Senate health reform bill passed in 2017.

In her counter-point, *What Massachusetts Should Do as Uncertainty Engulfs the U.S. Healthcare System*, Anthony defended the Commonwealth's individual mandate and laws guaranteeing that no one is denied insurance due to pre-existing conditions. Her recommendations include increasing individual penalties for failure to purchase affordable insurance, government leadership to bring prices of entities with entrenched market power more in line with what a competitive market might produce, an assessment on employers whose low-wage employees have swelled the Medicaid programs, more open disclosure from MassHealth about cost savings resulting from utilization of managed care insurance companies, and more vigorous state Division of Insurance review of carrier rate requests.

The authors exchanged views on *NECN's* "The Take," and op-eds drawn from the reports' findings appeared in *The Salem News*, *The Lowell Sun*, *Taunton Daily Gazette*, and the *Fitchburg Sentinel & Enterprise*. During congressional deliberations over the future of the ACA, Josh Archambault appeared on *WBZ Nightside* with Dan Rea, *WGBH* Greater Boston, and *WBUR*.



## U-TURN: *America's Return to State Healthcare Solutions*



**W**ith the ongoing political drama over efforts to repeal and replace the Affordable Care Act (ACA), it's nearly impossible for average Americans to keep track of policy changes and shifts in coverage and costs. What direction will healthcare take under a divided Congress and a volatile Trump administration? PioneerHealth's new book explores the hard questions:

- How can we meet key challenges: lowering the runaway cost of care, maintaining access to high-quality medical services for all residents, and ensuring coverage for those with pre-existing conditions?
- What steps can the U.S. pursue to finally grapple with exploding Medicaid and Medicare costs?



# Hewitt Healthcare Lecture

## □Evolving Healthcare Delivery Models□

**P**ioneer Institute's 11<sup>th</sup> annual Hewitt Healthcare Lecture, held on May 3, 2017, highlighted innovations in the Massachusetts healthcare market to meet consumer demand, improve patient outcomes, and reduce costs.

Former Beth Israel Deaconess Medical Center President and CEO Paul F. Levy moderated a panel discussion featuring medical practitioners, executives, and entrepreneurs. Panelists included Dr. Tobias Barker, Chief Medical Officer of CVS MinuteClinic; Fay Donohue, Advanced Leadership Initiative fellow at Harvard University and former CEO of Dentaquest and Delta Dental; Dr. Rushika Fernandopulle, CEO of Iora Health; and Rob Graybill, vice president with Vitals, a leader in healthcare transparency.



**“In every other part of the economy we allow some version of market mechanism to set prices. Bureaucrats sitting in a room setting prices doesn’t work. Having a competitive dynamic to figure out the price that clears the market actually works but requires informed consumers. You have to weigh not just price, but value. Right now the people making all the decisions have a vested interest in taking money from you, not working for you. We need more transparency and information.”**  
– Dr. Rushika Fernandopulle



*Rob Graybill, Dr. Rushika Fernandopulle, Fay Donohue, Dr. Tobias Barker, and Paul Levy*

The annual Hewitt Healthcare Lecture is dedicated to the memory of former Pioneer chairman Colby Hewitt. Past speakers have included Marylou Sudders, Secretary of the Massachusetts Executive Office of Health and Human Services; Don Berwick, former Administrator of the Centers for Medicare and Medicaid Services; Robert S. Kaplan, *Emeritus* Professor of Leadership Development at the Harvard Business School; David Cutler, Harvard economist; Avik Roy, Manhattan Institute Senior Fellow; Uwe Reinhardt, Professor of Economics at Princeton University; Tom Miller, Fellow at the American Enterprise Institute; and many more.

*To learn more about corporate and individual sponsorship opportunities for our upcoming Hewitt Healthcare Lecture, please contact Brian Patterson, Director, Annual Fund at [bpatterson@pioneerinstitute.org](mailto:bpatterson@pioneerinstitute.org).*



*Mary Connaughton,  
Chuck and Teak Hewitt*



*Michaella Gaines, Suzanne and Daniel Sigman,  
Perry Pickel, and Tina Noohi*



*Barbara Anthony, Frederic Clifford,  
and Dr. Tobias Barker*





PioneerPublic

# Building a Government that Works for Everyone

In 2017, Pioneer’s major initiatives to promote effective and accountable government resulted in reforms to public transit as well as programs focused on child welfare, mental illness, and elder care. At the MBTA, the Department of Children and Families, and Bridgewater State Hospital, the Baker administration implemented many of Pioneer’s recommendations for improvements that have already achieved measurable progress and made a palpable impact on the lives of workers, families, and the most vulnerable across Massachusetts.

## Advancing Affordable, Reliable & Modern Public Transportation

The MBTA is a critical engine of Massachusetts’ economy, responsible for transporting hundreds of thousands of commuters to and from their jobs each day. But with a \$7.3 billion maintenance backlog, the aging system’s core infrastructure and customer service technology are sorely in need of modern upgrades. The agency’s key challenges include identifying cost savings that can be invested in service improvements and increasing ridership to produce more revenue, reduce road congestion, and generate environmental benefits.

After record winter storms incapacitated the MBTA in 2015, the Baker administration and the Legislature adopted Pioneer’s proposal to establish a Fiscal and Management Control Board (FMCB) to overhaul the agency’s finances and operations. As a result of the FMCB’s reforms, the MBTA’s projected operating deficit has been significantly reduced.

Pioneer has provided thought leadership and rigorous data analysis that have informed the agency’s strategic planning process and decision-making. Pioneer successfully made the case in op-eds and on the air for reauthorization of the control board for two additional years, and will continue pushing to extend the MBTA’s three-year exemption from the state’s anti-privatization Pacheco Law, which has already reduced expenses by \$400 million. Warehouse and parts delivery, as well as oversight of the cash-counting department, are among the areas in which privatization yielded substantial savings and improved service quality. Savings from the exemption have enabled the T to invest \$100 million in winter resiliency and make \$140 million available for capital maintenance. Despite this progress, the state Senate, responding to resistance from the MBTA Carmen’s Union, adopted a budget amendment that would limit the exemption.



Minted from 1916–1947, this half dollar presents Liberty approaching the rising sun and an eagle ready to take flight (adjacent to *E Pluribus Unum*), reflecting an emerging world power.

## 2017 Impact

### *Our Successes Include:*

- Pioneer's proposals led to an overhaul of the MA Department of Children & Families' intake practices, training, and response.
- Pioneer's recommendations resulted in sweeping changes to Bridgewater State Hospital's governance, treatment resources, information sharing, and accountability.
- The MBTA adopted Pioneer's proposal to outsource state-run paratransit services, reducing costs and improving satisfaction.
- The MBTA leveraged the Pacheco Law waiver to negotiate a new union contract, saving hundreds of millions of dollars.
- The MBTA saved hundreds of millions of dollars by adopting Pioneer recommendations to privatize services, including warehouse and parts delivery, bus maintenance, customer service, and cash handling.
- The FY2018 state budget allows MBTA Retirement Fund assets to be moved to the state pension fund, a Pioneer suggestion.
- Pioneer signed onto an amicus brief that supported workers' first amendment rights in *Janus v. AFSCME*, a momentous U.S. Supreme Court case.

