TRUE NORTH

30 YEARS OF PIONEER INSTITUTE

"Ideas have consequences and great ideas have great consequences, but they sure take time and well-directed effort to succeed."

- Lovett C. "Pete" Peters





Affordable & High-Quality Healthcare



Efficient & Transparent Government

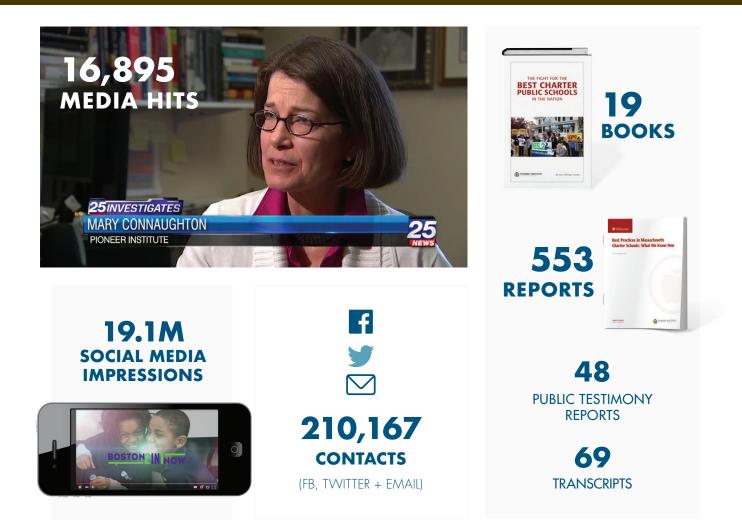


Business Innovation & Job Growth



30 YEARS OF COMMON SENSE & UNCOMMON RESULTS

Pioneer Institute uses academic-level research and professional marketing strategies to improve the quality of public debate and advance innovation and reforms in the four issue areas - education, health, efficient government and economic opportunity - that will determine the quality of civic life and prosperity in our society.



BOARD OF DIRECTORS

Steven Akin Nancy Anthony David Boit Brian C. Broderick Gary Campbell Frederic Clifford Andrew Davis

Brackett Denniston Stephen Fantone Ellen Roy Herzfelder Charles C. Hewitt III Lucile Hicks Alfred Houston Keith Hylton

C. Bruce Johnstone Mary Myers Kauppila Gary Kearney Pamela Layton Nicole Manseau M. Holt Massey Adam Portnoy

Mark V. Rickabaugh Eileen Shapiro Peter Wilde

Chairpersons Emeriti Diane Schmalensee William B. Tyler

Our principles are Pete'sfrugality, hard work, independence, and a willingness to say what

needs to be said, even when it is unpopular. We bring Pete's indomitable spirit to our work, through persistence and entrepreneurship. In 2018, Pioneer Institute is stronger than ever. With the national civic arena hampered by partisan rhetoric and deep divisions between political parties, our data-driven approach to policy development and energetic media marketing is critical in these times.

2018 MARKS PIONEER INSTITUTE'S 30TH ANNIVERSARY.

Without our founder, Pete Peters, and his great vision, Pioneer would not exist. But Pioneer is just one part of his successful life dedicated to

family, business, and the country and Commonwealth he so deeply loved.

The Institute's accomplishments have benefited tens of thousands of children, Massachusetts' many businesses, and the quality of its governance. We have more work to do-much more. But, as Pete used to say, "This is the work at hand."

TRUE NORTH PIONFER AT 30

We are pleased to celebrate this occasion with you, and to formally recognize Pioneer's successful launch of the Peters Legacy Society and Pioneering Massachusetts' Tomorrow initiatives. These campaigns will further build Pioneer's long-



Lovett C. "Pete" Peters

term capacity by growing our network of supporters, attracting new talent, and promoting Massachusetts as a state committed to policies that increase education and economic opportunity for all.

This volume includes a handful of tributes from Pioneer's Board of Directors and long-time supporters. Please enjoy the photographs and testimonials as a token of our appreciation. Thank you for taking part in this celebration as we honor Pete and 30 years of

putting ideas into action to improve the lives of Massachusetts residents.

