



DEFENDING FREEDOM & PROSPERITY

2022 Annual Report



PIONEER INSTITUTE
PUBLIC POLICY RESEARCH



**Pioneer Public Interest
Law Center**

Pioneer Institute's **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.

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Located in Boston and founded in 1988, Pioneer Institute is a nonpartisan, tax-exempt 501(c)(3) organization. To ensure its independence, Pioneer is privately funded and does not accept government grants.

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 pioneerinstitute.org/podcasts/



BY THE NUMBERS

TOTAL MEDIA REACH:

980.6M

Followers on
Facebook:

240K

Total Downloads of
Pioneer Research:

157K

Video
Views:

1.8M

Publications:

29

Research Papers,
Policy Briefs, Books,
and Testimony

Media Hits:

2,317

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

Podcasts:

225K

Downloads

DEFENDING FREEDOM & PROSPERITY

Our 2022 annual report arrives at a critical time for our nation and our organization. Political discourse across the U.S. is today often driven by ideology rather than a search for shared understanding. Many Americans segregate and isolate themselves by seeking news that confirms their biases. Reasoned, civil discourse seems increasingly endangered.

But even as these and other challenges mount, Pioneer Institute stands ready to take them on. Strengthened by new capabilities—and guided by timeless principles of liberty, personal responsibility, and free enterprise—Pioneer has adopted a new model of excellence for think tanks.

We can no longer afford the luxury of national think tanks that generate good ideas but fail to drive change. Or state policy groups that are underfunded, take on too many issues, and succeed with few.

Pioneer offers a fundamentally different model. While rooted in Massachusetts and remaining active in state and regional issues, we have also developed tactical abilities to drive change nationally. We are hyper-focused on four policy areas—education, civics, life sciences, and economic opportunity—that are keys to our nation’s future.

A key piece of our strategy, Pioneer Public Interest Law Center (PPILC), has already gained a major win in *Carson v. Makin*, the U.S. Supreme Court case foreclosing statutory prohibitions on school choice programs created following the landmark 2020 *Espinoza* ruling. PPILC is actively involved in school choice, government transparency, free speech, and free enterprise cases.

Our expert communications team interacts with 400,000 users around the country and aims to reach 1 million users by 2025.

“A key piece of our strategy, Pioneer Public Interest Law Center, has already gained major wins.”

While deeply disappointed by voters’ approval of a tax hike amendment to the Massachusetts Constitution, we are tracking its economic impacts. With our substantially new communications and development teams we are strengthening our capacity to fight for economic competitiveness in Massachusetts.

This year’s Peters lecturer, Vivek Ramaswamy, underscored the need to defend the ideals that make open societies and free markets possible. Pioneer is committed to the free exchange of

ideas precisely because it promotes social, cultural, and economic progress for all Americans.

We are deeply grateful for your trust and investment and ask for your continued generosity in 2023. In Massachusetts and around the country, Pioneer remains dedicated to open, civil discourse as we strengthen our leadership in defense of innovation, accountability, and transparency.



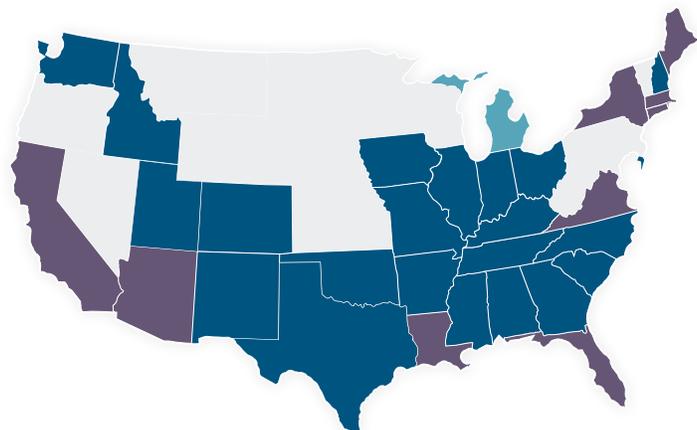
Jim Stergios
Executive Director



Adam Portnoy
Chair

IN 2022 PIONEER’S RESEARCH HAD NATIONWIDE IMPACT

- Expansion of voc-tech school enrollments in Massachusetts and export of lessons to other states.
- Filed *amicus* brief in *Carson v. Makin*, a landmark U.S. Supreme Court case that expanded religious liberty in education.
- Filed *amicus* brief in *Tyler v. Hennepin County*, a U.S. Supreme Court case regarding home equity theft.
- Helped save billions for taxpayers by stopping a bill offering pension bonuses to public employees for working or volunteering one day during the pandemic.
- Informed debate on MBTA pension reforms, helping save more than \$100 million.
- Drove debates on drug affordability and price transparency, exposing dysfunction in a federal drug program and prompting an FTC investigation of pharmacy benefit managers.