**“Progress at the MBTA is hard won. Sometimes it takes targeted privatizations; other times, it requires compromise with the unions. Neither is possible without the Pacheco Law exemption. Shame on the Senate for turning its back on the T’s hundreds of thousands of riders.”**

**– Jim Stergios, *The Boston Globe***

The MBTA was also able to leverage the Pacheco Law waiver to negotiate a new contract with the Carmen's Union that will save the T over \$250 million in the next decade. The T has forged ahead with plans to adopt Pioneer's proposal to outsource state-run paratransit services after a successful pilot program. Pioneer's 2017 Better Government Competition recognized the T's partnership with ridesharing services as a finalist for reducing costs from \$59 to \$9 and saving customers an average of 34 minutes per trip.

In another victory for a long-standing Pioneer proposal, the Baker administration has authorized the transfer of the MBTA Retirement Fund's assets to the state pension fund. Shifting to the higher-performing state system, which Pioneer has recommended in over a dozen published reports, op-eds, and media appearances, is an important step in saving the fund from insolvency, reining in MBTA costs, and restoring public trust.

MBTA employer contributions to the fund have more than doubled over the last decade to \$87 million annually, yet the system's unfunded liability has grown from less than \$50 million in 2005 to over \$1 billion, largely due to generous employee benefits and poor investment returns. In a 2016 study covered by *The Boston Globe* and other outlets, Pioneer also called for moving T employees out of Social Security (state employees are not part of Social Security), an added benefit that was authorized by an obscure and antiquated federal law, and is accessible to only 4 percent of Massachusetts public employees.



Pioneer Institute is the Bay State's most effective advocate for a more customer-focused public transit system. Help us continue to make the case for competitive contracting and pension reform to improve service and reduce costs at the MBTA.

*Make a gift today!*



“Expanded ferry service is a great opportunity to get people off the highways at less expense than any other option. It costs less than any other service in terms of taxpayer subsidies because of very low capital costs.”  
– Greg Sullivan, *WGBH News Radio*



In addition to cost savings, another important challenge the T must address is boosting revenue through increased ridership. Pioneer published two reports: *Aim High on MBTA Ridership: A big-picture take on the T's strategic plan*, estimating the T could generate up to an additional \$250 million through higher traffic on each mode; and *Is it Time to Expand Water Transportation in Greater Boston?* presenting the benefits of expanding the MBTA ferry service, including low upfront costs and reduced congestion. Pioneer received extensive media coverage, including *WGBH* and *Bloomberg* radio interviews, mentions in the *State House News Service*, *The Bond Buyer*, *The Boston Business Journal*, and columnist and editorial endorsements from *The Boston Globe*, the *Boston Herald*, and other news outlets in the state's coastal communities.

### ***Transforming Lives: Bridgewater State Hospital***

For decades, Bridgewater State Hospital has been a blight on Massachusetts' reputation as a national leader in progressive social change. The only hospital in the country managed by a corrections department, it commingled mental health patients with convicts, and subjected inhabitants to isolation and gross mistreatment, in some cases resulting in fatalities.

Pioneer published a highly acclaimed 2016 report recommending a number of sweeping changes to Bridgewater State's governance, including improvements to treatment operations, better information sharing between the Departments of Mental Health and Corrections, and more accountability among facility operators. Pioneer also dedicated its 2016 Better Government Competition to the topic of mental illness to introduce local leaders to successful pol-

icies enacted in other states and promote improved treatment for this population.

In response, the Baker administration implemented a major overhaul of the facility that included hiring a management firm and replacing the guards with trained security and clinicians specially equipped to meet the needs of mentally ill patients. As a result, the patient seclusion rate has dropped by 99 percent, the use of extreme physical restraints has fallen by 98 percent, and the state prison now functions more like a hospital, with former jail cells transformed into dormitory rooms. These reforms have won praise from mental health and criminal justice advocates locally and nationally.

### ***Fixing a Broken System: The Department of Children & Families***

In 2014 and 2015, after a string of horrific news stories about criminal abuse and neglect of children in the care of the state's youth protection agency, Pioneer offered detailed, concrete proposals to reform the agency's case management model, including its intake and track assignment practices, and improvements to its technological resources. Pioneer also shined a spotlight on the issue with its 2014 Better Government Competition, recognizing as the contest's top prize winner an Ohio-based technology firm that reduces paperwork and bureaucracy at protective services agencies across the country so social workers can spend more time interacting with families.

In the years since, the Baker administration has implemented many of Pioneer's proposals, reaching an agreement with the social workers' union on policy changes to their tracking and intake models. As a result, the agency has reduced its caseloads, upgraded its technology, developed

## MBTA Secret Perks



Pioneer collaborated with WBZ's I-Team on an investigative report about a secret perk giving some MBTA employees personal use of unmarked vehicles owned by T contractors. The vehicles were returned to the MBTA after the broadcast aired.

**“It seems like a very shifty operation. There are no separate payments for these vehicles. It’s all bundled into the contract price, so there is absolutely no transparency.”**

**– Mary Connaughton, CBS Boston**

a standardized guide for case workers and managers, and created a single child protection response. With the nation’s highest child abuse rate, Massachusetts continues to face serious challenges, but social workers now spend more time with families, and repeat allegations of child abuse have decreased.

### *Promoting Public Trust & Civic*

#### **Engagement: Government Transparency**

Massachusetts residents deserve to know how public officials are spending their tax dollars. Unfortunately, this information is often difficult to access. One of Pioneer’s critical roles is to help bring greater transparency to local and state government, whether through partnerships with investigative journalists, original research and analysis, or open government web tools accessible to everyday citizens.

When local media stations need a trusted source to provide context and offer recommendations in cases of public-sector waste and abuse, they call on Pioneer’s senior staff, including Jim Stergios, Greg Sullivan, and Mary Connaughton, for their insight based on decades of experience in state government. In 2017, Pioneer appeared in several investigative news stories, including special travel benefits provided by MBTA contractors and inflated salaries for bridge operators, environmental police, and civilian flaggers due to overtime rules and the state’s prevailing wage law.

Pioneer has called on public leaders to improve their stated commitment to government transparency. Part of this effort included sending open letters to state leaders calling for the elimination, through an executive order or other formal device, of the Governor’s Office’s “Executive Order” privilege, exempting it from the state’s public re-

ords law. In a *WGBH News* op-ed, Mary Connaughton and Greg Sullivan also urged greater accountability in the state Legislature, which voted without public input to increase stipends for legislative leaders, amounting to a 40 percent pay raise.