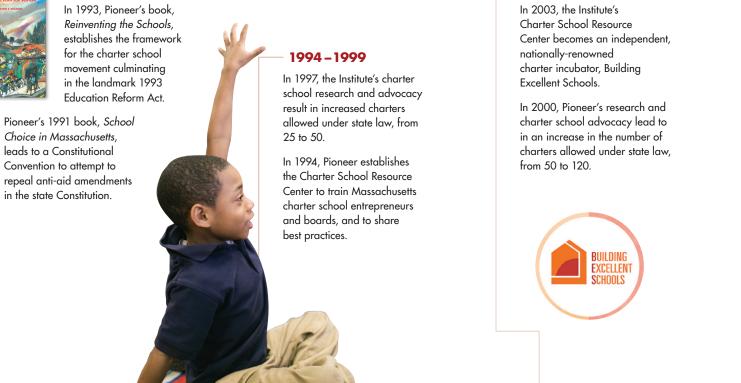
This milestone would not be possible without your incredible friendship and support.

Thank you.

Jim Stergios, Executive Director

2000 - 2005

EXCELLENT SCHOOL CHOICES FOR FAMILIES



2012 - 2017

In 2016 and 2017, Pioneer's charter school videos and social media campaign result in dramatic increases in charter applications in Boston and Lawrence.

Pioneer research and marketing efforts prompt a \$50M investment in VTE.

In 2012, after a Pioneer advocacy campaign, the state approves four new high-quality charters, including a SABIS charter school in Lowell to serve approximately 1,200 students.

2008

2009

2006-2011

The Institute's reports and media efforts highlight the success of Massachusetts' vocational-technical education (VTE), prompting the creation of a state deputy commissioner for vocational education.

Pioneer contributes to the 2010 effort to lift the cap on charter public schools, ensuring access to high-quality educational options for an additional 15.000 students.



1988 1989

HIGH-QUALITY LIBERAL ARTS CURRICULUM

1988-1993

1988-1993

Pioneer academic advisor and author co-edits The American Reader (1991) and The Democracy Reader (1992), promoting K-12 schooling in the basics of history and citizenship.

American Reader

1994-1999

The Institute's executive director and the state board of education chair develop the nation's highest-quality K-12 academic standards grounded in math, English, science, and U.S. history.

1997

1000

Pioneer's research supports the state's establishment of the MTEL teacher certification test, which focuses on mastery of academic content.

The Institute's book, Bilingual Education in Massachusetts, makes recommendations that serve as the basis for a later (successful) 2002 statewide referendum

Pioneer's report, Special Education: Good Intentions Gone Awry, recommends reforms that are incorporated into state law in 2000.

2000 - 2005

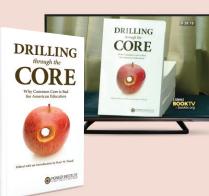
2003

Pioneer's executive director and the state Board of Education chair design and lead the Commonwealth's independent school district accountability agency, which is cited as a national model by media and the state supreme court.

2012-2017

2004

From 2010 to 2017, the Institute leads the national opposition to the Common Core educational standards, publishing more than 20 reports and a book entitled Drilling through the Core: Why Common Core is Bad for American Education, and offers testimony in 33 states.



30 YEARS OF PIONEER

The Institute's 2008 Better Government Competition (BGC) winner, Florida Virtual School founder Julie Young, is ranked among the most influential figures in American K-12 education history. Pioneer's related reports, events, and outreach result in the 2012 Act Establishing Commonwealth Virtual Schools.

2018

Pioneer's research on the METCO program leads to a \$2.5M increase in the program's 2019 funding.

The Institute's school choice and religious freedom documentary film, Big Sacrifices, Big Dreams, is viewed 1.1M times, in addition to 500,000 trailer views.



