

NEW CAPACITIES

Accelerating Impact



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Pioneer Institute, founded in 1988, is an independent, non-partisan, privately funded research organization whose **mission** is to develop and communicate dynamic ideas that advance prosperity and civil discourse in Massachusetts and beyond.

Pioneer's **vision of success** is a state and nation where our people can prosper and our society thrive because we enjoy world-class options in education, healthcare, transportation, and economic opportunity, and where our government is limited, accountable, and transparent.

Pioneer **values** an America where our citizenry is well-educated and willing to test our beliefs based on facts and the free exchange of ideas, and committed to liberty, personal responsibility, and free enterprise.



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

NEW CAPACITIES, ACCELERATING IMPACT

Our 2021 annual report to you—our donors and friends—carries two clear messages. First, the pandemic has not deterred Pioneer from significant victories in our strategic focus areas—education, healthcare, and economic opportunity.

Nationally, Pioneer followed up on the U.S. Supreme Court’s June 2020 *Espinoza* decision by working on the ground with local partners in 10 states. All 10 passed laws expanding or establishing new educational choice programs. Pioneer’s life sciences policy team was essential in the U.S. Health and Human Services Secretary’s recommendation to avoid discriminating against the elderly and disabled when it comes to access to treatments.

In Massachusetts, Pioneer’s efforts yielded a state settlement with Catholic and Jewish Day schools, new investment in vocational-technical schools, permanent telehealth flexibility, removal of bureaucratic barriers for thousands of physicians, modernization of sales-tax collections, and more.

Pioneer’s government transparency work led to improvements in the state’s reporting on Covid cases and deaths in long-term care facilities. Importantly, we provided thought leadership on the constitutional tax amendment that will be on the ballot in November 2022.

Second, under our five-year strategic plan, we are transforming Pioneer, making big institutional changes to enhance Pioneer’s impact locally and nationally in 2022 and beyond. Understanding the challenges ahead, we are redefining the think

tank model, developing new capacities, including the creation of PioneerLegal, a new 501(c)(3) public interest law firm focusing on education, government transparency, and economic freedom.

More institutional change is underway. We are

- Growing our commitment to K–12 education with a new focus on civics and democracy building;
- Expanding our communications team to double our audience reach and engage students virtually and in-person; and
- Recruiting new talent to drive “idea generation” and further strengthen the Institute’s board and governance.

This institutional capacity-building will make Pioneer more effective and better positioned to drive strategic policy improvements in our priority areas. In 2022 and beyond we will see continued growth across America in our education and life sciences initiatives, areas where the Institute has a comparative advantage.

None of this work or impact is possible without you. We are grateful for your trust and investment. We are excited by the opportunities for impact that our new capacities make possible. We are building for impact now and in the future, and we

ask for your continued—and, we hope, enhanced—generosity in 2022.

The pandemic did not deter Pioneer from its strategic objectives—we have noteworthy victories to share.

Jim Stergios
Executive Director



Adam Portnoy
Chair



BY THE NUMBERS

229,735
FOLLOWERS

Total Media Reach:
3.05B

Total Downloads of Pioneer Research:
148K

Events Featuring Pioneer:
37

Attendees
530
Average Per Pioneer Event
(In-Person & Virtual)



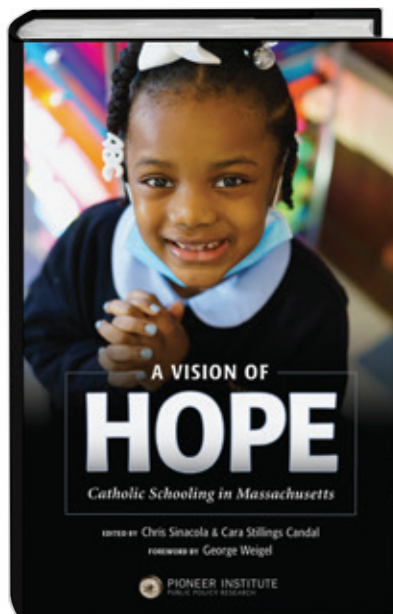
Publications:
33
Research Papers, Policy Briefs, Testimony, & Event Transcripts

Media Hits:
3,159
Articles, Interviews, & Editorials in Newspapers, Trade Journals, TV, & Radio in Massachusetts & Across the Nation

STRENGTHENING SCHOOL CHOICE & CIVIC ENGAGEMENT

America's kids deserve a high-quality K-12 education that equips them for a successful life: well-educated teachers and learning environments that meet them where they are and keep them intellectually engaged, whether in-person or through online learning. In 2021, inspired by the landmark *Espinoza* decision in the U.S. Supreme Court, Pioneer helped advance a follow-on case, *Carson v. Makin*, and tax-credit scholarships that make private and religiously affiliated schools affordable for hundreds of thousands of low-income families. Pioneer also promoted Catholic, Jewish, and other private schools, balanced history and civics instruction, as well as vocational-technical education, an important public choice and workforce training option.

In 2021, Pioneer highlighted the benefits of religious education, publishing a book on Massachusetts Catholic schools' success and distributing a state policy toolkit across the country on programs to expand access to private schools. The Institute also supported the plaintiffs in the *Carson v. Makin* Supreme Court school-tuition case, as well as special needs students denied federal funding because they attend religious schools.



Catholic school enrollment
Increased by
4,000
STUDENTS
IN BOSTON

Aided by Pioneer's research...

- The U.S. Supreme Court, in its landmark *Espinoza* decision, severely weakened barriers to religiously affiliated school choice, and has heard a second pivotal school choice case, *Carson v. Makin*.
- Nearly 22 states, targeted by Pioneer and its energetic outreach, have passed laws to expand or establish private school choice programs.
- Massachusetts Catholic and Jewish day schools received a \$3.8 million settlement in special education funding wrongfully denied to them by the state education department.
- Catholic school enrollment in Boston grew by 4,000 students, and by 14 percent across Massachusetts.
- Governor Baker announced an additional \$18 million to expand vocational-technical education.

PioneerEducation director Jamie Gass participated in a video interview with Melodie Wyttenbach, executive director of the Roche Center for Catholic Education at Boston College.

Interview Highlight

Melodie: What might *Espinoza* mean for states like Maine and Massachusetts?

Jamie: *Espinoza* essentially nullifies Blaine amendments in many of the almost 40 states that have them. A state does not have to have a school choice program, but if they do, they cannot exclude religiously affiliated parents from participating. In the last year, this has led to an enormous expansion of vouchers, tax credit scholarships, ESAs—22 states have expanded or established school choice programs. We'll soon find out where this heads, but it is highly likely that the Supreme Court will side with the plaintiffs in *Carson v. Makin*, another significant win for religious liberty and school choice in the United States. But we're going to need sustained leadership to undo these barriers to school choice.



MELODIE WYTTEBACH
Executive Director,
Roche Center for Catholic
Education at Boston College



JAMIE GASS
Director,
PioneerEducation



Highlighting Catholic Schools

During National Catholic Schools Week, Pioneer launched a book, *A Vision of Hope: Catholic Schooling in Massachusetts*, co-edited by Pioneer senior fellow Cara Candal, to help promote the benefits of Catholic education in other states. Pioneer advertised the book through webinars in partnership with National Catholic Educational Association, Catholic University of America, and Thomas More College featuring nationally syndicated columnist and Pope St. John Paul II biographer George Weigel, U.S. Supreme Court plaintiff Kendra Espinoza, and Boston Catholic Schools Superintendent Tom Carroll; traditional media coverage in *First Things*, *EWTN*, *Catholic World Report*, *Catholic News Service*, *The Pilot* and *RealClearPolicy*; and social media campaigns garnering 2 million impressions. Against the tide of Catholic school closures across the country, these schools have increased by 4,000 students in Boston, and by 14 percent across Massachusetts.