The Institute also conducts original research through its active team of college student and recent graduate interns who are eager to learn the skills of investigative reporting. Each year, the Institute trains a new team to utilize Pioneer’s growing suite of online government transparency applications, including MassOpenBooks, MassAnalysis, MassPensions, and MassReportCards, to develop or further explore topics for commentary that are published on Pioneer’s blog throughout the year.

The 2017 team took an in-depth look at a wide range of state and local issues, including Massachusetts state college finances. They found that tens of thousands of dollars have been spent on commencement speakers, and they published a three-part blog series showing that administrator salaries have been rising, regardless of student outcomes, while public funding has decreased. Further, at some of the Bay State’s community colleges, presidents have seen dramatic pay raises.

In 2017, Pioneer released the “MBTA Analysis” website, a new addition to its Government Transparency Toolkit that provides year-by-year comparative data on costs and performance for the MBTA and other transit agencies across the country. The online database offers access to the same Federal Transit Administration data Pioneer used in its groundbreaking report on bus maintenance costs to help identify problems on specific transit modes and lines, and to improve public accountability for the MBTA’s performance. The website was covered in *The Metro*, the most widely read print news outlet among T riders.





“ Brian Shortsleeve, MBTA chief administrator, appreciates the Pioneer Institute’s help in keeping the public informed about not only the MBTA, but also public transit systems across the country. He said the MBTA is strongly committed to transparency while it navigates away from decades of mismanagement.”

– *The Metro*

## Know Your Government: Valuable Tools to Help You Navigate Massachusetts Public Policy

**Whether you’re a parent, daily T rider, town selectperson, public sector retiree, or concerned citizen, Pioneer Institute is a one-stop shop for useful tools that tell you how effectively your state and local government is meeting your everyday needs.**



**MassOpenBooks:** With this online database, users can look up state employee salaries by employee name, department, and secretariat; pension payments to retired state and K-12 education employees; and payments made to individual and business vendors by state and quasi-public agencies, as well as higher education.



**MassAnalysis:** Pioneer has reintroduced this online tool with the most up-to-date information available from the Department of Revenue and FBI. Users can develop a dashboard for their community based on revenues, expenditures, demographics, employment, crime, debt, education, financial strength, taxes, and transportation.



**MBTAAAnalysis:** This web-based data tool provides year-by-year performance ratings for the MBTA and peer transit agencies. Users can view information on capital expenditures, operating expenses, and operating efficiencies, by year and travel mode.



**MassReportCards:** With this application, users can compare schools and school districts based on MCAS results, teacher quality, attendance, discipline, and other important metrics; and even rate schools.



**MassPensions:** This tool grades municipal pension systems based on the number of years left to become fully funded; it also shows the number of active and retired members in a plan, and plan expenses. Users can view data on funds’ assumed rate of return, asset allocation, and investment performance.





BETTER GOVERNMENT COMPETITION

## Aging in America

**F**or nearly three decades, Pioneer Institute's Better Government Competition has been canvassing the country to identify and promote practical solutions to real-life challenges in policy areas ranging from healthcare, housing, and education to economic opportunity and criminal justice. Pioneer's 26<sup>th</sup> annual Better Government Competition, "Aging in America," attracted the most promising proposals to make aging a meaningful and productive time of life.

The winning Better Government Competition entry was Hebrew SeniorLife's initiative, *Right Care, Right Place, Right Time: Effectively Integrating Senior Care and Housing*, a housing model which provides coordinated services to help vulnerable seniors live independently. The program embeds teams in elderly residential complexes to serve as links between housing and healthcare, establishing relationships with residents, collaborating on wellness and prevention efforts, and reducing medical costs.

Finalists included Minnesota's Return to Community Initiative, a partnership that has helped private paying nursing home residents transition to a community setting and saved \$9.6 million; an affordable housing model for older adults with developmental disabilities, jointly managed by

the Jewish Community Housing for the Elderly and Jewish Family & Children's Service; a collaboration between the MBTA's paratransit service and ride-hailing companies that has reduced costs and trip duration, and increased user satisfaction; a proposal from the University of Wisconsin-Madison and Wisconsin Alzheimer's Institute for states to create incentives for early detection of Alzheimer's Disease; and Encore Boston Network's replicable model for engaging older adults leaving the workforce as volunteers for under-staffed government agencies.

A distinguished panel of independent judges with backgrounds in medicine, government, law, and business reviewed the 2017 submissions, including: Charles Baker, Sr., Professor *Emeritus*, Northeastern University's College of Business Administration; Nick Dougherty, Program Director, PULSE@MassChallenge; Gary P. Kearney, M.D., F.A.C.S., Board Director, Pioneer Institute; Robin Lipson, Chief of Staff and Chief Strategy Officer, Executive Office of Elder Affairs, Commonwealth of Massachusetts; James F. Seagle, Jr., President, Rogerson Communities; and Joanna Weiss, freelance journalist, and former *Boston Globe* columnist.



**"Jim Stergios and the Pioneer team, the Governor, Elder Affairs Secretary Bonner, and others who have put together the Governor's Council on Aging are doing more in the Commonwealth than almost anywhere else I've seen in the country. We need to think differently if we want to live differently, to live longer and better lives... We need to build a "cathedral" of longevity about not just what we can do to muddle through, not just what we can do to help those who need help, but to redefine 100 years of quality living."**

**– Dr. Joseph Coughlin, Keynote Speaker**





“ Our endgame is a sustainable model that can be replicated anywhere, one where our entire health system sees savings because we shift savings from emergency rooms to preventative wellness... Equally as important, seniors are motivated and supported to create and meet goals, and to maintain their independence as long as possible.”

– Kim Brooks, Chief Operating Officer, Senior Living, Hebrew SeniorLife & Winner, 2017 Better Government Competition



At the June awards gala, Massachusetts Governor Charlie Baker discussed his administration’s initiatives on transportation, healthcare, and his new council to address healthy aging. The Keynote Speaker, MIT AgeLab’s Joseph Coughlin, nationally renowned author and expert, provided a stimulating presentation on the future of aging and the new paradigm of living longer.

*Left: Polly Townsend, Augusta and Randy Ayer*

*Middle: Pam Layton, Bruce Johnstone, Edward Bousa, and Jake Layton*

*Right: Margaret Carr, Will and Mary Kauppila*

*Bottom Back: Joseph and Emily Coughlin, Stephen and Elizabeth Fantone, First Lady Lauren Baker, Alice Bonner, Governor Charlie Baker, Brian Shortleeve, and Janet Wu Bottom Front: Charlie Baker, Sr.*

“ This organization, this event, for years and years has been a source of wonderful ideas and terrific innovation, and I want to, on behalf of the Commonwealth, thank you for your leadership and your work in so many different spaces.”

