

PIONEER INSTITUTE  
FOR PUBLIC POLICY RESEARCH

*Annual Report 2005*



# Letter from the Founding Chairman and Executive Director

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**D**EAR FRIENDS,  
Before recounting Pioneer's progress during 2005, we would be remiss if we didn't first acknowledge a great personal loss. Colby Hewitt—our Chairman, and our friend—passed away in August of last year. We dedicate our efforts, in 2006 and beyond, to sustaining Colby's legacy and remaining true to his values.

Since its founding in 1988, Pioneer has been consistent in its principles, in its support for research of the highest quality, and in its outreach efforts. Through policy research, forums, media campaigns, competitions, and coalition-building, Pioneer has succeeded in building a brand and significantly reshaping the intellectual and political climate in Massachusetts.

We continue to build on areas of known Pioneer expertise:

**Education Reform.** Pioneer has been instrumental in revising expectations for Massachusetts public schools. Our research this year has evaluated existing reforms, and also suggested how future efforts should proceed. Our public opinion studies have demonstrated that there is broad support for expanded school choice and voucher programs. Pioneer's forums presented both the lessons of San Diego's comprehensive reform program to a Massachusetts audience. We will continue to look beyond our borders, and emphasize the urgency of educational progress in a global economy.

**Effective Government.** Pioneer continued to advance reform in the area of transportation, through research on the service and fiscal benefits of privatizing the Massachusetts Turnpike. In June, we held another successful Better Government Competition. The competition has saved hundreds of millions of your tax dollars since it began in 1992. Importantly, it encourages citizens to think about how to improve our government. The BGC has been replicated in numerous other states.

**Urban Business Development.** The Center for Urban Entrepreneurship continues to advance the Urban Business Alliance, which partners leading financial institutions with inner-city entrepreneurs. In addition, CUE publishes guides for entrepreneurs and holds productive meetings for policymakers, building professionals, business consultants, and entrepreneurs.

**Housing.** Pioneer has nearly brought to completion its 18-month project of building a database of the restrictions on housing in 187 Eastern and Central Massachusetts communities.

**Healthcare.** This past year, we've advanced initiatives related to improving the functioning of the health care market, releasing a study comparing quality and cost of care in Massachusetts teaching and community-based hospitals.

As Pioneer faces its first year without Colby Hewitt, we are confident that our accomplishments are a fitting tribute to his life, and his principles. With the support of partners like you, Pioneer will continue to put the core values of an open society—personal freedom and responsibility, the role of the market, and limited and accountable government—into timely, purposeful action for Massachusetts.



Lovett C. Peters  
Founding Chairman



James Stergios  
Executive Director

January 3, 2005  
**Boston Globe**  
**Judges Begin Push for a Raise**  
by Frank Phillips

Coverage of the Pioneer study by former district court judge James Dolan, who found that lawmakers had created 382 positions the judiciary never sought, costing taxpayers \$48.3 million.

January 9, 2005  
**Boston Globe**  
**Making Sense of School Choice**  
by Mary Lord

Coverage of the choices parents have in their children's education featuring a quote by Stephen J. Adams, former president of the Pioneer Institute.

## In The News in 2005

## Preeminence in Peril: Bolstering Science and Math Education

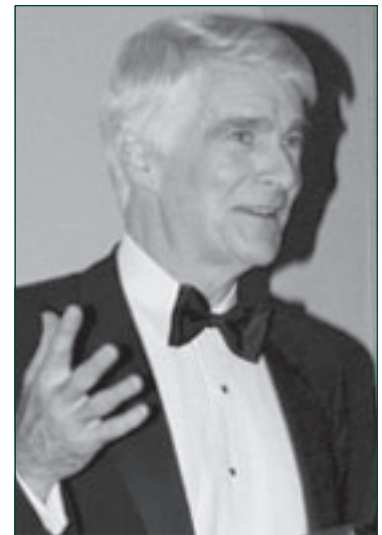
by Robert Herbold

December 1, 2004

The 2004 Peters Lecture focused on the disturbing gap in the number of science, technology, engineering, and mathematics graduates the United States turns out compared to other nations. Robert (Bob) Herbold, a retired Microsoft official and chair of the Workforce/Education Subcommittee of the President's Council of Advisors on Science and Technology (PCAST), argued that this situation threatens our nation's position as the world's industrial leader. Referring to a recent report by the PCAST subcommittee he chairs, Herbold called for immediate action to strengthen science and math education in our schools—including instituting merit and differential pay for teachers in these subjects.