“The Court’s willingness to hear this Maine case... holds the promise of furthering our framers’ original vision of schooling firmly grounded in religious liberty.”

– Jamie Gass

AP

Advancing the Rights and Liberties of Religious Parents

The landmark 2020 Supreme Court decision, *Espinoza v. Department of Revenue*, dealt a major blow to Blaine amendment barriers to school choice in 40 states, and the Court is set to hear a similar case, *Carson v. Makin*, brought by parents in Maine who were denied state tuition assistance for local, faith-based schools. Pioneer filed an *amicus* brief which has played a key role in

developing the fact base for the plaintiffs' counsel at the Institute for Justice, and helped publicize it through its podcast, a virtual policy briefing with the plaintiff's lead counsel, and media appearances in *RealClearPolicy* and the *Associated Press*.

Pioneer is also working with Catholic and Jewish Day school leaders, actively seeking plaintiffs to litigate on Massachusetts' special education laws and regulations, as state officials continue to use anti-aid amendments to discriminate against religious school students and families. Pioneer's research estimated that up to \$300 million in federal Individuals with Disabilities Education Act (IDEA) funding was improperly withheld from these schools over several years. The Institute joined forces with religious groups on follow-up research, paired with a webinar, that

revealed similar behavior in other districts across the country. This information and advocacy helped these Massachusetts schools win a \$3.8 million settlement.



Kendra Espinoza and her two daughters.



The "Year of School Choice"

2021 has been called the "Year of School Choice," after nearly 22 states passed laws to expand or establish private choice programs, including vouchers, education tax credits, and education savings accounts. Pioneer is proud of its role in that wave, with the launch of an education tax credit scholarship toolkit, authored by EdChoice's Jason Bedrick. Paired with an animated explainer video, website, and social media campaign garnering nearly 200,000 views and 2.5 million impressions across all platforms, it was targeted at policymakers, advocates, and church groups in ten of the states that won legislative victories. Bedrick was interviewed about the toolkit in *The 74*, a national education policy publication; and it was featured in *RealClearEducation* and *WGBH*.



This information and advocacy helped these Massachusetts schools win a

\$3.8 MIL SETTLEMENT

HELP US CONTINUE TO FIGHT for quality educational opportunity for all students!

MAKE A GIFT
pioneerinstitute.org/donations/



Investing in Our Future Workforce: Vocational-Technical Education

Since 2007, Pioneer has supported expanding vocational-technical schools in Massachusetts, and PioneerEducation director Jamie Gass was the 2009 recipient of an award from the Massachusetts Association of Vocational Administrators (MAVA). In 2022, the Institute will publish a book co-edited with MAVA and a policy toolkit aiming to export lessons from the Bay State's nation-leading voc-tech schools to strengthen both school choice and workforce development in key industries post-COVID.

Pioneer released a pair of reports, covered by *The Boston Globe* and featured in *RealClearEducation*, recommending improvements at Boston's only voc-tech school, Madison Park. The reports were cited by candidates in Boston's mayoral election. Pioneer also published a *Commonwealth* magazine op-ed touting voc-techs' innovative approaches to address pandemic-related restrictions, and their 2-percent enrollment increase at a time when public schools saw a 5-percent decline. Pioneer also developed an interactive online hub for families, distributed through a social media campaign that has generated over a million social media impressions. Governor Baker recently announced an additional \$18 million over the next three years for expansion of vocational education efforts across the Commonwealth.



NEW BOOK

“Hands-On Achievement: Massachusetts’ National Model Vocational- Technical Schools”

With an introduction from Pioneer's Tom Birmingham and former Massachusetts Governor Bill Weld, co-authors of the landmark 1993 Massachusetts Education Reform Act, this book will offer a roadmap for Massachusetts and other states to improve and expand their vocational-technical educational options.

COMING SPRING 2022!



NEW



*Civics 2.0
E-Learning Project*

In 2022, Pioneer is embarking on a new project to promote civics education to K-12 students through a user-friendly, Khan Academy-style online educational clearinghouse for high-quality, curated lessons to excite and engage students.

MAKE A GIFT TODAY TO SUPPORT THIS INITIATIVE!

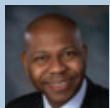
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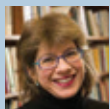
Civics 2.0: Preparing a Strong Citizenry

Contentious debates across America about history instruction in classrooms signal an urgent need for rigorous, balanced content in our shared civic past and founding principles. Pioneer is proud of our decades-long initiative to strengthen history and civics content through public forums, student essay contests, opinion polls, research, and media appearances. More recently, Pioneer has produced podcasts covering every major American era, with guests such as Pulitzer Prize winners Gordon Wood and David Hackett Fischer, and has published op-eds on the best (and worst) approaches to civics content. Pioneer’s Jamie Gass served as a panelist in online events with FreedomWorks that reached 50,000 viewers, a student event at Boston College, and as a judge in the We the People national student competition. He also curated hundreds of curriculum materials on history and government, promoted online and via email. As the nation grappled with critical race theory debates, Pioneer held a virtual policy briefing on race relations with AEI Senior Fellow Gerard Robinson and produced a podcast episode with Robert Woodson, Sr., of The 1776 Unites project.

GUESTS



Jason Riley
Wall Street Journal columnist on the presidential election, school choice, and race in America



Susanna Heschel
Distinguished Professor of Jewish Studies at Dartmouth College, and daughter of noted 20th-century Jewish theologian and Civil Rights-era leader, Rabbi Abraham Joshua Heschel



Robert Woodson, Sr.
Founder and president of the Woodson Center and 1776 Unites project

THE LEARNING CURVE

is Pioneer’s weekly K-12 education podcast, featuring high-profile experts on the most timely topics in America. Help us ensure that the podcast reaches a broader audience!