– Charles D. Baker, Jr., Governor of Massachusetts



Pioneer Opportunity

# Ensuring Growth & Prosperity Throughout the Commonwealth

*Massachusetts is among the top states in the country for economic opportunity, boasting strong income and employment levels, GDP growth, vast talent pools, high productivity, and significant patent activity. The state, especially the Greater Boston area, serves as a hub for innovation and entrepreneurship, and is headquarters to national and multinational businesses. Long gone are the discussions of the hollowing out of the state's economy.*



The Kennedy Half Dollar, first minted in 1964 in honor of the fallen President, remains in use; the reverse includes a version of the national coat of arms, depicting an eagle clasp an *E Pluribus Unum* scroll.

**P**ioneer sees three themes as crucial to future economic success in Massachusetts. The first undergirds Pioneer's education and healthcare work, and that is increasing economic mobility. Pioneer Opportunity, the Institute's economic policy center, focuses on ensuring a competitive environment to build on Greater Boston's already impressive growth and providing a data-driven platform so municipal, regional, and state policymakers can extend opportunity to every corner of the Commonwealth.

## Enhancing Greater Boston's Global Competitiveness

New growth in life sciences companies, multinational headquarters, advanced manufacturing, and research and development and knowledge-based sector start-ups are not a matter of happenstance. Progress in these areas required forethought, smart policy decisions, and major tax reforms. Policymakers can build on that success and keep the region's economic engine humming, but that means state leaders cannot take for granted the current economic times. Further reforms and action to address growing pains related to transportation and housing will be needed to maintain the Bay State's competitiveness.

Starting in 2018, the Institute will focus new work on several industries that are foundational to the region's economic viability such as the financial services, elite consulting (legal, real estate, research) services, and the life sciences. This will include the formation of working groups and a focus on resolving key issues in each of these sectors.

In the coming year, the Institute will redirect its transportation portfolio towards taking advantage of our public transit and private transportation providers to address congestion and support further economic growth. Pioneer will continue to generate ideas for cost savings and operational improvements at the MBTA, but more of our attention will be directed to opportunities such as new water taxi services, where the MBTA should invest in order to increase service



quality and therefore attract new riders and new revenues. As part of this new focus, we will be tying several transportation proposals to housing reforms that can relieve some of the affordability pressures that are working against local families and companies who hope to recruit even more talent to the region.

Finally, PioneerOpportunity will engage energetically in conversations related to the cost of doing business in Massachusetts and the retention of wealth and talent, including all-important debates surrounding tax and regulatory policies.

### *Extending Growth Statewide*

While Greater Boston continues to experience strong business and job growth, barriers to prosperity persist in many other of the state's regions. These are often related to a lack of access to high-quality educational opportunities, infrastructure needs, and municipal government processes. A significant challenge for municipal, regional, and state policymakers is that they have an information deficit. Policymakers don't have reliable access to quality economic data, resulting in two major consequences. First, the diverse needs and impacts of policy changes are not clear to state or even local officials; and, second, in the absence of dependable information municipalities often resort to formulating economic policy on the basis of what is most familiar — that is, what is best for Greater Boston.

**For the last two years, Pioneer has promoted the idea of a \$20 million infrastructure investment fund to jumpstart economic activity in these cities. We will do so again this year.**

Pioneer has long recognized the varied regional needs of our state, having issued numerous publications on the 14 older, industrialized cities in the Commonwealth from New Bedford to Pittsfield, and Lowell to Holyoke. These have included small business guides to local regulations; studies on education, public safety, economic, and financial policies; and reports on business growth. For the last two years, Pioneer has promoted the idea of a \$20 million infrastructure investment fund to jumpstart economic activity in these cities. We will do so again this year.

In 2018, however, Pioneer will help fill the regional and statewide information gap, in partnership with the University of Wisconsin and Northeastern University, by creating an online tool based on 21 years of data on every firm in Massachusetts. The data covers sales, employment, firm age, movement, growth and contraction, sector, and location. In developing this online resource, the Institute will tell the story of the Massachusetts economy, through reports, graphics, and media pieces, from every possible angle, including municipal, regional, and statewide geographic snapshots and sector and subsector analyses.

Our state has tremendous economic prospects on the horizon. Pioneer will be an active player as challenges and opportunities arise.

## 2017 Impact

### *Our Upcoming Products Include:*

- Proposals to address congestion through new water taxi services, and housing reforms that can improve affordability and help attract more talent to the region.
- Formation of working groups to help resolve key issues in industries central to Greater Boston's economic viability, such as financial services, life sciences, and elite consulting (legal, real estate, research) services.
- Creation of an online tool, in partnership with the University of Wisconsin and Northeastern University, that draws on 21 years of data to describe the Massachusetts economy.



Media

# Broadening Our Reach & Targeting Relevant Audiences

When it comes to holding public officials accountable, the Greater Boston media market's most recognizable personalities turn to Pioneer Institute's senior staff for their extensive government expertise, sharp commentary, and fresh insights. In a political and news climate that increasingly resembles an echo chamber, Pioneer also serves as a crucial voice for everyday citizens seeking both sides of the story.



**“For state employees, UMass is like nirvana — you want to work there.”**

— Greg Sullivan on Fox 25 Investigates: “Six-figure earners, double dippers at UMass President’s Office”

There's no better time to connect directly with and cultivate the growing audience eager to consume Pioneer's particular brand of high-quality, research-based content.

Pioneer engages with policymakers, business leaders, the media, and the public through the steady distribution of reports, infographics, videos, op-eds, blogs, tweets, and Facebook posts targeted by interest, demographic, and location. Our strategy seeks to transform casual readers into enthusiastic ambassadors and activists for our cause. Pioneer's 2017 communications successes include tripling our Facebook fanbase, attracting nearly half a million views for our pro-charter school video campaign, and producing Pioneer's first feature-length documentary film highlighting real families across America who have been impacted by state laws limiting school choice.