As Executive Vice President and Chief Operating Officer at Microsoft Corporation from 1994 to 2001, Bob Herbold managed all operational aspects of the software giant during its rapid growth. He previously was Senior Vice President at Procter & Gamble, where he spent 26 years. Now managing director of his own business, Mr. Herbold is the author of a newly published book, *The Fiefdom Syndrome: The Turf Battles That Undermine Careers and Companies And How to Overcome Them*.

## Lovett C. Peters Lecture



December 17, 2004

### **Boston Business Journal** **Why Great Teachers Should Make \$150K**

**Q:** What are other countries that are successful teaching math and science doing that we're not doing?

**A:** The driver is an intense desire to be successful in these areas. One could almost claim that we have been so successful that we are somewhat taking our eye off the ball, and other countries are beginning to realize, "Wow, if we train students the proper way and train enough of them and get a critical mass, we could potentially take over that leadership role."

In the United States, 5 percent of those getting bachelor's degrees are in engineering, and in China, 38 percent are in engineering. Why that big difference? That country is really keenly aware that the core of

industry is technology, and their secret sauce is going to be the fact that they're going to excel in that.

**Q:** When do we start to see a difference in math and science education levels?

**A:** It is basically right at the beginning of primary education. By the time the student is in the eighth grade in China, they are very excited about these areas. The reason is they have been given messages by their teachers that these are important areas. Secondly, they have been given messages by the press that these are companies being managed by very young people with great technical backgrounds.

## In The News in 2005

January 24, 2005

**Boston Globe**

**Why Massachusetts Has the Blues**

by Stephen Adams

Opinion editorial discusses that while the big-government faction is not going away any time soon, there are clear signs that liberty may be making headway here in the Commonwealth.

March 20, 2005

**Lowell Sun**

**Government's eminent domain powers must be limited**

by Stephen Adams

Opinion editorial discusses why government land takings for economic development are a terrible idea.

**In The News in 2005**

## Educational Excellence

*In 2005, Pioneer continued its commitment to promoting educational excellence in Massachusetts by issuing several research papers and hosting events focused on education. The efforts described below promote competition in the public schools, ensuring equality and academic excellence for all students.*

### **Preeminence in Peril: Bolstering Science and Math Education**

*January 2005*

Edited transcript of 2004 Lovett C. Peters Lecture in Public Policy, by Robert Herbold, on serious shortcomings in American math and science education and the need for bold measures. Robert (Bob) Herbold, a retired Microsoft official and chair of the Workforce/Education Subcommittee of the President's Council of Advisors on Science and Technology (PCAST), argued the situation threatens our nation's position as the world's industrial leader. Herbold's speech focused on the disturbing gap in the number of science, technology, engineering, and mathematics graduates the United States produces compared to other nations. Referring to a recent report by the PCAST subcommittee he chairs, Herbold called for immediate action to strengthen science and math education in our schools—including instituting merit and differential pay for teachers in these subjects.

### **Rescuing Students in Chronically Underperforming Schools: Pioneer Forum**

*March 30, 2005*

As a complement to Peters Paper #2, entitled "Rescuing 16,101 Drowning Students," Pioneer Institute brought Harvard education scholar Paul E. Peterson to a standing-room-only Pioneer Forum. Dr. Peterson outlined his ideas of what might be done to rescue the 16,101 students in 25 Massachusetts schools that have failed to make "adequate yearly progress" in any of the last six years. The event featured panelists: James Peyser, Chairman of the Massachusetts Board of Education; Michael Contompassis, Chief Operating Officer, Boston Public Schools; and Richard Stutman, President of the Boston Teachers Union. In May 2005, Pioneer published a summary of the forum, including Dr. Peterson's remarks.

**Boston Business Journal**  
**Why Great Teachers Should Make \$150,000**

Robert Herbold is sounding a sobering message about the United States' educational complacency. Herbold, who was CEO at Microsoft from 1994 to 2001, chaired the President's Council of Advisors on Science and Technology, which issued a report in June filled with disturbing findings.

February 13, 2005

**Boston Globe**  
**Ex-CEO Eyes Stronger K-12 Education**

Coverage of Robert Herbold's philosophy that by improving K-12 education, the United States will maintain its position as a hotbed of innovation.

**In The News in 2005**

## **Massachusetts Collaboratives: Making the Most of Education Dollars**

By M. Craig Stanely Ed. D.

*June 2005*

Study finding that making greater use of educational service agencies (ESAs), also known as educational collaboratives—regional associations of individual school districts—can produce substantial cost savings for Massachusetts districts at a time when many of them are grappling with declining funding. By assuming many of the routine support functions required to run a public education system, educational service agencies free up the Commonwealth's Department of Education to provide leadership, and Massachusetts school districts to provide quality student instruction.