CO-HOSTS

Cara Stillings Candal & Gerard Robinson



MAKE A GIFT TODAY pioneerinstitute.org/donations/

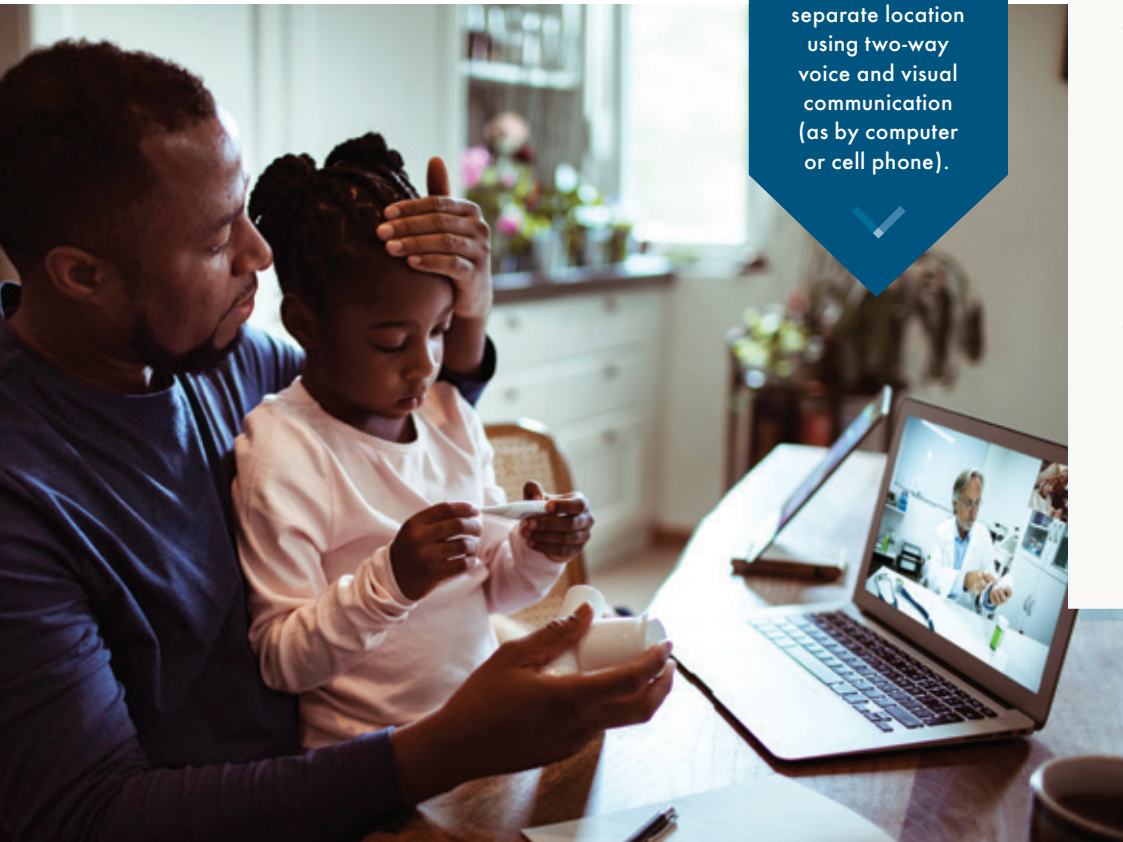
ACCELERATING INNOVATION, FLEXIBILITY & ACCESS

Patients should be at the center of every aspect of America's healthcare system. Pioneer's efforts aim to increase access to life-saving therapies, enable more convenient and affordable care, and highlight accurate information about public health risks. In 2021, Pioneer expanded its Life Sciences Initiative—which will further expand in 2022—advancing policies at the national, state, and local levels to encourage faster development of cutting-edge treatments for widespread and rare diseases. The Institute also helped enhance telehealth during and well beyond the pandemic. And its scholars' work prompted state officials to provide more accurate reporting about Covid prevalence, especially in eldercare facilities.

TELEHEALTH:
healthcare provided remotely to a patient in a separate location using two-way voice and visual communication (as by computer or cell phone).

Aided by Pioneer's research...

- The U.S. Secretary of Health and Human Services recommended avoiding cost-effectiveness review methodologies because of the impact on people with disabilities and chronic conditions.
- State lawmakers in Connecticut and Massachusetts have filed legislation rejecting these discriminatory practices.
- The Massachusetts legislature passed a bill to make permanent telehealth flexibility and other pandemic healthcare changes that removed bureaucratic barriers for thousands of physician practitioners.
- The Massachusetts Department of Public Health made key transparency improvements to its reporting of Covid cases and deaths in long-term care facilities.



“The disconcerting aspect of ICER's report is the authors' obvious lack of knowledge about how businesses work. This is particularly troubling because ICER is based in Boston, the most important cluster of life sciences companies in the world.”

– William Smith



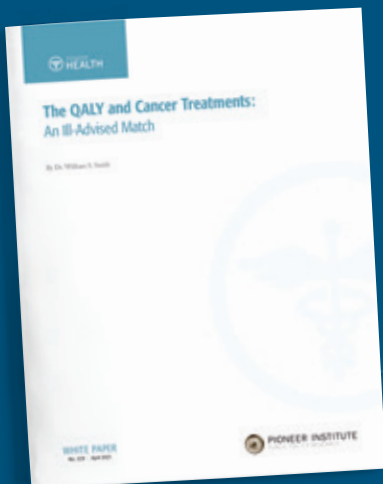
Unleashing Life-Saving Innovation

Biomedical innovations are transforming and extending human lives, and the U.S. leads the world in incubating new treatments for cancer, chronic illnesses, and rare diseases, as well as Covid-19 vaccine development. Pioneer’s work in the life sciences aims to support the policy environment that would foster these advancements, such as the elimination of regulatory barriers to future innovations and reimbursement options that drive innovation.

In 2021, Dr. William Smith published a report on the impact of cost-effectiveness methodologies such as the Quality Adjusted Life Year (QALY) on cancer patients. The study generated nearly half a million social media impressions, largely among Washington, D.C. policy and healthcare influencer audiences. He also gave a briefing on Capitol Hill, and presented before the American Society of Gene & Cell Therapy, and other national conferences;

joined webinar panels with Pacific Research Institute, and the Esiason Foundation; presented to the annual meeting of Rare Cancers Australia, the largest patient advocacy group in Australia; appeared on several podcast episodes on life sciences issues for Pioneer’s Hubwonk, “The State of Health” with Gunnar Esiason, and other outlets; gave print and radio interviews and placed op-eds in both regional and national publications, including *RealClearHealth*, *The Washington Examiner*, *Commonwealth magazine*, and *STAT News*.

Following these efforts, the U.S. Secretary of Health and Human Services issued a report recommending that QALY should be avoided. A Connecticut legislator reintroduced a bill rejecting the methodology’s discriminatory practices, and a similar bill has been filed in Massachusetts. And the Biden administration’s Build Back Better proposal avoided the use of the QALY to value drug therapies.



The study generated nearly
1/2 MILLION
 SOCIAL MEDIA IMPRESSIONS

& COVERAGE IN

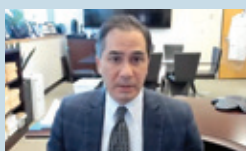


Hewitt Healthcare Lecture: “Discovery, Development, Delivery: A Behind-the-Scenes Look at the Covid-19 Vaccine”

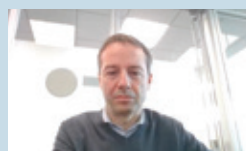
May 18, 2021

Pioneer Institute’s 14th Annual Healthcare Lecture featured two panel discussions on the future of vaccine development and delivery, with expert perspectives from Pfizer, Moderna, Johnson & Johnson and more, on how the pandemic drove more efficient processes in R&D, distribution, and policymaking to benefit patients across America.

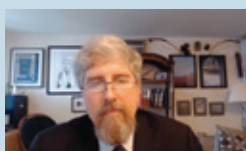
PANELISTS



Dan Barouch, M.D., Ph.D.



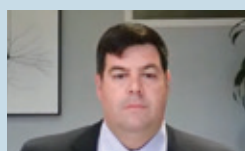
Dr. Andrea Carfi



Philip R. Dormitzer,
M.D., Ph.D.

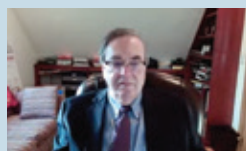


Michael Curry, J.D.



Steve Walsh

MODERATORS



Jeffrey S. Flier, M.D.