### TRADITIONAL MEDIA

Op-eds  
89

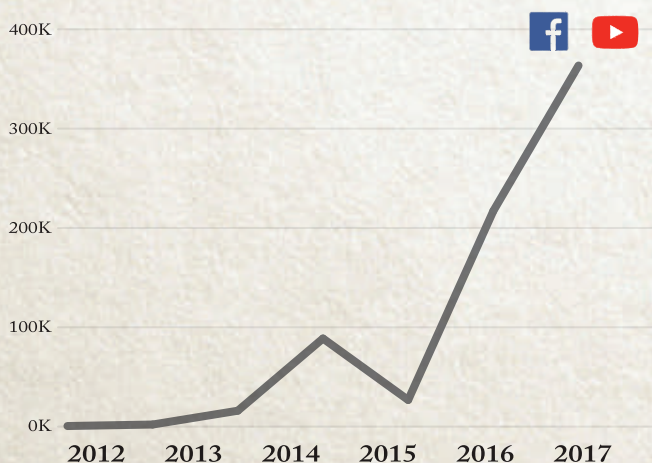
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### SOCIAL MEDIA IMPRESSIONS

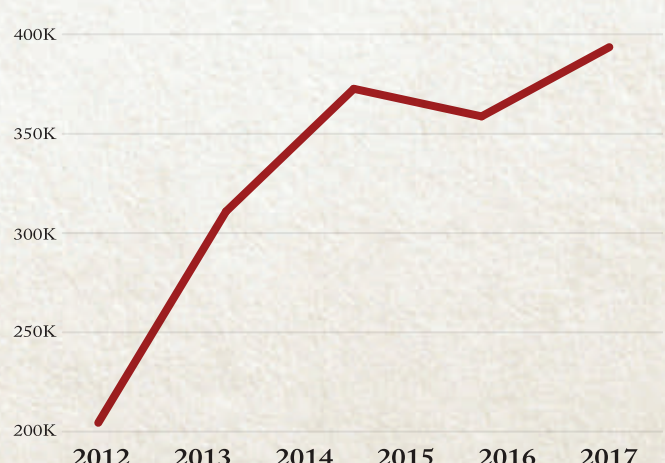
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2.18M

Facebook  
4M

Video Views



Web Traffic





“Now that the teachers unions won the Question 2 campaign, they need to show the public that they can adopt the policies and practices that have made charter public schools so successful.”

– Jim Stergios,  
*CommonWealth* magazine

“One influential group of social scientists, the Pioneer Institute, has been on a mission to return the study of history to its proper academic place. This concerted campaign seeks to make knowledge of history a high-school graduation requirement, and eventually elevate U.S. history to a MCAS-level test.”

– Editorial,  
*The Lowell Sun*



“Over the past 25 years, there has not been a single education reform that has moved the needle more than charter schools especially in terms of what they’re doing for poor and minority kids, the vast majority of whom are in urban areas, and they are dramatically outperforming their peers in district schools.”

– Pioneer Senior Fellow  
Charlie Chioppo debated  
State Representative Paul  
Heroux on *NECN*’s “The  
Take with Sue O’Connell”

“Given that the federal government contributes approximately 10% of the total spending in the nation’s sprawling, decentralized landscape of 100,000 public K–12 schools, it is neither plausible nor desirable that an Education secretary chase the chimera of a transformational national education policy.”

– Jim Stergios & Charles Chioppo



“The bottom line, unfortunately, is that the rights of Massachusetts consumers to know the price of healthcare procedures that they are paying for are still not being taken seriously by hospitals and those people in control of our healthcare.”

– Barbara Anthony,  
*MassLive*

“It’s a system gone haywire when people can get paid for more than 24 hours in a single day. People often wonder how officers can possibly earn more in OT than in regular pay. With rules like these, it shouldn’t be a surprise.”

– Mary Connaughton,  
*Boston Herald*

“Americans are not knowledgeable in our history. I think knowledge about history and civics contributes to people’s ability to perform the prerogatives of citizenship.”

– Tom Birmingham,  
*The Boston Globe*

“Telemedicine is a toolkit that can save money while improving virtually every part of the health care system. If Massachusetts is serious about controlling its high costs, there is no better next step than to expand its use.”

– Scott Haller,  
*WBUR CommonHealth*

“Over the last decade, the commonwealth’s district and school accountability system has largely been pro forma and toothless. Now, Beacon Hill special interests want to further water down educational accountability by diminishing student test scores as a measure and, of course, throwing even more money at the problem.”

– Jamie Gass,  
*Boston Herald*

“As the MBTA pension’s financial condition continues to worsen, state taxpayers are on the hook even though there is little transparency and no state oversight of the fund.”

– Greg Sullivan,  
*The Boston Globe*

“The idea of standards-based education was to say that all kids will have access to the same high-quality curricular materials and schools would be held accountable for raising the bar no matter where they lived or what their background was. The use of growth measures creates an educational accountability system that accepts ‘separate but equal’ as a matter of fact – and rewards schools based on the different populations they serve.”

– Jim Stergios,  
*CommonWealth* magazine



## Events

# Testing Opinions, Opening Minds

Central to Pioneer Institute’s mission is the free exchange of ideas. That is what has made Pioneer one of the leading organizations in New England at facilitating open dialogue among participants with diverse viewpoints, so that audiences can gain multiple perspectives and a more substantive understanding of the most critical public policy debates in the Commonwealth and across the nation.

Each year, Pioneer Institute hosts a jam-packed calendar of public forums, signature events, and member receptions. Some speakers and topics directly address our policy agenda, while others broaden the focus beyond our usual scope, but all are timely and important.

The *Hewitt Healthcare Lecture* brings together the top minds in medical research and practice, public health experts, industry stakeholders, and government officials to address the nation’s most critical issues or learn about

the latest innovations in the healthcare field. Dedicated to the memory of former Pioneer chairman Colby Hewitt, the event is held each spring at the Harvard Medical School.

The *Better Government Competition Awards Gala* is a prestigious recognition ceremony to honor the winners and finalists of Pioneer’s long-running citizens’ ideas contest, the Better Government Competition. The event features a keynote speaker renowned for his or her success in an area thematically related to the contest topic, and attracts Boston’s most prominent corporate, non-profit, and political leaders.

The *Lovett C. Peters Lecture in Public Policy*, named for Pioneer Founder and Chairman, “Pete” Peters, is the Institute’s annual tribute to its core supporters: a prestigious dinner keynoted by a visionary individual whose accomplishments have transformed our world.