- Pioneer garners hundreds of national media hits, many from top education commentators.
- By 2018, Common Core-aligned national tests are in place in fewer than one-fourth of original member states.
- In 2017 and 2018, Massachusetts revamps all curricular standards and rejects participation in the Common Core-aligned testing consortium, choosing an improved version of the Massachusetts Comprehensive Assessment System (MCAS).
- Pioneer research, events, and outreach lead the Special Commission on Civics Education to issue a report supporting U.S. history and civics instruction and testing in Massachusetts

After several years of Pioneer advocacy for teaching and testing history and civics in public schools, Governor Baker signs new legislation on civic engagement for students.



EFFECTIVE PUBLIC PROGRAMS

1988-1993

A 1994 BGC-winning proposal leads to reforms of the state's child support system.

A 1993 BGC proposal to establish nursemanaged health clinics that improve care and reduce costs is replicated across the country, with more than 300 clinics now serving 2.5M patients.

2012-2017

Pioneer's 2014 report on the state's failed launch of an Affordable Care Act-compliant website and its exorbitant development cost overruns prompts an investigation by the state Auditor.

Pioneer's reports on the multi-billion dollar local impact of Affordable Care Act-related taxes are the basis for congressional reconsideration.

The Institute's recommendations to reform the state's beleaguered Department of Children & Families are included in the overhaul of the agency's intake practices.

Medicaid and Medicare services for elderly populations.

The Institute successfully advocates for a pilot program at the Group Insurance Commission using financial incentives to steer 93,000 public employees toward high-quality, low-cost settings.

Pioneer suggests reforms at Bridgewater State Hospital, including sweeping changes to the hospital's governance, interdepartmental information-sharing, treatment operations, and accountability, which are incorporated in the Baker administration's reforms.



Implementation improves care for 110,000 residents and saves the state millions of dollars.

1988

2000-2005

Pioneer's report, Rationalizing Health and Human Services, leads to a 2004 structural reorganization of statewide administrative services saving \$90M.



2006-2011

A winning BGC proposal suggesting the state Group Insurance Commission provide local teachers and other employees with better care and lower cost health insurance leads to reforms that save municipalities more than \$100M annually.

The Institute's studies and media work on the looming cost of retired public employee healthcare benefits prompts the creation of an irrevocable fund in 2007.



A 2009 BGC-winning entry proposes cost-effective, community-based procedures to provide care for elders with disabilities. Today, 3,000 Massachusetts elders benefit from the model, saving \$90M annually.

2012-2017 (CONTINUED)

In 2017, the Governor's proposal to assess small businesses fines for not insuring a minimum of 85 percent of employees is dropped following criticism from Pioneer and business groups.



The Institute publishes The Great Experiment, a book reexamining state and federal roles in healthcare reform. The national release garners media nationwide and a congressional briefing draws over 100 key staff members.

PRICE TRANSPARENCY & INNOVATION

2012-2017

State lawmakers include suggestions from the Institute's report Innovative Medical Liability Reform in a payment reform bill.

Pioneer issues a report and collaborates with business groups to compel the state to broaden access to convenient care clinics.

The final report of the state legislature's Price Variation Commission incorporates the Institute's recommended cost transparency reforms.

After the Institute's criticism of a gubernatorial proposal to regulate contracts between health insurers and providers, the proposal is abandoned.

Pioneer's study highlighting the benefits of telemedicine prompts the state Senate to include provisions promoting telemedicine in healthcare cost control legislation.

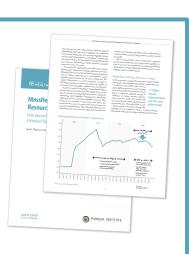


The Institute's report, Baker's Dozen: A lower healthcare costs.

30 YEARS OF PIONEER

2018

Pioneer's investigation of MassHealth's broken eligibility system leads to an FBI inquiry. The Institute's promotion of reforms related to eligibility and fraud review saves the Commonwealth over \$250M annually.



2018

2018

Pioneer's 2015 and 2018 studies of health sector cost inflation prompt the legislature to reject attempts to impose price controls on the pharmaceutical industry.