Pamela Layton



Safeguarding Covid-era Healthcare Reforms

Pioneer Senior Fellow Josh Archambault has been working toward greater adoption of telehealth and other reforms to enhance flexibility in the healthcare system since well before Covid. When emergency orders temporarily loosened restrictions, Massachusetts patients saw the benefits. In a 2021 report covered in the *Associated Press* and the *Boston Herald*, Archambault called for making these changes permanent. In response, the state legislature enacted a bill to preserve and expand telehealth, and allow nurse practitioners to independently practice.

Archambault also co-authored research with the Mackinac Center on direct healthcare, a model in which patients pay practices a set monthly fee. They found that it reduces costs and emergency room and inpatient care visits while increasing patients’ satisfaction.

One of the provisions in President Biden’s \$2 trillion “Build Back Better” spending bill would permanently expand Affordable Care Act (ACA) subsidies. Writing in *Forbes*, Archambault outlined congressional action that was needed to avoid harmful impacts on those with pre-existing conditions, and the three million patients who would lose job-based insurance under such an expansion.

Panelists: Dan Barouch, M.D., Ph.D. (Harvard Medical School); Dr. Andrea Carfi (Moderna Therapeutics); Philip R. Dormitzer, M.D., Ph.D. (Pfizer); Michael Curry, J.D. (Massachusetts League of Community Health Centers); Steve Walsh (Massachusetts Health & Hospital Association).
Moderators: Jeffrey S. Flier, M.D. (Harvard University Distinguished Service Professor; former Dean, Harvard Medical School) and Pamela Layton (CEO, 4Immune Therapeutics).

Ensuring Transparency & Prevention

As healthcare costs consume over 30 percent of household budgets, Archambault and Pioneer Senior Fellow Barbara Anthony collaborated on a *Boston Globe* op-ed calling on the state Department of Public Health (DPH) to review its controversial Determination of Need (DoN) program. This program will determine the fate of recent billion-dollar proposals by two major, high-cost hospital systems to extend into suburban locations already served by less expensive community hospitals. Pioneer called for a thorough analysis of the proposals' impact on healthcare costs and the market power currently wielded among high-cost facilities in Massachusetts. The state's Public Health Council is considering these proposals.

Anthony, a long-time consumer advocate, has also been focused on addressing Massachusetts' high mortality rate in state-regulated eldercare facilities and among

older citizens. Working with attorney David Clancy, she has recommended several measures to address the lack of systematic transparency and possible underreporting in eldercare facilities. In 2021, with the onset of the Delta variant, Pioneer urged the DPH to standardize its reporting methodology, and developed online trackers for case and death prevalence in long-term care facilities and hospital admissions by age group. Anthony's analysis received coverage in *The Boston Globe*, *WGBH*, *Boston 25*, *NBC10*, and other outlets. In response, the DPH began providing far more accurate and timely data. To further press the state to disclose information about its methods, which resulted in a significant drop in publicly reported deaths in nursing homes (from 9,000 to 6,000), Anthony and Clancy filed the most extensive request Pioneer has ever submitted with state healthcare regulators over Covid transparency.



“We’re talking about seniors in facilities where in many cases they really have no choice... People have a right to know what the situation is with respect to Covid in each of these facilities.”

– Barbara Anthony

The Boston Globe

NEW

Pioneer Life Sciences Initiative (PLSI)

Based in the world's biomedical hub, the Institute is launching the Pioneer Life Sciences Initiative (PLSI) to support a policy environment that can lead to cutting-edge therapies, ensure they can be brought to market quickly, and remove barriers to patient access. Dr. William Smith, PLSI director, will advise industry executives and state and local policymakers, partner with patient advocacy groups, and advance model legislation in key states.



Dr. William Smith

MAKE A GIFT TODAY TO SUPPORT THIS INITIATIVE!

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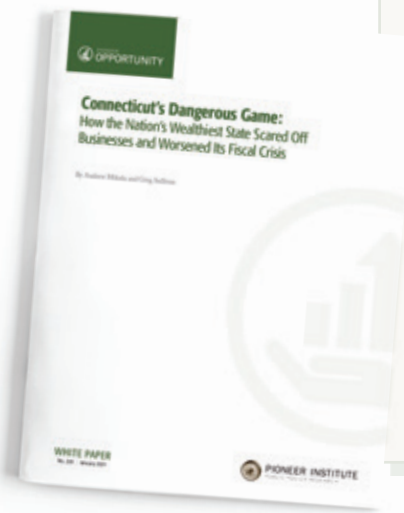
CHAMPIONING TRUE TAX FAIRNESS & ECONOMIC RECOVERY

Across America, runaway inflation, persistent unemployment, the Covid virus, and governments' often-inconsistent responses to these challenges are creating economic uncertainty. Small businesses struggle to reopen at full capacity. Larger firms face supply-chain problems, material shortages, and more. Families, especially those living at or near the poverty line, are hardest-hit by spiraling prices. Against this backdrop, here in Massachusetts, union-backed special interests have convinced the state legislature to place questions on the November ballot that would raise taxes on job creators, family businesses, and many retirees by 80 percent, and place new restrictions on employers of gig workers—both of which would be inimical to job growth. Pioneer Institute has taken the lead to educate the public about the negative impacts of these measures, especially on average citizens and disadvantaged communities. As we advance these efforts in 2022, especially as public attention focuses on these important debates, we remain deeply grateful for your support of our scholars' work.

A Leading Voice Opposing the Graduated Income Tax

The graduated income tax proposal is a top issue facing the Commonwealth in 2022. Pioneer is working proactively to counter proponents' false "tax fairness" narrative, and prevent a return to "Taxachusetts."

In 2021, Pioneer drove the topic into the spotlight, releasing 17 reports by Pioneer research director Greg Sullivan and researcher Andrew Mikula, analyzing the measure's harmful impact. These reports raised concerns about wealth migration to low-tax states, exacerbated by increased worker mobility; lessons from high-tax



Aided by Pioneer's research...

- A coalition of business leaders has been vocal about the negative impacts of the proposed graduated income tax in Massachusetts.
- Governor Baker modernized sales tax collection from large businesses, and relaunched an effort to enact a charitable giving deduction.
- Governor Baker announced a plan to invest in broadband internet in underserved areas, and moved to cap the commissions that third-party delivery services could charge restaurants.
- The MBTA deferred voting on major service cuts, and tripled capital delivery since 2015.
- The Massachusetts Department of Transportation is pursuing an all-at-grade design as part of the Allston I-90 Interchange project, reducing costs, construction time, and economic impacts.

states that are shedding jobs; and misleading claims that a ‘yes’ vote will lead to significant new revenues for education and transportation.

This extensive research was released with infographics and videos that generated nearly five million social media impressions. The Institute submitted public testimony to the legislature as it was preparing to vote on adding the question to the ballot. Pioneer’s research and related activities earned over 500 media mentions, with op-eds featured in *The Boston Globe*, *RealClearPolicy*, *The Chicago Tribune*, and all major Greater Boston radio and TV outlets. Videos from a virtual policy briefing featuring tax experts from Stanford and Ernst & Young and moderated by the editor of *The Boston Business Journal* earned over 250,000 video views across Pioneer’s platforms. Pioneer also launched a new Massachusetts-focused web and social media presence, Taxachusetts, which built a healthy following of deeply-committed citizens and reached nearly 1.5 million Bay State residents.