## **Urban School Reform: Pioneer Forum**

*June 9, 2005*

A look at one of the most comprehensive school reform efforts in the United States by education scholar Frederick Hess, editor of a study of the seven-year reform initiative undertaken by the San Diego public school district. Hess' presentation outlined the eight lessons learned from the San Diego reform experience. Panelists included Boston public school superintendent Thomas Payzant, one-time San Diego Superintendent, and Nonie Lesaux, Harvard Graduate School of Education professor. In July 2005, Pioneer published excerpts from this forum discussing the near-overhaul of the San Diego public schools under Superintendent Alan Bersin.

## **Massachusetts Private School Survey: Gauging Capacity and Interest in Vouchers**

By Kathryn Ciffolillo and Elena Llaudet

*August 2005*

This paper takes up the practical question of whether sufficient private school seats would be available for a voucher initiative to get off the ground in Massachusetts. The study found substantial interest among private schools in publicly funded vouchers and ample private school classroom capacity for a school voucher program to be successfully launched.

March 31, 2005

**Boston Globe**

**State Plans School Construction Probe**

by Maria Sacchetti

Coverage of the state's plan to audit more than 600 school projects that had been in line for school building assistance funds since 1989, featuring a quote by Stephen Adams, former president of Pioneer.

April 4, 2005

**Boston Herald**

**Teachers the Key to Science Success**

Editorial

Opinion editorial discusses the required passage of a science examination for high school graduation by the class of 2010.

**In The News in 2005**

# Shamie Center for Restructuring Government

*The Shamie Center for Restructuring Government continued to advance reform of the Massachusetts transportation system, by following up on previous studies on public construction, consolidation, and highway maintenance.*

## **Leasing the MassPike to Private Operators**

by **Ted Bunker**

*May 2005*

A study examining the possibility of leasing the Massachusetts Turnpike to a private operator, finding that such a move could provide a financial windfall to the state.

BGC 2005 Keynote Speaker David Gergen addresses the audience



## **The 14<sup>th</sup> Annual Better Government Competition**

On June 23, the Shamie Center for Restructuring Government held an Awards Dinner featuring keynote speaker David Gergen, in recognition of the winners of the 14th Annual Better Government Competition. The Competition is Pioneer's citizens' ideas contest for improving government effectiveness. Past winners have tackled such diverse problems as pollution control, Medicaid, child welfare, and the special education system. Since the first Competition, the implementation of winning ideas has saved Massachusetts' taxpayers an estimated \$300 million.

April 15, 2005

**Boston Herald**

**Talk is Cheap in Debate over Hynes' Future**

by Scott Van Voorhis

Coverage of the state's plans for the Hynes Convention Center.

May 8, 2005

**Boston Globe**

**School Building Projects to Cost an Extra \$1.3B**

by Maria Sacchetti

Coverage of state officials who have discovered that it will cost \$1.3 billion more than expected to complete some 420 school construction projects underway in Massachusetts, featuring a quote by Stephen Adams.

## In The News in 2005



BGC 2005 Runner-up, Commissioner of the Department of Transitional Assistance, John Wagner (Comm of DTA and BGC 2005 runner up), Governor Mitt Romney, Ruth Bramson (BGC 2005 Winner, Human Resources Director), and Ruth's husband, Sheldon

## 2005 Award Winner

The Massachusetts Human Resources Division

**RUTH BRAMSON, CHIEF HUMAN RESOURCES OFFICER**

This year's winner implemented

a "shared services model" to streamline an essential—but ineffectual—state bureaucracy. The new model, developed by Chief Human Resources Officer Ruth Bramson and her staff, reduced HRD's administrative costs for the first time in a decade—and also eliminated a backlog of 22,000 unresolved medical bills.

## Runners-Up

**Streamlining Services and Expanding Opportunities for Homeless Families**

**MASSACHUSETTS DEPARTMENT OF TRANSITIONAL ASSISTANCE**

An initiative by the Massachusetts Department of Transitional Assistance, eliminating the costly use of hotels and motels for homelessness prevention, and replacing it with a longer-term sustainable solution on a case-by-case basis.