Pioneer's multi-year effort to advance healthcare price transparency leads to broader access to insurance claims data from the state's Center for Health Information and Analysis, enhancing public knowledge of health system costs.

Pioneer's life sciences work sparks industry conversations about pricing models for orphan treatments, which would broaden access to new therapies and protect company incentives to innovate.

Common Sense Healthcare Agenda for the Next Governor, calls for changes to "scope of practice" rules, **leading** to regulatory reforms that help



EFFECTIVE, EFFICIENT GOVERNMENT

1988-1993

Partial implementation of a 1992 winning BGC entry to reduce plant size by using alternative chemical technologies saves Massachusetts Water Resources Authority ratepayers at least \$100M for the Boston Harbor cleanup project.

Pioneer research and outreach leads to reforms of the state's fleet management system.

A proposal from the 1991 BGC to privatize pharmacies in three state agencies is adopted and later expanded to 22 Department of Corrections facilities.

In 1991, the Institute establishes the Better Government Competition, a crowdsourcing effort to identify and bring the best policy ideas and programs to Massachusetts.



2006 - 2011

Pioneer research influences reforms to address state pension abuse and eligibility, saving the Commonwealth hundreds of millions of dollars annually.

Following the Institute's calls for the abolition of mandatory police details in favor of less costly civilian flaggers, Governor Patrick curbs the use of certain police details.

Pioneer reports and media efforts regarding Massachusetts' locally managed pension systems lead policymakers to invest the funds of 30 local systems in the state's Pension Reserve Investment Trust, generating tens of millions of dollars in additional returns.

The Institute's research generates key reforms to support the Springfield Finance Control Board, saving money and improving service quality.

1998



The Institute's media campaign



The 2000 BGC runner-up calls for revamping the School Building Assistance Program and in 2010 the legislature passes "Chapter 70B" reforms, which include key aspects of the entry.

2012-2017

Amidst UMass tuition and fee hikes and a request for increased state appropriations in 2017, Pioneer's three-part series, UMass at a Crossroads, leads the Baker administration to require Governor's office approval for significant UMass capital projects.

In 2015, the Institute forms a public interest legal arm, *PioneerLegal*.

In 2014, Pioneer uncovers a \$110M subsidy to a developer buried in legislation to expand the Boston Convention & Exhibition Center. Negative publicity pressures legislators to drop the subsidy.

The 2015 BGC-winning proposal, which established a charter school in a San Francisco correctional facility, is adapted for a Roslindale prison by the Baker administration.

2011

PROMOTING STATE & LOCAL GOVERNMENT TRANSPARENCY

1994 - 1999

1990

1989

1988

The 1998 BGC winner calling to improve the administration of civil justice in district and superior courts leads to enactment of model Economic Litigation Agreements for commercial contracts and reduces civil litigation costs.

1992

1993

1994

1995

The 1996 BGC runner-up, "Operation Night Light," calls for pairing probation and police officers to make unannounced night visits to high-risk probationers. It remains in operation in six Boston district courts and has been credited with saving more than 2,000 lives.

A winning proposal from the 1995 BGC to competitively contract highway maintenance saves Massachusetts taxpayers upwards of \$40 million.

Pioneer's research and media efforts on the proposed South Boston Convention Center lead to improvements in the project's finance plan.

2006-2011

2007

2008

2009

2006

In 2011, Pioneer is the first organization to offer a free online tool giving the public access to the Commonwealth's vendor, payroll, and pension payments. Additionally, the Institute and its allies advise the state Treasurer on the creation of OpenCheckbook.com (now, the "C-Thru" platform).

In 2011, Pioneer develops Munishare.org, a website where municipalities share best practices in local government.

In 2009, Pioneer develops MassCityStats.org, a website that compares municipal performance in the state's "Middle Cities."

2012-2017

Pioneer creates an online tool comparing MBTA performance to other U.S. transit agencies.