“With billions of dollars already migrating to New Hampshire under the Commonwealth’s current 5 percent income tax, imagine the wealth drain that would ensue were Massachusetts to adopt a top rate of 9 percent.”

– Jim Stergios

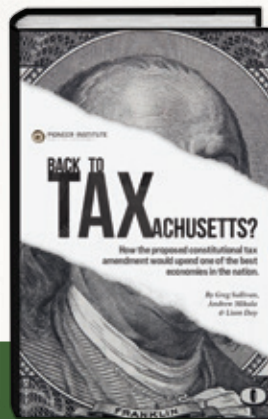
The Boston Globe



This extensive research generated nearly

5 MILLION
SOCIAL MEDIA IMPRESSIONS

NEW BOOK
RELEASE DATE
SPRING 2022



How the proposed constitutional tax amendment would upend one of the best economies in the nation

The graduated income tax proposal in Massachusetts will hurt retirees and small businesses, cost our economy investments and jobs, and make our Commonwealth less competitive. In 2022, Pioneer is compiling research from over 20 reports into one volume that it will distribute across the state.

MAKE A GIFT TODAY:
pioneerinstitute.org/donations/

8 REASONS THE GRADUATED INCOME TAX ISN'T GOOD FOR MASSACHUSETTS

1 Who wants to emulate Connecticut? Massachusetts should not follow the same policy that has caused an exodus of businesses and jobs out of Connecticut and California.

2 It gives the legislature a "blank check": as was noted in a 2018 Massachusetts Supreme Court case, the tax revenues will be fungible.

3 Not a "fair share" and not a "millionaires" tax: Almost two-thirds of those impacted are not "millionaires" but rather families selling an asset they have built over decades.

4 It is a tax on retirement for tens of thousands who sell a home, asset or business in order to create a "nest-egg" for the future.

5 It is a tax on small pass-through businesses and it would tax small businesses at a higher rate than large corporations.

6 It cannot be undone: Repealing it would take years and require approval by two consecutive legislatures, followed by another statewide referendum.

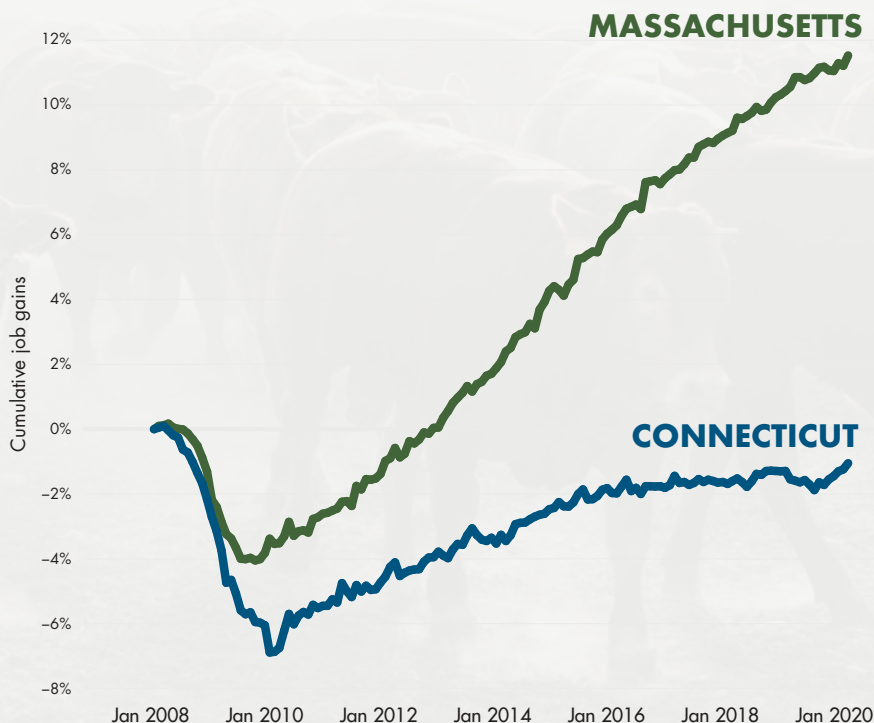
7 State government is awash in surplus and unspent cash: In FY21, state revenue exceeded

budget expectations by \$13 billion. Seven months into FY22, tax collections are already \$3 billion ahead of projections. Finally, our state still has \$4.8 billion in unspent federal stimulus funds.

8 The Massachusetts tax code is already "fair": Contrary to tax proponents' claims, Massachusetts has a more progressive state tax code than 29 other states.

Two States, Two Paths

For over a decade, Connecticut has chosen the path of taxing job creators and businesses. Over the same period, Massachusetts' path of private sector growth and innovation has truly paid off for everyone.



"It's really dumb to [raise taxes on the wealthiest] just by the state" and doing so would "totally disadvantage the state." "[Connecticut] already [has] some of the highest income tax rates in the country and we pay a price for that."

– Connecticut Governor Ned Lamont (D), while expressing support for raising taxes on the wealthiest at the national level





Helping Hardest-Hit Industries

Pioneer’s 2020 studies on hardest-hit industries and sales tax collection included dozens of specific recommendations aimed at helping businesses in retail, restaurant, hospitality and other sectors recover from the pandemic shutdown. Many of those ideas came to fruition in 2021. Governor Baker included a provision in the \$626 million economic development package that limits commissions that companies such as Grubhub and DoorDash can charge restaurants. He announced a plan to invest in broadband internet in underserved areas with low-income residents. He also signed into law a modernization that will speed up the timetable for sales tax remittance and collection from large businesses, at a time when state sales tax revenue was plummeting. In addition, Pioneer called for the legislature to stop delaying implementation of the charitable tax deduction that was supposed to go into effect in 2020. The Governor relaunched an effort to keep the legislature from again deferring it.

Massachusetts voters will decide in November whether to formally classify “gig workers,” such as Uber and Lyft drivers, as independent contractors. Thousands are employed in the Commonwealth, many from immigrant communities, and they enjoy the flexibility to make their own schedule. Pioneer will work to support them and educate the public about the impact of this measure.

Getting Back to Work

Reliable and affordable transportation, whether on roads or rails, is essential to economic recovery and growth. Pioneer continues to advocate for a public transit system that operates efficiently and provides a safe and reliable commuting experience for the Bay State’s 1.3 million riders. In 2021, after Pioneer released a statement objecting to major proposed service cuts, the MBTA board deferred voting on them. Two Pioneer studies published in 2019 recommended how to address the T’s chronic inability to spend available state and federal capital funds, noting that the system had left more than 40 percent of capital funds unspent from 2015–18. The MBTA has since implemented many of Pioneer’s ideas, and capital delivery has tripled.

The MBTA has since implemented many of Pioneer’s ideas &

CAPITAL DELIVERY HAS TRIPLED

Road congestion in the Bay State has long been an obstacle to attracting and retaining qualified workers, and will likely return to pre-Covid levels. Pioneer’s Mary Connaughton has been a leader in the effort to ensure that planned changes to the Allston I-90 Interchange have the least impact on drivers. In 2021, Pioneer won a victory when the state Department of Transportation (MassDOT) reversed its original position and decided to move forward with an all-at-grade design for the “throat” area, as Connaughton has been recommending for two years in research, op-eds in *The Boston Globe* and regional outlets, television and radio appearances, public testimony to MassDOT, and open letters to the Governor and other top policymakers.

➤ **HELP PIONEER EDUCATE THE PUBLIC**
on this important worker freedom issue.