**Reclaiming Dropouts: Improved Solutions for Urban Systems (ISUS)**

**IMPROVED SOLUTIONS FOR URBAN STUDENTS**

ISUS, a successful Dayton, Ohio charter school, provides academic and vocational

BGC 2005 Runners-up, "Growing Businesses in Boston: Inner City Entrepreneurs." Featured are founders, Daniel Monti and Andrew Wolk



May 4, 2005

**Boston Globe**

**Citing '06 Budget, Trial Courts' Chief Warns of Layoffs**

by Jonathan Saltzman

Coverage of Judge Robert A. Mulligan's, chief justice for administration and management of the trial courts, memorandum to the heads of the state's seven court departments last week saying a \$23.6 billion budget for fiscal year 2006, approved by House leaders and forced him to

declare an immediate hiring freeze, and may lead to more than 200 employee layoffs. Pioneer's former Executive Director, Stephen Adams, is quoted in the article.

**In The News in 2005**



**SPECIAL RECOGNITION**

**Regulation Weeding**

A comprehensive review by the Massachusetts Office of Consumer Affairs and Business Regulation eliminating unnecessary regulations and refining/streamlining existing ones

**Accelerating Disposition of Surplus State Property**

A Division of Capital Asset Management and Maintenance program that has garnered nearly \$32 million by revamping a decades-old slow and cumbersome real estate disposition process

**Commonwealth Capital and Sustainable Development**

A Massachusetts Office of Commonwealth Development initiative that leverages grants and loans to Massachusetts municipalities to encourage sustainable development goals

**Drivers' Licenses and Protection of Citizens' Personal Identity**

Technologically-advanced licenses issued by the Massachusetts Registry of Motor Vehicles to address counterfeiting, identity theft, and other security issues

training for 16- to 22-year-old dropouts. Completion of the ISUS curricula leads to industry-recognized credentials that provides for employment opportunity.

**Growing Businesses in Boston: InnerCity Entrepreneurs (ICE)**

**AN INITIATIVE OF THE ENTREPRENEURIAL MANAGEMENT INSTITUTE AND THE DEPARTMENT OF SOCIOLOGY AT BOSTON UNIVERSITY**

Through practice and applied research, ICE promotes wealth generation, job creation, and capacity and community building by existing inner city small businesses interested in growth.

**Helping Business Startups and Expansion in Springfield**

**AN INITIATIVE OF THE CITY OF SPRINGFIELD AND THE AFFILIATED CHAMBERS OF COMMERCE OF GREATER SPRINGFIELD**

A grant program of the City of Springfield and the Affiliated Chambers of Commerce of Greater Springfield to encourage the creation and growth of minority-owned businesses.

Pioneer 2005 Interns, from left to right: John Maden, Andrew Law, Guillaume Buell, Jeremy Kutner, and Evan Hahn



May 10, 2005

**Boston Business Journal**  
**Pioneer Institute chief steps down,  
to join SBA**

News item announcing Stephen Adams departure from Pioneer Institute to join the Small Business Administration.

May 26, 2005

**Boston Herald**  
**Think Tank: Privatize the Turnpike**  
by Brett Arends

Coverage of Pioneer's report calling for the Governor to privatize the Massachusetts Turnpike Authority.

**In The News in 2005**

*The Center for Urban Entrepreneurship (CUE) worked to strengthen private and public sector business assistance available to low and moderate-income urban entrepreneurs, and to advance public policies supportive of new business growth in Massachusetts' inner cities. To reach that end, CUE worked with entrepreneurs, business groups and government officials to help them promote economic opportunity through streamlined local regulations, permitting and licensing, and through improved technical assistance services.*

## Center for Urban Entrepreneurship

### Urban Business Alliance

March 2005

The Urban Business Alliance (UBA), a partnership of the Pioneer's Center for Urban Entrepreneurship and State Street Corporation, is aimed at helping low-income entrepreneurs by bolstering the skills of the community-based business advisors they look to for assistance.

The program consists of a series of intensive training workshops for community-based business assistance organizations such as community development corporations (CDCs). Experienced practitioners from local business schools conduct the workshops and local banking professionals provide technical assistance and mentoring to the UBA participants over the subsequent six months.

The UBA conducted seminars in Boston from March through May 2005, to complete its tour of four cities. The UBA curriculum was offered through seminars in Worcester and Quincy in 2003 and Springfield in 2004. The curriculum will be available for public consumption in 2006.

The Springfield UBA Graduation was held on June 15, 2005. At the event and pictured to the left are Nancy Mirkin, Vice President of Small Business Lending, and Tony Taylor, Director of the Gasoline Alley Foundation.



### Boston Regulatory Guide

May 2005

*Navigating through Regulations and Licensing Requirements: A Guide for Boston Entrepreneurs in 20 Business Types* is designed to provide a quick grasp of the require-

May 26, 2005

**Boston Globe**

**New Report Touts Privatizing Mass. Turnpike**

by Mac Daniel

Coverage of Ted Bunker's study for Pioneer that calls for privatizing the Massachusetts Turnpike Authority, returning as much as \$5 billion to the state.