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Ob plans and funding are not stress tested and there are very instead facul reserves to mast the next accounts' revenien.	A Dariye's Sweet
(Velp in Press Mil. Same Permisers)	In "The Bay State's Public Pension Complex Costly and Unaccountable," Dr. Ilga Atanasov finds that the 102 local systems (H4 municipal, 12 regional, and 6 "pecial" systems

Pioneer brings unprecedented transparency and accountability to state and local pension systems' investment performance and fiscal solvency through an online rating tool, MassPensions.org.

30 YEARS OF PIONEER

Through a sustained media campaign, research publications, and meetings with policymakers, Pioneer helps prevent a \$1.9 billion state income tax increase.

In 2012, the Institute sends a municipal finance guidebook to 4,000 local officials across Massachusetts, together with an online tool to facilitate benchmarking.

Through Pioneer's Middle Cities Initiative trainings in concert with Harvard University and UMass, numerous New England cities implement data-driven municipal management.



2018

Pioneer ignites the debate on whether the UMass Amherst campus should continue accepting out-of-state students with lower academic credentials than in-state students.

The U.S. Supreme Court ruling in the Janus v. AFSCME case is consistent with the Institute's two amicus briefs.

Pioneer research thwarts public union efforts to intimidate employees through proposed post-*Janus* legislation.

The state's Supreme Judicial Court (SJC) ruled the "Fair Share Amendment" (or "Millionaire's Tax") unconstitutional, a decision in line with Pioneer's arguments in several reports and an amicus brief filed with the SJC.



2014

2015

2016

2012

2018

Pioneer develops MassAnalysis.org, a web tool primarily for local officials to benchmark their municipalities' financial performance

MassAnalysis Benchmark Your Community		PONER NOTUTE 0000	
Ø Marinese	1 Anna Tablic In Table New York and		

with peer communities. By 2018, the site experiences four-fold user base growth.

The Institute works with allied groups on public records reform legislation that establishes a special legislative Commission on Public Records to increase transparency in the State House.

Pioneer opinion pieces pave the way for the State Ethics Commission to develop an online portal improving public accessibility to Statements of Financial Interest of legislators and policymakers.

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WORK & SOCIAL MOBILITY

1988-1993

Many new approaches outlined in Pioneer's book. Work and Welfare in Massachusetts, are included in Governor Weld's welfare reform legislation and serve as a model for subsequent federal reforms.

1994-1999

1994

A winning 1994 BGC proposal to require that single mothers provide paternity information to qualify for state benefits is included in the Commonwealth's sweeping welfare reform law.

A winning proposal from the 1995 BGC recommends an electronic benefits transfer system, which is now the industry standard for public assistance programs.



2006 - 2011

In 2012, the Institute recommends a slate of reforms to revitalize Massachusetts' older industrialized cities, resulting in the creation of a position to coordinate state grants to these cities.

Through research and media campaigns conducted with allied business organizations, Pioneer works to implement a legislative freeze on unemployment insurance premiums from 2009 to 2013, saving Massachusetts businesses \$600M annually.



TRANSPORTATION & HOUSING

1998



The 1991 BGC winner proposes a "forward funding" system at the MBTA, requiring the agency to operate within the constraints of a finite revenue stream and the idea is implemented in 2001.

2000 - 2005

2006 - 2011

The Institute informs the policy conversation related to investments in the maintenance and repair of public infrastructure and works with the Patrick administration to develop the Accelerated Bridge Program.

Reforms proposed in a Pioneer study emphasizing market-rate housing in the state's affordable housing programs are incorporated into the 2007 Housing Bond Bill.



2012-2017

The MBTA leverages its exemption from the Commonwealth's archaic antiprivatization "Pacheco Law" to renegotiate its contract with the Carmen's Union and save hundreds of millions of dollars.

Together with partners, Pioneer successfully advocates for the establishment of the T's Automated Fare Collection system.

Pioneer works with WBZ's I-Team to expose and put an end to a perk that allowed certain MBTA employees to take home unmarked vehicles owned by T contractors.

After years of Pioneer reports and advocacy, the legislature moves the MBTA's pension assets to the state's Public Retirement Investment Trust.