### MEMBER LUNCHEON

#### “OverFed? Credit and the Federal Reserve”

Author and national columnist John Tamny

10.13.16



### MEMBER RECEPTION

#### “Reflections on the Bench”

Former Massachusetts Supreme Judicial Court Justice Robert J. Cordy

2.7.17

### PUBLIC FORUM

#### “The War to End All Wars: Teaching the First World War in Schools”

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

4.4.17

OCT

NOV

DEC

JAN

FEB

MAR

APR

### PUBLIC FORUM

#### “The Life You Save: Catholic Schooling & the Liberal Arts in the 21st Century”

Father George W. Rutler, Paul Elie, and Anthony Esolen

11.14.16



### PUBLIC FORUM

#### “A Fire You Can’t Put Out: Rev. Fred Shuttlesworth, Civil Rights, and School Choices”

Sephira Shuttlesworth, Diane McWhorter, Andrew Manis, and Rev. Liz Walker

3.20.17



### NEW LEADER RECEPTION

#### A Conversation on Immigration

Peter Skerry, Professor of Political Science, Boston College

4.3.17

### MEMBER LUNCHEON

#### Overview of Pioneer Institute

4.20.17



*Top Left: Richard Bowers, Ann Spence, and Liz Allison Top Center: Dede Bowers and Cile Hicks Top Right: Nancy Bradley, Tony Jarvis, Jim Stergios, and Bob Bradley  
Bottom Left: Brent Johnstone, Arisa and David Boit Bottom, Center Left: Al and Pat Houston Bottom, Center Right: Richard Schmalensee, Laura Morse, Gary Kearney,  
Beverly and Bob Brown Bottom Right: Holt Massey, Laury and Nancy Coolidge*



**MEMBER LUNCHEON**  
**“Bottleneckers:  
 Gaming the Government  
 for Power and Private Profit”**  
 Dick Carpenter, Director of Strategic  
 Research, Institute for Justice  
**5.2.17**

**MEMBER RECEPTION**  
**A Conversation with  
 R. Nicholas Burns**  
 The Roy and Barbara  
 Goodman Family Professor,  
 Kennedy School of Government  
**5.24.17**

**MEMBER RECEPTION**  
**Young Professionals  
 Networking Event,  
 co-sponsored by  
 America’s Future  
 Foundation**  
**8.24.17**

MAY JUN JUL AUG SEP OCT NOV



**SIGNATURE EVENT**  
**2017 Hewitt  
 Healthcare Lecture:  
 “Evolving Healthcare  
 Delivery Models”**  
 Paul F. Levy,  
 Dr. Tobias Barker,  
 Fay Donohue,  
 Dr. Rushika Fernandopulle,  
 and Rob Graybill  
**5.3.17**

**SIGNATURE EVENT**  
**26<sup>th</sup> Annual  
 Better Government  
 Competition  
 Awards Gala**  
 Joseph F. Coughlin,  
 Founder and Director,  
 MIT AgeLab  
**6.19.17**

**SIGNATURE EVENT**  
**Lovett C. Peters Lecture:  
 “Politics & Polarization  
 on College Campuses”**  
 Dr. Jonathan Haidt,  
 Professor, New York  
 University’s Stern  
 School of Business  
**11.7.17**





2017  
LOVETT C. PETERS LECTURE  
in Public Policy

## Politics & Polarization on College Campuses

**D**r. Jonathan Haidt, social psychologist, author, and professor, was the honoree at Pioneer Institute’s 2017 Lovett C. Peters Lecture in Public Policy. Dr. Haidt is a leading national commentator on America’s growing political divisiveness and intolerance of diverse points of view, especially at colleges and universities.

In recent years, campuses across America have seen escalating incidents of violence and censorship in the name of greater “tolerance.” Dr. Haidt explored the factors contributing to this crisis, including growing ideological polarization, the “helicopter parent” phenomenon, and social media. He also addressed its negative impact on civil dialogue among students, and implications for American democracy; and shared his thoughts on how to move beyond the current impasse.

Dr. Haidt is the Thomas Cooley Professor of Ethical Leadership at New York University’s Stern School of Busi-

ness, and author of two books: *The Happiness Hypothesis: Finding Modern Truth in Ancient Wisdom* (2006) and *The Righteous Mind: Why Good People are Divided by Politics and Religion* (2012), a *New York Times* bestseller. His four TED talks have been viewed more than five million times.

The annual Lovett C. Peters Lecture, named for Pioneer Institute’s founder and long-time chairman Lovett C. Peters, is one of Pioneer’s signature events. It honors individuals distinguished for the significance of their contributions to society, and serves as an expression of gratitude to our core supporters. Past speakers include Khan Academy founder Sal Kahn, UCSF Gladstone Institute director Dr. Deepak Srivastava, then-Mayor and current U.S. Senator Cory Booker, former Governor Jeb Bush, Harvard history professor Niall Ferguson, Success Academy Charter School founder Eva Moskowitz, and Admiral James Stavridis, among others.



“Students arrive fragile and what do colleges do? They accommodate. Hire more deans and therapists to keep protecting them. Education should not be intended to make people comfortable; it is meant to make them think.”  
– Dr. Jonathan Haidt, Keynote Speaker

**Top Left:** Kristin and Roger Servison **Top Center:** Tom Birmingham, Tom Palmer, Pam Layton, Brent Johnstone, and Bruce Johnstone **Top Right:** Dr. Jonathan Haidt **Bottom Left:** Ray Stata, Co-founder, Analog Devices **Bottom Center:** Andrew Davis, Florence Bourgeois, and Robert Storer **Bottom Right:** Jake Layton, Ted Alford, and Steven Akin





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#### *Fred Thorne*



Pioneer Institute honors the life and work of Fred Thorne, a longtime Pioneer Board Director and major contributor to the Institute. Fred built a successful career in investment banking, beginning at State Street, becoming CEO of several firms, and founding Harbor Capital Management Company, Inc. He served on numerous committees and boards both in the investment industry and the non-profit sector, including Massachusetts Eye and Ear Associates, the Beverly Hospital, the Shore Country Day School, the World Peace Foundation, Bowdoin College (which awarded him an honorary doctorate in 2005), and Pioneer. Fred's intelligence, thoughtful judgment, and kindness will be missed.



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**T**his campaign is about driving immediate and long-term change in the Bay State to take advantage of a unique moment in Massachusetts' history — to create a society where more of our citizens can prosper. It is about establishing a vision for how Massachusetts can lead the nation on the issues that are most important to quality of life. Since 1988, Pioneer has championed big reforms in education, healthcare, government efficiency and transparency, and economic development. Our momentum has been building; Pioneer now has the ability to drive the public discourse in a way that was unimaginable not so long ago. Partner with us to make the next 25 years even better for free markets, education, innovation, prosperity, and opportunity in Massachusetts.