Make a gift today:
[PIONEERINSTITUTE.ORG/DONATIONS/](https://pioneerinstitute.org/donations/)

KEEPING A WATCHFUL EYE ON GOVERNMENT

Bay State citizens and taxpayers want a government that shares their priorities, responds to their needs, and spends their hard-earned dollars wisely. In 2021, Pioneer continued its long tradition of serving as a crucial resource to policymakers, the media, and the public; holding officials accountable for their decisions; and exposing wasteful spending and abuse of power. Whether it was welcoming Boston’s new mayor, unearthing a legislative pension giveaway, or promoting alternatives to federal loan forgiveness, Pioneer informed the conversation, with useful data and solid solutions.

Protecting the Public Trust

When the Massachusetts legislature quietly forwarded a proposal for a pension credit to “essential workers,” Pioneer swiftly responded, with a statement and a report revealing the true costs and comparing it to other states’ practices. A pension credit, unlike a one-time bonus, rewards workers based on their compensation and seniority rather than their Covid risk exposure. It also would add nearly \$2 billion in liabilities to public pension funds. The vaguely worded eligibility standards could apply to all public employees, even if they worked only one day in the office starting the week *prior* to the Covid shutdown. The report received coverage in *Forbes*, *RealClearPolicy*, *The Boston Herald*, *The Howie Carr Show*, *Bond Buyer*, and *WBUR*.

After over a decade of advocacy for reforms to public records laws, including a 2016 open letter to Governor Baker urging him to remove his office’s exemption, Secretary of State William Galvin recently filed legislation that would accomplish this. Pioneer has requested that he extend it to the legislature and the administrative operations of the judiciary.

Aided by Pioneer’s research...

- A proposed blanket pension increase for state employees who worked in-person even for only one day during the Covid shutdown has been stalled.
- Secretary of State William Galvin has filed a bill making the Governor’s Office subject to the public records law.
- A new public interest legal entity, PioneerLegal, will defend and promote school choice, economic opportunity, and accountable government through court action.
- Boston Mayor Michelle Wu received specific policy prescriptions on education reform and homelessness.
- Policy alternatives to the \$1 trillion federal student loan forgiveness proposal were publicized in *The Boston Globe*.



POLICY RECOMMENDATIONS FOR BOSTON'S NEW MAYOR

BOSTON MAYOR

Michelle Wu



Pioneer executive director Jim Stergios sent an open letter to newly elected Mayor Michelle Wu, offering to serve as a “constructive partner in generating ideas, sharing data and policy experience,” and outlining the Institute’s top priorities, with a focus on turning around the Boston Public Schools. In the

run-up to the election, Jamie Gass and Pioneer Senior Fellow Charlie Chiello published an op-ed in *Commonwealth* magazine calling attention to the school district’s deplorable condition, noting that “over 30 percent of the system’s students attend schools ranked in the bottom 10 percent statewide.” They pointed to a 2020 audit that prompted calls for state intervention, and demanded reforms to improve accountability.

“As the district continues to fail its 49,000 students and their families, there’s barely a mention of holding the system responsible for its deficiencies. It’s long past time for that to change.”

– Charlie Chiello
& Jamie Gass

CommonWealth



Chiello also appeared on *WBUR’s Radio Boston* and partnered on an op-ed with Cicero Institute’s Judge Glock, to address the controversial “Mass and Cass” homeless encampments that were growing into a humanitarian crisis. Their policy solutions included expanding access to treatment facilities for those with mental illness and drug addiction, and endorsed Mayor Wu’s decision to enforce the public camping ban.

“Leaving severely mentally ill and drug addicted people unsupervised in public places is not humane; it is a recipe for disaster.”

– Charlie Chiello
& Judge Glock

CommonWealth



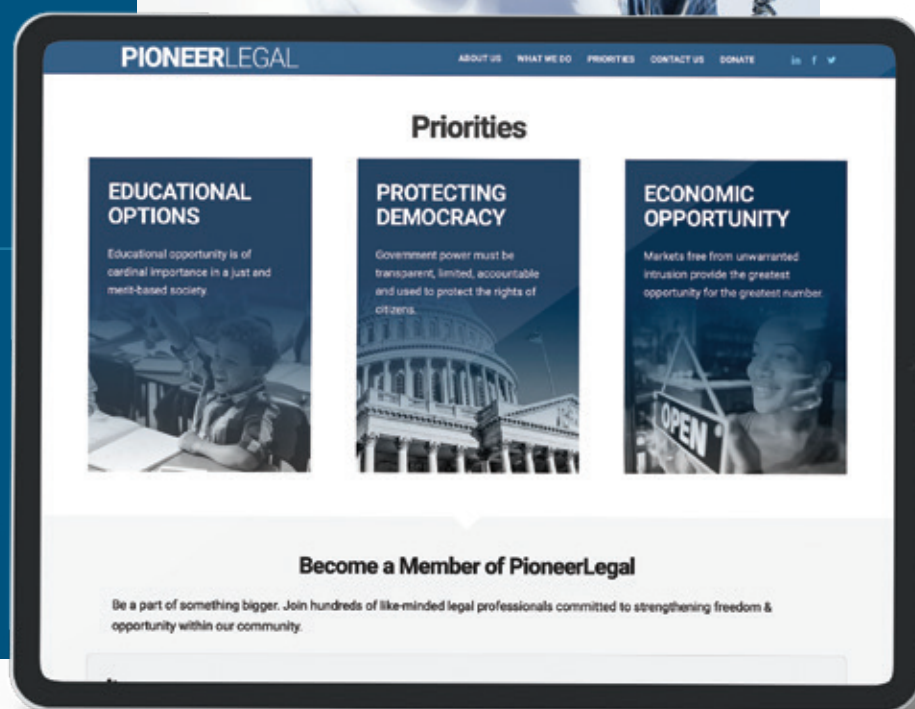
NEW

PIONEERLEGAL

In 2022, the Institute is launching a separate 501c3, PioneerLegal, New England's premier nonprofit, non-partisan, public interest law firm that defends and promotes educational options, accountable government, and economic opportunity through legal research, amicus briefs, and litigation. PioneerLegal will be a powerful addition to the policy landscape—and an innovative and attractive venue for legal professionals across the region.

**HELP US DRIVE
LASTING IMPACT**
on issues such as
school choice,
government
transparency, and
economic opportunity.

**Make a gift today:
PIONEERLEGAL.ORG/
DONATE/**



Fixing the Federal Student Loan Crisis

With the election of President Biden came increasing demands for tens of thousands of dollars in federal loan forgiveness for college graduates. Pioneer partnered with AEI on a *Boston Globe* op-ed offering more targeted solutions, including a \$5,000 tax credit, college savings accounts, and income-driven repayment programs, that would make education more accessible to low-income individuals without bailing out those with means. The op-ed pointed out that the bulk of U.S. Senator Elizabeth Warren's \$50,000 forgiveness plan would help higher-income students who hold the majority of student debt, cost American taxpayers \$1 trillion, and exacerbate higher education's inflation problem.

“Near-blanket loan forgiveness, such as the up to \$50,000 proposed by Senator Warren for households with annual incomes of less than \$250,000, is like using a blunt instrument when a scalpel can fix the problem.”