August 10, 2005

**Boston Globe**

**Pioneer Picks Executive Director**

by Thomas C. Palmer, Jr.

Article announcing Pioneer's appointment of James Stergios as its new Executive Director, effective September 15.

**In The News in 2005**

Also at the Springfield UBA graduation was Deborah King, Director of the Small Business Incubator in Springfield.



ments for starting a business in the city of Boston. Pioneer Institute has researched city, state and federal regulations and produced this how-to, step-by-step guide to preparing a business plan, obtaining permits and licenses, and filing taxes.

## **A Roadmap to Financing**

*August 2005*

This report was prepared as part of the Urban Business Alliance in an effort to give local organizations a deeper understanding of the financing process for small businesses.

For six months, two groups of Community Business Advisors collaborated with bankers from Citizens Bank, Hampden Bank and Westbank, and crafted two financing maps. “A

Roadmap to Financing” is the result of this work, and illustrates the entrepreneur’s path from concept to capitalization.

## **Strategic Planning Tool**

*May 2005*

The Center for Urban Entrepreneurship contracted with consultants to develop the beta version of an Excel-based Strategic Planning Tool (SPT) that enables business assistance practitioners to work with their client entrepreneurs to develop a strategic growth plan. Pioneer will work with the tool developers to fine-tune the product in 2006.

*“We remain firm in our belief that individual freedom and responsibility, limited and accountable government, and the expanded application of free market principles contribute to greater human dignity, happiness, and economic prosperity.”*

**—Colby Hewitt, Jr.**

June 9, 2005

**Boston Globe**

**Idea to Tax Non-Voters is Floated**

by Ned Bristol

Coverage of Daniel B. Winslow's call for people who don't vote in the annual town elections to pay higher local fees. Winslow won the Pioneer Institute's Better Government Competition in 1998 for

a plan to make the civil justice system more efficient, and he initiated a number of administrative improvements in the state courts.

## In The News in 2005

### Strategy Shift

In 2006, Pioneer will replace its E-4 Strategy with a new focus centered on the theme of keeping Massachusetts competitive through stronger action to improve educational outcomes, and to make health care, housing, and government more affordable. Towards this goal, Pioneer's efforts will address the following program areas: Education, Effective Government, Environments (both built and natural environments), Economic Opportunity, and Health Care. Also this year, Pioneer will unveil a new logo and redeveloped website, offering greater functionality and technical capacity.

## Coming in Fiscal Year 2006...

### Middle Cities Initiative

Massachusetts, like many other eastern seaboard and midwestern states, has older industrial cities that face the challenges that come with age—sclerotic political culture, significant infrastructure costs, chronically underperforming schools, lackluster retail and manufacturing sectors, crime and gang issues, and poorly targeted state programs. These “weak-market” cities have watched surrounding suburban communities attract jobs and new industries, as they have struggled to reinvigorate themselves.

In 2006, Pioneer will launch its Middle Cities Initiative to understand how these cities can be catalyzed to grow. Specifically, the Initiative will focus on core quality of life issues (improved educational opportunity and public safety), sound fiscal management and efficient delivery of services. Also as part of the Initiative, Pioneer will promote policy research on how to attract private investment and redevelopment into the Middle Cities.

### Center for School Reform

In late 2005 (Pioneer's 2006 fiscal year), Pioneer established our Center for School Reform. The mission of the Center will be to significantly improve the academic performance of elementary and secondary schools in Massachusetts through broad public dialogue, legislative outreach, and scholarly research. The Center will promote the free exchange of ideas related to academic excellence, competition, and data-driven approaches to public education reform, so that students, citizens, and the Commonwealth as a whole can compete globally.

Pioneer has already secured a highly respected Advisory Committee for the Center, including: Dr. Kenneth Ardon, Assistant Professor of Economics, Salem State; Cornelius Chapman, Esq, Partner, Burns & Levinson LLP; Nancy Myers Coolidge, Mifflin Memorial Fund; Dr. Charles Glenn, Professor, Boston University;

June 12–17

**The Patriot Ledger**

**A Special Report—Stretching Credit-ability:  
When it Comes to Finances,  
the State is Forever in Debt**

Coverage of the state's annual budget, including quotes by Stephen Adams condemning the practice of using debt financing for day-to-day Massachusetts Highway Department operational costs.

June 27, 2005

**Boston Globe**

**Budget Shifts Judicial Power,  
Chief Justice Loses Control of Money**  
by Frank Phillips

Coverage of the state budgetary initiatives that curb the powers of state court administrators to manage local courthouses, a move that critics say will strengthen the lawmakers' control over patronage.