The Peters Legacy Society

#### *Pioneer wishes to thank the following members*

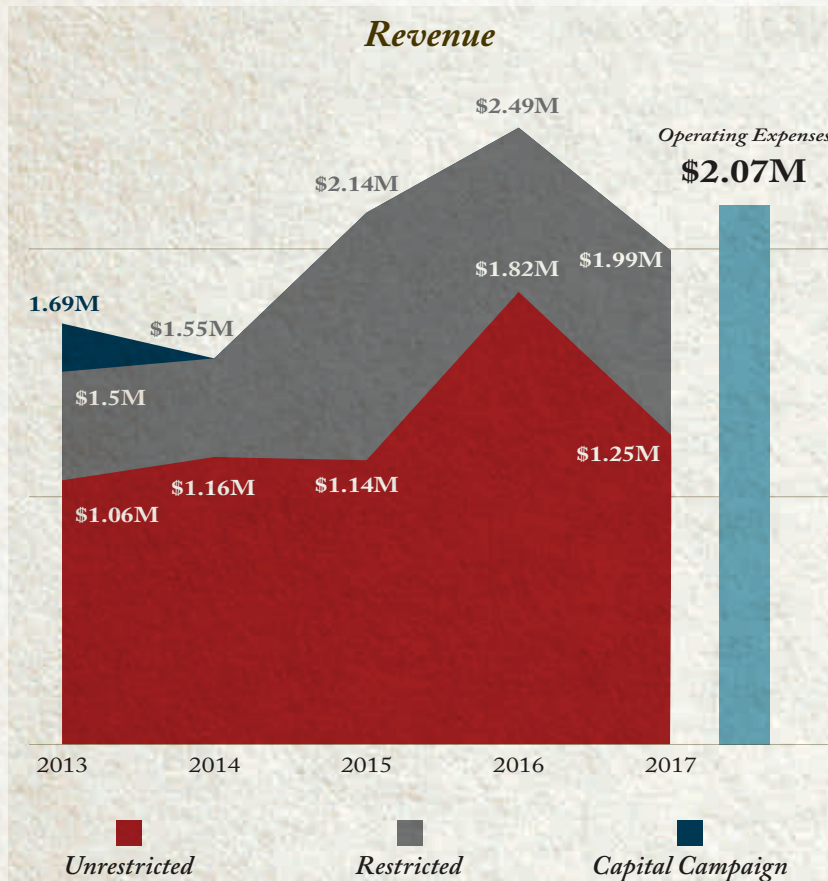
- |  |  |
|--|--|
| <i>Jane &amp; Steven Akin</i>          | <i>Mary Myers Kauppila</i>             |
| <i>Frederic &amp; Barbara Clifford</i> | <i>Mark &amp; Lynne Rickabaugh</i>     |
| <i>Stephen &amp; Elizabeth Fantone</i> | <i>Diane &amp; Richard Schmalensee</i> |
| <i>Ellen &amp; Bruce Herzfelder</i>    | <i>Kristin &amp; Roger Servison</i>    |
| <i>Alfred &amp; Patricia Houston</i>   | <i>Frederick Thorne†</i>               |
| <i>C. Bruce &amp; Holly Johnstone</i>  | <i>William &amp; Anngennette Tyler</i> |
| <i>Gary &amp; Susan Kearney</i>        | <i>Kingman Webster†</i>                |
|  | <i>Peter &amp; Sally Wilde</i>         |

*Learn more about planned giving opportunities by visiting [pioneerinstitute.org/giving-to-pioneer](http://pioneerinstitute.org/giving-to-pioneer)*





# Financials



## Revenues & Expenses

### REVENUE

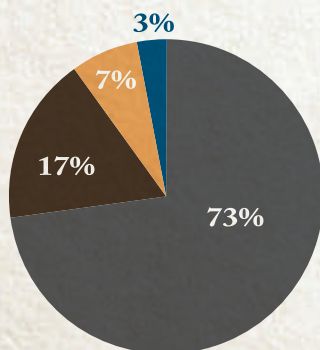
Unrestricted Donations	\$1,208,531
In-Kind Donations	17,500
Restricted Donations	742,568
Other Revenue	20,330
<b>Total Revenue</b>	<b>1,988,929</b>

### EXPENSES

Employment Costs	1,223,302
Outside Services	106,942
Research	218,523
Printing & Publishing	62,565
Distribution Costs	97,368
Events & Meetings	213,063
Staff Business Expenses	28,512
Office Operations	101,282
Internet/Website	16,702
<b>Total Expenses</b>	<b>2,068,259</b>

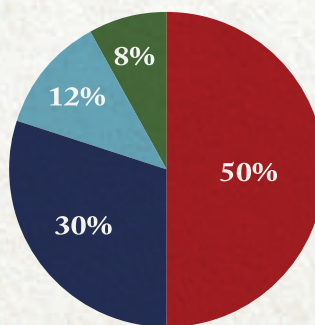
Other Income	51,879
Other Expenses	(56,172)
<b>Decrease in Net Assets</b>	<b>\$(83,623)</b>

### Expenses By Category



■ Research & Programs  
■ Development  
■ Operations  
■ Communications

### Expenses By Research Area



■ PioneerEducation  
■ PioneerPublic  
■ PioneerHealth  
■ PioneerOpportunity

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

## Financial Position

### ASSETS

Cash	\$269,829
Contributions Receivable	189,884
Investments	2,020,360
Property & Equipment	889,427
Other Assets	192,392
Long-term Contribution Receivable	50,000
<b>Total Assets</b>	<b>\$3,611,892</b>

### LIABILITIES & NET ASSETS

Accounts Payable & Other Accrued Expenses	\$106,410
<b>Total Liabilities</b>	<b>106,410</b>

### NET ASSETS

Unrestricted Funds	2,477,317
Temporarily Restricted Funds	742,453
Permanently Restricted Funds	285,712
<b>Total Net Assets</b>	<b>\$3,505,482</b>

**Total Liabilities & Net Assets** **\$3,611,892**



# Senior Fellows

## Education



**Thomas Birmingham**, previously State Senate President and architect of the landmark 1993 Education Reform Act, focuses on academic standards, U.S. History and Civics, and vocational-technical education.



**Cara Stillings Candal** is an education researcher and writer, and a senior consultant for curriculum and content at the National Academy of Advanced Teacher Education.

## Healthcare



**Barbara Anthony**, a well-known consumer advocate, is advancing healthcare price and quality transparency at Pioneer, and is also Senior Fellow at the Harvard Kennedy School.



**Joshua Archambault** focuses on the implementation of healthcare reform in Massachusetts, and promotes patient empowerment and access to high-quality, affordable care.

## Media



**Chase Bosworth** is Pioneer's inaugural Jane & Steven Akin Digital Media Fellow, supporting Pioneer's communications strategy.



**Charles Chieppo** provides policy writing and editing services and strategic advice on media relations, and is the principal of Chieppo Strategies.

## 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.

## Life Sciences



**William Smith** is focusing on the life sciences industry at Pioneer, after spending over 25 years in government and corporate public affairs.