The Institute's research, testimony, and media efforts help secure passage of a transparency law compelling the MBTA Retirement Fund to make its financial reports publicly available.

The state legislature adopts Pioneer's recommendation to create a Fiscal and Management Control Board to oversee MBTA operations, finances, and management, and suspends the anti-privatization "Pacheco Law," allowing the T to save money and improve service quality.

State transportation officials abandon a proposed a gas tax hike after the Institute highlights differential impacts and calls on MassDOT to adopt performance metrics to help citizens understand where their fare and tax dollars will be spent.



From 2015 to 2017, Pioneer produces analyses and advocates for numerous MBTA reforms that are implemented, including outsourcing money collection, warehousing of parts, and customer service, as well as The Ride's use of cost-efficient, customerfriendly options (Uber, Lyft and private taxi).



1988

30 YEARS OF PIONEER

2018	2017	2016	2015

2018

Eleven years after Pioneer's report on the Longfellow Bridge called attention to much-



needed upkeep, bridge repair is completed

Pioneer's push to competitively contract the MBTA's bus maintenance provides leverage in negotiations with the Machinists Union, resulting in millions of dollars in cost savings and the establishment of performance metrics.

Following the Institute's recommendation, the MBTA establishes weekend discounts and variable rates at T parking lots to increase commuter rail ridership.

> **Pioneer research** advocating for the modernization of the taxicab industry informs state regulators on the efficiencies of the ridesharing industry and helps new entrepreneurs in the transportation market.

Pioneer research on MBTA ferry service sparks public and private industry conversations about expanding water transportation.





The Peters Legacy Society

The Institute's planned giving program builds on the legacy of impact that our founder, Pete Peters, began in 1988. In recent years, a number of our donors have made bequests to Pioneer to ensure that the Institute has the resources to continue its mission well into the future.



" Barbara and I are pleased to become members of the Peters Legacy Society. We have had a long engagement with Pioneer Institute through our good friend, my one-time boss, and committed past Pioneer Chairman, Colby Hewitt. I was honored to be invited to join Pioneer's Board and am likewise committed to Pioneer's vision and mission to improve government efficiency, healthcare, and education for our citizens. I look forward to playing a part in shepherding this vision for the great state of Massachusetts for many years to come."

FREDERIC & BARBARA CLIFFORD



ALFRED & PATRICIA HOUSTON



C. BRUCE & HOLLY

JOHNSTONE

"We're a public policy think tank that helps to make Massachusetts the best place to locate and live in these United States. I sometimes close Pioneer events noting that if you like what you've heard and feel inspired, don't hold back ... Everybody in this room not only benefits from our hard work, but can add to our influence... Tonight my wife Holly and I would like to announce that we are going to match Kingman Webster's gift with a legacy gift of our own so that Pioneer can continue to expand its presence in so many important arenas."

- C. Bruce Johnstone, Vice-Chair, 2016 Lovett C. Peters Lecture in Public Policy



GARY & SUSAN **KEARNEY**

to come."

our state."



- Diane Schmalensee, Chairperson Emerita



DIANE & RICHARD

SCHMALENSEE

PETER & SALLY WILDE

- Peter Wilde, Board of Directors

"I started Pioneer Institute to change the intellectual climate in Massachusetts. Anthony Fisher once noted that, when he asked F.A. Hayek's advice about going into politics, that great political philosopher told him he would be wasting his time — there was no use trying to change Parliament until you first changed the people's minds. Mulling that advice, I realized there could never be change on Beacon Hill unless the people of Massachusetts first accepted free markets as a viable alternative to big government. That is why I started Pioneer: to bring Massachusetts a voice for a strong

free market, individual liberty and responsibility,

and smaller government."

- Pete Peters



Frederic & Barbara Clifford Alfred & Patricia Houston C. Bruce & Holly Johnstone

Gary & Susan Kearney Stephen Mead Diane & Richard Schmalensee Frederick Thorne Kingman & Dee Webster Peter & Sally Wilde



30 YEARS OF PIONEER

TESTIMONIALS

- Frederic Clifford, Board of Directors

" Pat and I are excited about joining the Peters Legacy Society by including Pioneer Institute in our will. Since the time I met Pete Peters serving on the Board of Nichols College, Pioneer's influence has continued to grow in education, better government, transportation, market-based analysis, and healthcare reform. We are happy to provide Pioneer with the resources it needs to continue that growth into the future, and urge others to join us."