**In The News in 2005**

Dr. Susan Goldsmith, Research Director, Boston University; Ed Kirby, Walton Family Foundation; Dr. Kathleen Madigan, President, American Board of Certification; Dr. Paul Peterson, Director, Program on Education, Policy and Governance, Harvard University; Dr. Sandra Stotsky, Director, We the People Summer Institute; and Henry M. Thomas, III, President & CEO, Urban League of Springfield.

## **Shamie Center for Restructuring Government**

The Shamie Center will focus its efforts on two key issues affecting the affordability of state government—public employee benefits and competitive contracting. Pioneer is developing a three part series examining the public employee pension and healthcare systems. The first paper will look at the unfairness embedded in the current defined benefit system, and the instances of gaming that advantage certain groups of employees. The second paper will examine the incentives in the current system, the incentives in alternative systems, and the costs of transition to alternative systems. The final paper will address the impending disclosure of Massachusetts' massive unfunded public employee health-care liability by forecasting the liability and suggesting financing strategies.

The Shamie Center will also be renewing its focus on competitive contracting, but with a focus on current success stories. The initial paper will examine the successful privatization of state-owned hockey rinks. Future papers will highlight other areas of success in competitive contracting and will be followed by attempts to allow additional areas of government service to be competitively contracted.

## **Center for Urban Entrepreneurship**

The Center for Urban Entrepreneurship will translate its Entrepreneurship Regulatory Guides into Spanish for certain cities, including Boston.

The Center will build on its experience working with urban entrepreneurs and their regulatory environment by developing an index of the competitive climate in the Middle Cities across Massachusetts. This index will consider the overall business climate, with a subset of measures focused on low and middle-income entrepreneurs. The intent of the project is to determine which cities are creating a climate that allows entrepreneurship to flourish and to spread best practices across the state.

In addition, the Center will expand its focus by studying the cost of doing business in Massachusetts. This study will break down business costs into individual components in seven key industries, then compare these costs against six competitor states. The project will take the anecdotal evidence about the state's lack of competitiveness and highlight the specific areas where Massachusetts is at a competitive disadvantage.

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*(The listing does not include tickets purchased for Pioneer Events.)*

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# Financial Data

Pioneer Institute is grateful to our many supporters who provide the means to accomplish great works through their generous donations.

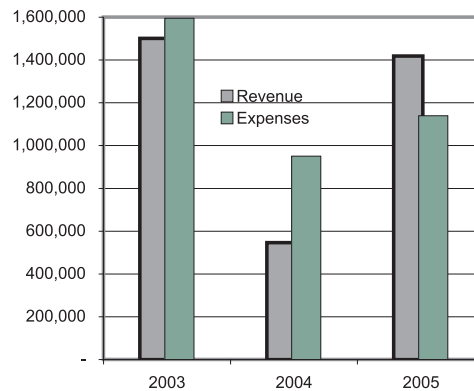
Revenue during the fiscal year 2005 totaled nearly \$1.5 million, covering expenditures of approximately \$1.2 million. The bulk of expenditures went toward programmatic, research, and outreach activities—the institute’s main mission.

As this document was being printed, these financial records were being audited by Glenn Ricciardelli, P.C. and will be available by request upon completion.

## 2005 Summary Financial Information

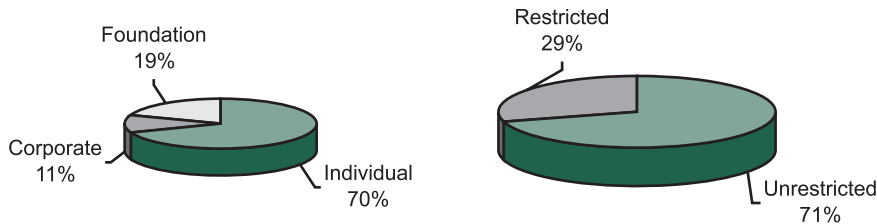
Assets:	
Cash	\$858,601
Investments	387,044
Other receivables	2,486
Prepaid items	38,347
Fixed assets	99,714
<b>Total Assets</b>	<b>\$1,386,192</b>
Liabilities & Net Assets:	
Accounts payable & Accruals	\$25,207
Deferred revenues (allocated for 2006)	73,000
Deferred rent	19,046
<b>Net assets</b>	<b>1,268,939</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$1,386,192</b>

## Revenues and Expenditures, 2003-05

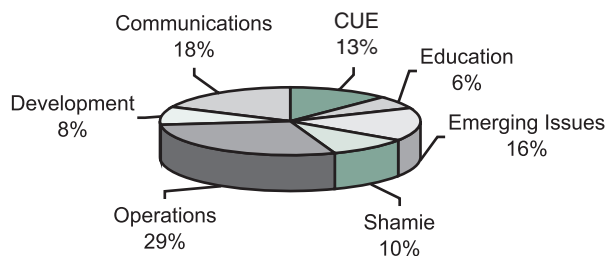


Note: Revenues and expenses in 2003 included the Charter School Resource Center, which became an independent organization on July 1, 2003. Pioneer Institute converted its fiscal year in 2004 from calendar year to October 1-September 30. Hence, revenues and expenses in 2004 are based on a nine-month period from January 1-September 30, 2004.