# Center Advisory Boards

## Education

Dr. Kenneth Ardon,  
*Salem State College*

Kenneth Campbell,  
*IDEA Public Schools*

Cornelius Chapman, Esq.,  
*Burns & Levinson LLP*

Nancy Coolidge,  
*Miffin Fund*

Dr. Charles Glenn,  
*Boston University*

Ed Kirby,  
*Education Consultant*

Dr. Kathleen Madigan,  
*AccountabilityWorks*

Dr. Paul Peterson,  
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Gerard Robinson,  
*Center for Advancing Opportunity*

Dr. Sandra Stotsky,  
*Emerita, University of Arkansas*

Henry M. Thomas,  
*Urban League of Springfield*

Polly Townsend,  
*Philanthropist*

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*Massachusetts Business Roundtable*

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*John Adams Innovation Institute*

Thomas Finneran

Peter Forman,  
*South Shore Chamber of Commerce*

John Friar,  
*Northeastern University*

Ryan Hayden,  
*PricewaterhouseCoopers*

Bill Rennie,  
*Retailers Association of Massachusetts*

## Public

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*Burns & Levinson LLP*

Charlie Chieppo,  
*Chieppo Strategies*

Katherine Craven,  
*Babson College*

Bruce Herzfelder

Tom Keane

Pat McGovern,  
*Beth Israel Deaconess Medical Center*

Paul S. Russell, M.D.,  
*Massachusetts General Hospital*

Brian Wheelan,  
*Beacon Health Strategies*

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Mark Landy, *Boston College*

Harvey C. Mansfield, Jr.,  
*Harvard University*

R. Shep Melnick, *Boston College*

Peter Skerry, *Boston College*



# Staff

*We believe in the power of individuals to transform society. Pioneer's Board brings together prominent individuals with backgrounds in science and engineering, government, finance, investment, insurance, banking, accounting, medicine, philanthropy, venture capital, and law. Our staff draws on experience in manufacturing, education, government, real estate development, investigative research and audits, consulting, accounting, and healthcare.*



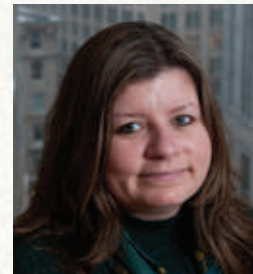
**Jim Stergios**  
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**Mary Z. Connaughton**  
Director of Government  
Transparency & Finance



**Lauren Corvese**  
Development  
Coordinator &  
Research Assistant



**Micaela Dawson**  
Director,  
Communications



**Stephen D. Fantone**  
Chairman



**Jamie Gass**  
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for School Reform



**Shawni Littlehale**  
Director,  
Better Government  
Competition



**George Parker**  
Director of  
Individual Giving



**Brian Patterson**  
Director, Annual Fund



**Roger Perry**  
Development



**Greg Sullivan**  
Director, Research

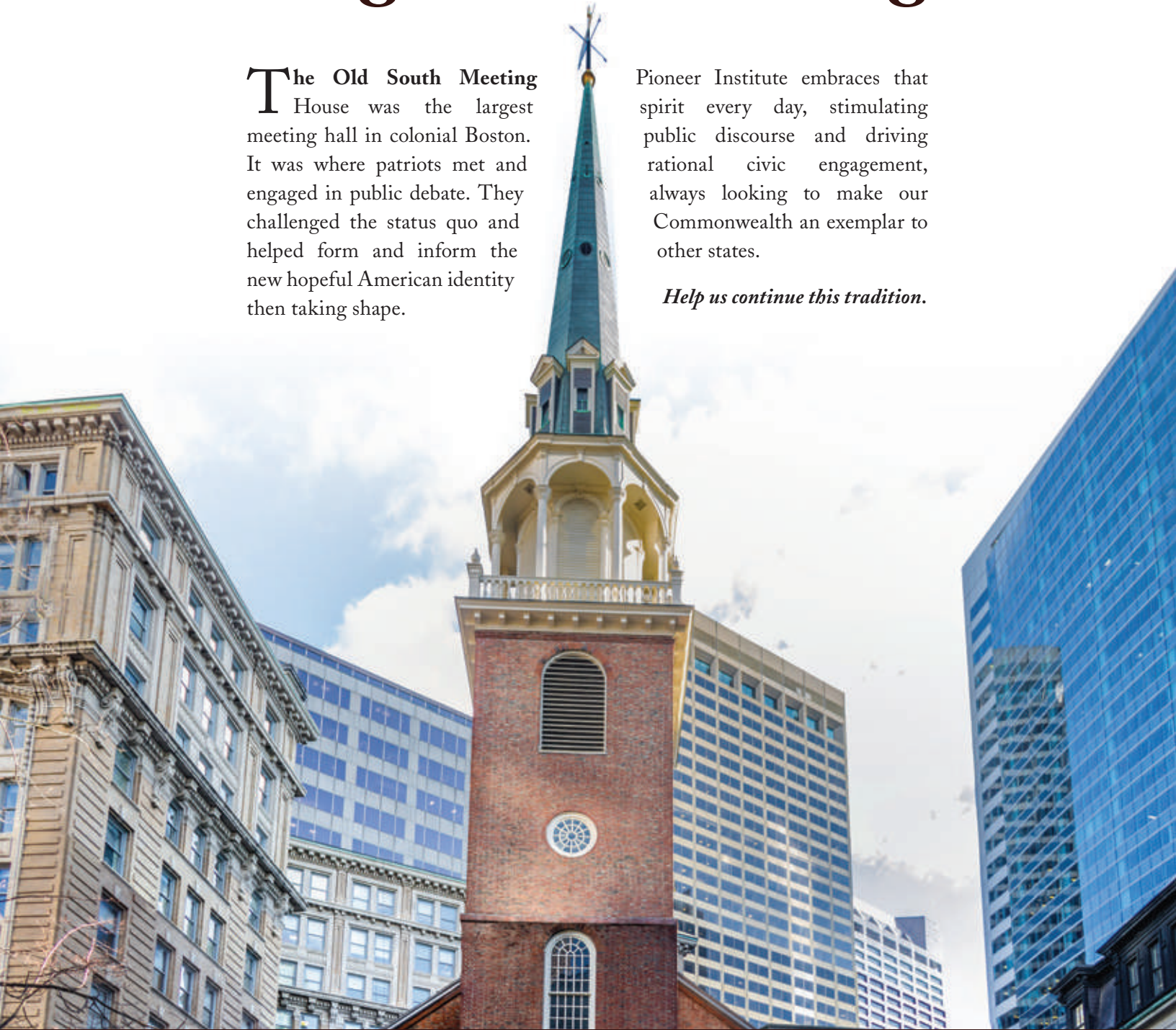


# *Inspired by the Past, Facing Future Challenges*

**T**he Old South Meeting House was the largest meeting hall in colonial Boston. It was where patriots met and engaged in public debate. They challenged the status quo and helped form and inform the new hopeful American identity then taking shape.

Pioneer Institute embraces that spirit every day, stimulating public discourse and driving rational civic engagement, always looking to make our Commonwealth an exemplar to other states.

*Help us continue this tradition.*



**MAKE YOUR TAX-DEDUCTIBLE  
CONTRIBUTION TODAY.**





**PIONEER INSTITUTE**  
PUBLIC POLICY RESEARCH

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