- Alfred Houston, Board of Directors

"We are proud to join the Peters Legacy Society. From our first encounter with Pete Peters in the 1970's to when Governor Charlie Baker served as the Institute's first co-Executive Director, we became more and more committed to Pioneer's vision for educational opportunity, a lean and effective government, and market-based approaches to real healthcare reform. We believe Pioneer is well-positioned to continue to do great work for the people of Massachusetts for years

- Dr. Gary Kearney, Board of Directors

" Richard and I have been involved with Pioneer for nearly 30 years, first as friends and admirers of its founder Pete Peters and then as active supporters. In that time, we have seen Pioneer grow in stature and impact while remaining true to its founding vision of improving the schools, healthcare, economic opportunities, and government operations of Massachusetts. We are confident that our donation to the Peters Legacy Society is an ideal way to invest in the future of

' Sally and I decided that we wanted our resources put to work on improving our state in a fiscally responsible way. In today's world, when there is so much need for the promotion of ideas based upon fact, Pioneer Institute is a worthy investment. That is why we have proudly contributed to the Peters Legacy Society. After meeting Pete Peters in the early 1970's when we first moved to Chestnut Hill, it is a great feeling for us to be able to ensure that his legacy and vision will be carried on today and for many more years to come."

30 YEARS OF PIONEER PIONEERING MASSACHUSETTS' TOMORROW

JANE & STEVEN AKIN "The Jane & Steven Akin Digital Media Initiative capitalizes on a unique moment for Pioneer. The Institute has established itself as a trusted, go-to source for public policy insight and commentary in the region's traditional news outlets. However, print media, radio, and television are at a crossroads. Today, individuals are consuming their information from a diverse array of distribution options in a digitized marketplace of ideas. This initiative will open new doors for Pioneer by engaging untapped audiences, leveraging new social media technologies, and marketing its research and programs to the public in a streamlined and accessible format of the user's preference. Fact-based, researched, and reviewed thinking is fundamental to informed citizens making good, effective decisions. We are honored to be a part of the Pioneering Massachusetts' Tomorrow campaign to ensure the Institute's communications efforts coalesce with the changing media landscape."

- Steven Akin, Board of Directors



" Roger and I are proud to make this commitment in support of PioneerOpportunity. Time and again, the Institute has delivered non-partisan, data-driven policy solutions, especially when it comes to boosting Massachusetts' role as a national leader in constructive workforce development reforms. We are confident this gift will spur positive changes to the benefit of all Bay State citizens today, tomorrow, and far into the future."

- Kristin Servison, former Board of Directors

KRISTIN & ROGER SERVISON

" If to please the people, we offer what we ourselves disapprove, how can we afterwards defend our work? Let us raise a standard to which the wise and honest can repair; the event is in the hand of God."

- George Washington, then-President of the Constitutional Convention of 1787, advising his fellow Delegates

In the coming years, we have unique opportunities to advance real change in our core areas of expertise – education, healthcare, government efficiency, and economic growth. The following individuals have generously offered to support our efforts through program-based, multi-year operating gifts.



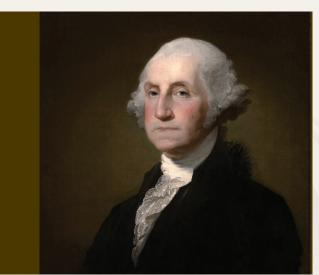
FOUNDING MEMBERS

Jane & Steven Akin Mary Myers Kauppila & George Myers Mark & Lynne Rickabaugh

Kristin & Roger Servison William & Anngennette Tyler

30 YEARS OF PIONEER

TESTIMONIALS



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PIONEER INSTITUTE

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