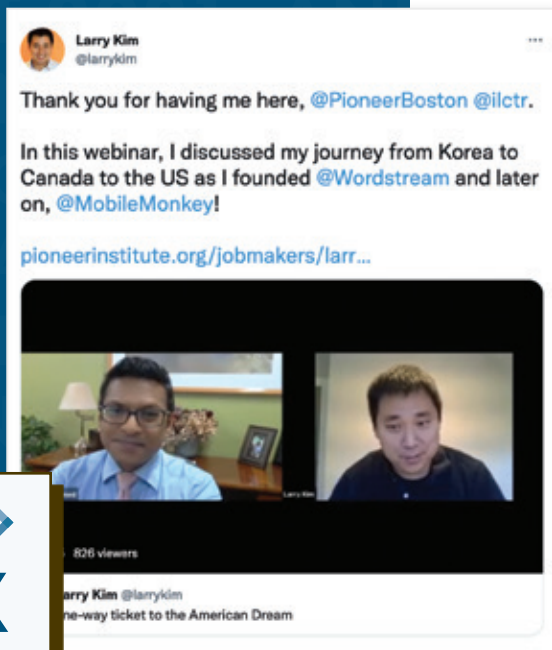
– Beth Akers (AEI) & Charles Chieppo

The Boston Globe

BUILDING A DIGITAL COMMUNITY

Pioneer understands the urgency of communicating its message to ever broader audiences to significantly and strategically boost its influence in Massachusetts and beyond, and in 2021 embarked on a bold new five-year strategic plan to grow its capacities and reach. The Institute made significant progress in expanding its social media presence, with increases in its output, following, and engagement, despite the challenges of Big Tech censorship. Pioneer content was shared by podcast guests and event speakers with large fan bases, such as author and journalist Bari Weiss, Wordstream founder Larry Kim, BBC historian Bettany Hughes, and *National Review's* Ramesh Ponnuru. Through SEO, Pioneer grew its organic traffic by 25 percent, and increased investments in paid traffic, both of which helped double owned audience acquisition. In 2022, Pioneer will support its communications efforts with new talent in digital marketing and youth outreach. The Institute is also seeking to amplify its podcast listenership, and is launching a YouTube series to build a loyal following of video viewers and subscribers.

748K
TWITTER FOLLOWERS



“Pioneer Institute voiced its opposition. They estimate the bill’s cost at “in the billions of dollars” and point to a massive boost even for a single individual, the president of the University of Massachusetts, whose lifetime pension benefit would increase by \$790,750.”

Forbes



“I think there’s concern as kids go back to school soon that they go back safely. We need to be able to track what’s going on. Not publishing Covid data is a hindrance to the public’s understanding”

– Barbara Antony



“This commonsense flexibility should remain in place permanently to ensure better patient access, and also to make sure we are ready for the next pandemic, when rotating staff may be necessary.”

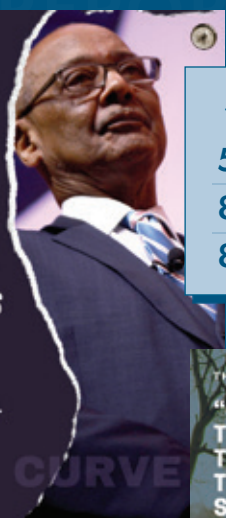
– Josh Archambault



ENGAGING SOCIAL MEDIA CONTENT

"JESSE JACKSON JR. AND FRANK SMITH, THE BLACK SUPERINTENDENT OF D.C. SCHOOLS, ALL HAD THEIR CHILDREN IN SIDWELL FRIENDS SCHOOL AND NOT IN THE PUBLIC SCHOOLS, BUT FOUGHT AGAINST GIVING LOW-INCOME BLACKS THE SAME OPTIONS THEIR INCOME ENABLED THEM TO ENJOY."


-Robert Woodson, Sr.



591 Shares
89 Comments
836 Reactions

"WE HAVE A LOT OF WORK TO DO IN EDUCATING THIS COUNTRY. WE NEED TO TEACH THE CHILDREN OF THIS COUNTRY OF DEMOCRACY, WHAT IT MEANS, AND HOW IT WORKS"

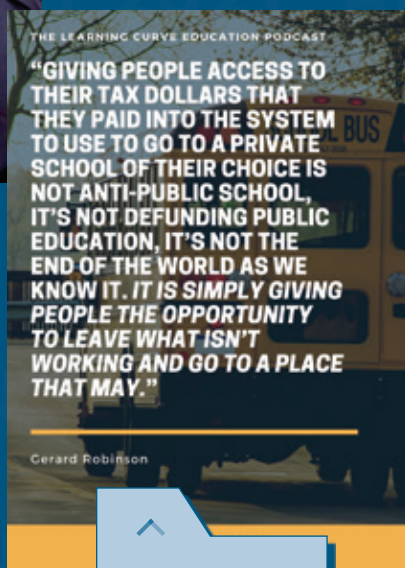
Cara Candal



281 Shares
166 Comments
847 Reactions

"GIVING PEOPLE ACCESS TO THEIR TAX DOLLARS THAT THEY PAID INTO THE SYSTEM TO USE TO GO TO A PRIVATE SCHOOL OF THEIR CHOICE IS NOT ANTI-PUBLIC SCHOOL, IT'S NOT DEFUNDING PUBLIC EDUCATION, IT'S NOT THE END OF THE WORLD AS WE KNOW IT. IT IS SIMPLY GIVING PEOPLE THE OPPORTUNITY TO LEAVE WHAT ISN'T WORKING AND GO TO A PLACE THAT MAY."

Gerard Robinson



493 Shares
68 Comments
1K Reactions



Every Wednesday, Cara Candal, Pioneer senior fellow, and Gerard Robinson, vice president for education at the Advanced Studies in Culture Foundation, discuss the prominent K-12 education issues facing the nation with school leaders, innovators, bestselling authors, policymakers, and more.

HUBWONK

Every Tuesday, host of the Hubwonk podcast Joe Selvaggi is joined by leaders in healthcare, education, transportation, and industry to explore the most pressing policy issues surrounding liberty, the free market, and human flourishing.



JobMakers

Every Thursday, Denzil Mohammed, director of the Immigrant Learning Center's Public Education Institute, explores the world of risk-taking immigrants who create new products, services, and jobs in New England and across the United States.

Significant growth in Pioneer's communications reach



WEBSITE
302 POSTS
961K PAGE VIEWS
↑ 15% growth over 2020



VIDEOS
92 POSTS
1.45M VIEWS
↑ 31% growth over 2020



SOCIAL MEDIA
7,922 POSTS
29.8M IMPRESSIONS
↑ 114% growth over 2020



EMAIL MARKETING
286 EBLASTS
65K SUBSCRIBERS
↑ 80% growth over 2020



PODCASTS
128 EPISODES
205K DOWNLOADS
↑ 73% growth over 2020



TRADITIONAL MEDIA
3,159 MENTIONS
3.05B REACH
TV, radio, online and print

CONNECTING & PROMOTING THE FREE EXCHANGE OF IDEAS

Through in-person or virtual events, Pioneer is committed to connecting with supporters, regularly and safely, to continue providing the quality content and programs that they have always enjoyed, and that have made such an important contribution to the public conversation.