## 2005 Revenues

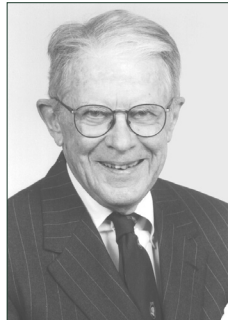


## 2005 Expenditures

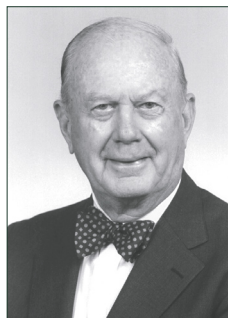


# Pioneer Staff

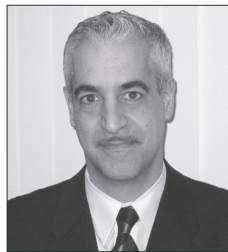
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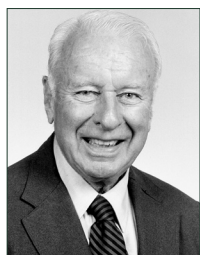
**Lovett C. Peters** is the Founding Chairman of Pioneer Institute. Following a long business career in energy and banking, “Pete” Peters began Pioneer in 1988 with a grand vision—but only a skeleton staff, which has grown steadily over the years along with the Institute’s influence. A 1936 Yale University graduate, he is a member of the Mon Pererlin Society and a trustee of Hillsdale College. His business career included executive positions with Energy Ventures, New England Energy Company, Cabot Corporation, Conoco, Laclede Gas Company, and Bankers Trust. Mr. Peters is the recipient of many honors and awards, most recently the Roe Award from the State Policy Network and, along with his wife, Ruth Stott Peters, the Champions of Freedom Award from the Mackinac Center for Public Policy. He also holds an honorary degree from Nichols College.



**Colby Hewitt** served on Pioneer’s Board of Directors for 11 years. He acted as Chairman from March 1997 until his untimely passing in August of 2005. Colby was also Chairman of New England Deaconess Hospital, Hampshire College, and Wheelock College. He served on the Board of Harvard Club of Boston; was Trustee for Life of Beth Israel Deaconess Medical Center and Northeastern University; and served as Treasurer of Dexter School. Pioneer Institute mourns the lost of a great and dedicated man.



**James Stergios\*** is Pioneer’s Executive Director. Prior to joining Pioneer, he was Chief of Staff and Undersecretary for Policy in the Commonwealth’s Executive Office of Environmental Affairs, where he chaired the Water Policy Task Force, and drove the Secretariat’s efforts on land protection, smart growth, regulatory and permit reform, and other major priorities. For the Office for Commonwealth Development, he devised urban redevelopment strategies, led the state’s reinvestment strategy in the city of Springfield, and played a major role in the development of Commonwealth Capital. Stergios had served as Pioneer’s Research Director from 2000 to 2002, during which time he directed, authored and co-authored policy studies and articles on such public policy issues as regulatory reform, housing, public construction, government efficiency, education, judicial reform, and the human services. Stergios graduated summa cum laude and holds a doctoral degree in Political Science from Boston University.



**Morris Gray** is Pioneer Institute’s Treasurer. A Harvard graduate (’43, MBA ’47), he was previously a vice president at State Street Bank. Mr. Gray is an overseer for the Huntington Theater Company, the USS Constitution Museum, and WGBH, Life Trustee of the Museum of Science, and Corporate Trustee of the Trustees of Reservations.



**April Anderson\*** is Director of External Affairs and the Center for Urban Entrepreneurship. Most recently, she served as Deputy Chief of Staff & Policy Director for the Department of Business and Technology within the Romney Administration, where she specialized in breaking down barriers to economic development in Massachusetts. Previously she worked for the state legislature in both the House of Representatives and Senate where she specialized in public policy research and development. Ms. Anderson attended Bentley College and the University of Massachusetts at Amherst.



**Amy Dain** is Project Manager for the Initiative on Local Housing Regulation, a partnership between Pioneer and the Rappaport Institute for Greater Boston. Prior to coming to Pioneer in 2004, Ms. Dain coordinated Government Affairs at the Jewish Community Relations Council of Greater Boston, served as an intern at the Massachusetts Executive Office of Environmental Affairs, volunteered in Israel, and worked as an environmental organizer in the Berkshires. Ms. Dain received her Master in Public Policy from Harvard University's Kennedy School of Government in 2003 and her B.A. in Russian Studies from Wesleyan University in 1996.



**Jamie Gass\*** is the Director of Education Research and Programs. He has over a decade of experience in public administration and education reform on both the state and municipal levels. Between 2002 and 2005, Mr. Gass worked at the Massachusetts Office of Educational Quality and Accountability (EQA). As Senior Policy Analyst-Technical Writer with the EQA, he oversaw the writing and editing of 80 school district review reports, including the Boston, Worcester, Springfield, and Lawrence public schools. Mr. Gass also worked as a policy analyst for the Worcester Regional Research Bureau and the Research and Development Unit within the Commonwealth of Massachusetts Executive Office for Administration and Finance (A&F). From 1991 through 1996, he worked for the Dean of the Boston University School of Education/Boston University Management Team in its partnership with the Chelsea Public Schools. Mr. Gass earned a Bachelor of Arts in International Relations from Boston University.



**Brian Kors** is Development Coordinator at Pioneer. A 2003 graduate of Colgate University, where he majored in political science, Mr. Kors joined the institute in 2004 after serving in a similar capacity at Citizens for a Sound Economy, a Washington, D.C.-based organization dedicated to less government, lower taxes, and more freedom. While an undergraduate, he also interned at the Philadelphia-based Foundation for Individual Rights in Education.



**Shawni Littlehale** is the Director of Development and the Program Manager of the Better Government Competition (BGC). Associated with Pioneer Institute since 1997, she has led the highly successful BGC and research projects on competitive contracting and government streamlining. She served the Weld Administration as Director of

Privatization Research and was a member of the Administration and Finance strategic planning and policy team. Her prior experience also includes consulting to the MBTA on cost-cutting measures. Ms. Littlehale has a B.A. in Government from Wheaton College.



**Steve Poftak\*** is the Director of Research and the Shamie Center for Better Government. Previously, Mr. Poftak worked at the Commonwealth's Executive Office for Administration and Finance, where he managed the \$1.3 billion capital budget, prepared the state's quarterly cash flow reporting, and monitored non-tax revenue receipts. His prior experience includes service as Director of Corporate Finance for a privatization fund in Southeastern Europe. Mr. Poftak holds an MBA from the Olin School at Babson College and a BA in Political Science from Middlebury College.



**Nayenday Thurman** is Director of Administration and Finance at Pioneer. A one-time nuclear engineer in the U.S. Navy, she joined Pioneer in 2005 after five years as Office Manager for the Schott Foundation for Public Education in Cambridge. Ms. Thurman holds a bachelor's in business administration from UMass-Lowell and is the founder and president of a foundation, called Giving the Gift of Theatre, which provides theater tickets for K-12 students.



**Alla Yakovlev** is Assistant Director of the Center for Urban Entrepreneurship. Her previous experience includes eight years organizing and coordinating international projects aimed at fostering a conducive environment for small business through corporate-community partnerships. She became associated with Pioneer in 2000 as a research associate after working as a project manager for The Prince of Wales Business Leaders Forum in the U.K. Ms. Yakovlev holds two master's degrees from Boston University, one in education administration and the other in instructional design.



In June, Pioneer's President and CEO for the past four years, **Stephen Adams**, moved on to become the U.S. Small Business Administration (SBA) New England Regional Advocate. Adams joined Pioneer in 2001 as director of the Institute's Center for Urban Entrepreneurship, which works to improve the business environment for low- and moderate-income entrepreneurs in Massachusetts. In 2003 he was named to the SBA National Advisory Council. Before coming to Pioneer, he was vice president and director of research and strategy for the Initiative for a Competitive Inner City, dedicated to urban growth businesses. Everyone at Pioneer thanks Steve Adams for his work and wishes him well in his new endeavors.

\* New employee hired between September and November 2005.

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**If you have supported Pioneer in the past, we hope this review of our achievements will persuade you to renew your support. If this is your first introduction, we hope you will decide to join us.**

\* Director retiring as of October 26, 2005

\*\* Director elected to the Board as of October 26, 2005

\*\*\* Director on leave of absence

\*\*\*\* Director passed away during term



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