THE LOVETT C. PETERS LECTURE

Rebuilding Our Institutions: Resisting Illiberalism & Unifying Americans

Bari Weiss, noted author and journalist, delivered the keynote address at Pioneer's 2021 Peters Lecture in September. She was honored for her courageous stand against "Cancel Culture," the growing, dangerous trend of silencing debate. Weiss resigned her role as an opinion editor at *The New York Times* last year, citing an "illiberal environment" in which "self-censorship has become the norm." Her 2019 book, *How to Fight Anti-Semitism*, has become an important resource at a time of escalating violence against Jewish people. Bari's focus on resisting intolerance and restoring the free and civil exchange of ideas is a goal we can all support. In promoting voices such as Bari's here in Massachusetts and nationally, Pioneer helps advance this ideal.



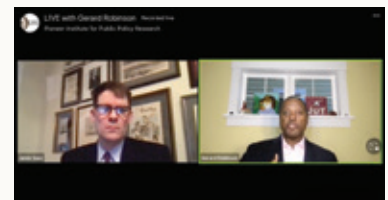
Pioneer also held an in-person member event with Harvard economist and new Pioneer board member Edward Glaeser on his new book, *Survival of the City: Living and Thriving in an Age of Isolation*, in which he and co-author David Cutler offer clear and balanced policy prescriptions to help cities weather the long-term effects of the pandemic, so they can emerge as resilient as ever.

Through networking socials, Pioneer researchers have been sharing their expertise with members of **Pioneer Young Professionals**.

Pictured right: Bari Weiss, noted author and journalist, left: Edward Glaeser, co-author of, *Survival of the City: Living and Thriving in an Age of Isolation*.



Graduated Income Tax:
A Barrier to Economic Growth



Live with Gerard Robinson



"A Vision Of Hope" Part II

VIRTUAL POLICY BRIEFINGS

In 2021, Pioneer held 12 webinars on K-12 education and race in America, the impact of the graduated income tax on Massachusetts, Catholic schools, cost-effectiveness reviews in healthcare, and much more. These were simulcast on Facebook, where they received thousands of additional views, and highlight clips reached tens of thousands more through Pioneer's social media and YouTube platforms.

DONORS 2021

Pioneer Institute is deeply grateful for the generous Board of Directors, individuals, corporate partners, and foundations who support our work and mission. The following list recognizes those donors for their support of Pioneer Institute from October 1, 2020 – September 30, 2021.

THANK YOU!

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

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IN MEMORIAM

Polly Townsend

Pioneer fondly remembers **Polly Townsend, a daughter of Pittsburgh** whose commitment to the American ideals of ordered liberty and equality of educational opportunity was forged in steel. She demonstrated this through her deep generosity and dedication to untold numbers of schoolchildren across the country, whose lives were transformed by her philanthropy. Polly was a Manchester-by-the-Sea Selectman and a director of PDM, a Pittsburgh-based steel fabrication company founded by her grandfather. She served on the board of Brookwood School and was a founding member of the Manchester Garden Club and the Friends of Manchester Trees. She was a member of the Essex County Club, the Manchester Yacht Club, the Chilton Club, the Colonial Dames, and the North Shore Garden Club. She was a devoted member of both St. John's Episcopal Church in Beverly Farms and Emmanuel Church in Manchester. Polly's allegiance to educational opportunity brought forth many new supporters to Pioneer's community, and her profound way of making each individual feel special will always be remembered.



We at Pioneer are grateful for her life and will miss her resolute spirit and friendship.

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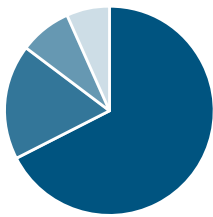
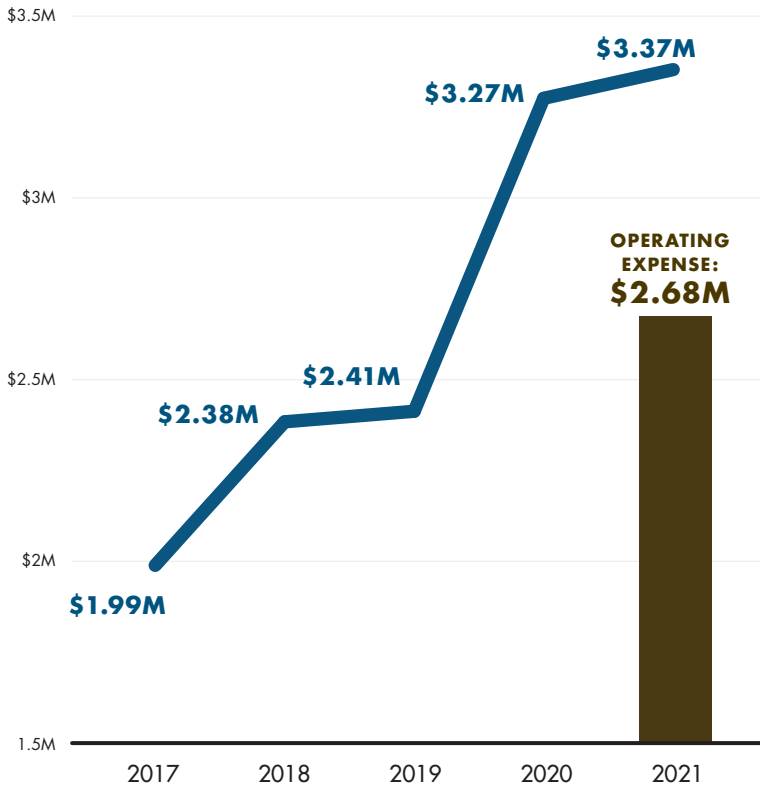
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FINANCIALS 2021

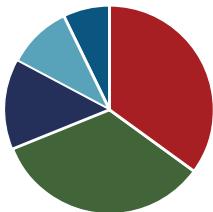
REVENUE



EXPENSES

BY CATEGORY

- Research & Programs: **68%**
- Development: **17%**
- Operations: **8%**
- General Communications: **7%**



BY RESEARCH PROGRAM AREA

- PioneerEducation: **35%**
- PioneerOpportunity: **34%**
- PioneerPublic: **14%**
- PioneerHealth: **10%**
- Peters Lecture: **7%**

YEAR ENDED 9/30/21

REVENUES & EXPENSES

REVENUE	
Unrestricted Donations	\$1,757,542
In-Kind Donations	134,289
Restricted Donations	1,445,250
Other Revenue	33,641
TOTAL REVENUE	3,370,722

EXPENSES	
Employment Costs	1,436,332
Outside Services	261,765
Research	346,802
Printing & Publishing	44,305
Distribution Costs	274,145
Events & Meetings	129,348
Staff Business Expenses	25,586
Office Operations	114,821
TOTAL EXPENSES	2,633,104

Other Income	599,849
Other Expenses	42,229

INCREASE IN NET ASSETS	\$1,295,238
-------------------------------	--------------------

9/30/21

FINANCIAL POSITION

ASSETS	
Cash	\$1,541,585
Contributions Receivable	207,247
Investments	3,426,497
Property & Equipment	803,378
Other Assets	7,124
TOTAL ASSETS	\$5,985,831

LIABILITIES & NET ASSETS	
Accounts Payable & Other Accrued Expenses	\$123,281
TOTAL LIABILITIES	123,281

NET ASSETS	
Without Donor Restrictions	4,154,298
With Donor Restrictions	1,708,252
Total Net Assets	5,862,550

TOTAL LIABILITIES & NET ASSETS	\$5,985,831
-------------------------------------------	--------------------

See audited financial statements available at
PIONEERINSTITUTE.ORG

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Mary Z. Connaughton
Chief Operating Officer

Micaela Dawson
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