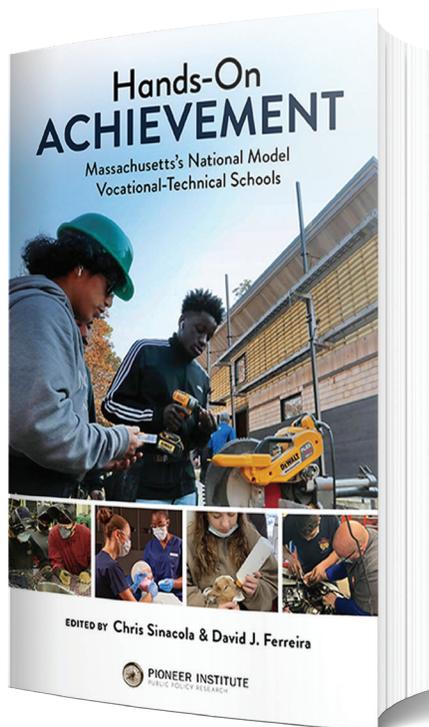


- Active on Education
- Active on Life Sciences
- Active on Education and Life Sciences

PREPARING FUTURE GENERATIONS FOR SUCCESS

America’s economic future depends on the talent and ingenuity of today’s K–12 students. Labor shortages and global competition demand high-quality academic preparation and workforce training (whether through public or private schools) of our talent pipeline. Pioneer’s initiatives are rooted in its core conviction that all families deserve access to excellent educational options. The Institute has spent decades working to remove barriers to quality schools, whether that means scholarships to private schools, expanding enrollment in charter schools, or policy reforms to turn around our chronically failing inner-city public schools.

In 2022, Pioneer supported the plaintiffs in the *Carson v. Makin* Supreme Court school-tuition case that will make private and religiously affiliated schools affordable for hundreds of thousands of low-income families. Thanks to Pioneer’s research and media campaign, the Boston Public Schools have been placed on an improvement plan and are facing greater public scrutiny. The Institute also promoted lessons from Massachusetts’ successful vocational-technical schools through publication of a book, a policy toolkit, and reports on exemplary models in the Bay State’s Gateway cities.



“As the U.S. Supreme Court takes up *Carson v. Makin*, the facts are clear. Maine has chosen to subsidize private education. As such, it cannot disqualify all religious schools from receiving public dollars under its school choice program.”

– JAMIE GASS AND CHARLES CHIEPPO

RealClear Policy

FROM COURTROOM TO CLASSROOM: Expanding School Choice

Pioneer Institute has long supported a menu of school choice options, including increased access to private and religious schools, charter public schools, vocational-technical schools, and online learning. In 2022, PioneerLegal submitted an *amicus* brief to the Supreme Court supporting the plaintiffs in *Carson v. Makin*. In a landmark ruling, the Court held that a state may not prohibit families that participate in a state-funded educational choice program from selecting schools that provide religious instruction. The ruling creates public funding opportunities for parents to send their children to religiously affiliated schools.

Pioneer also released a toolkit to help states establish private and religious school choice programs by crafting high-quality education tax credit and hybrid education savings account programs. There are now 28 tax-credit scholarship programs in 23 states, serving over 325,000 students.

MASSACHUSETTS VOCATIONAL-TECHNICAL EDUCATION

Leads the Nation

But work remains to maintain that excellence and import that model nationwide.



MAKE A GIFT
pioneerinstitute.org/donations/



Ensuring ALL kids have access



ACCELERATING LEARNING AT KIPP

Pioneer was an early incubator of the charter public school sector, helping to train charter leaders in Massachusetts, which is now home to over 75 charters serving nearly 50,000 mostly underprivileged children. One of these schools, KIPP Academy, located in Lynn and Boston, is working hard to ensure that all students have access to high-quality instruction. Pioneer sat down with KIPP Academy executive director Nikki Barnes and middle school principal Jimmy Seter to discuss post-COVID learning recovery, and how KIPP is fostering learning growth. The video earned over 220,000 views across Pioneer’s social media platforms.

WATCH OUR VIDEO ABOUT KIPP ACADEMY
On Our YouTube Channel!



IN 2022 ACTIVITIES



WEB PAGE
22,473 Visits



REPORTS
2,349 Downloads



PODCAST LISTENERS
2,310 Downloads
 FROM THE LEARNING CURVE



SOCIAL MEDIA
873K Impressions
13K Engagements



VIDEO VIEWS
 (ACROSS PLATFORMS)
200K+ Views
 “FIXING THE BOSTON PUBLIC SCHOOLS”



MEDIA MENTIONS
150+ Online, Print & Broadcast Mentions
 Most notably in *Politico*, *WCVB*, *The Boston Globe*, *Boston Herald*, *CommonWealth* magazine, *NBC Boston*, *State House News Service*, *WGBH* “Greater Boston,” *EducationNext* podcast with Jim Stergios; *City Journal* op-ed; *WBUR*, *The 74 Million*, and *RealClearPolicy*.

PioneerEducation's IMPACT

- Pioneer helped inform the U.S. Supreme Court, filing *amicus* brief in support of the victorious *Carson v. Makin* school choice case. As a result, hundreds of thousands of students now have greater access to higher-performing schools.
- Pioneer was the leading voice calling for sweeping reforms in the Boston Public Schools. In response, the state struck an agreement giving it greater oversight of the city's failing schools.
- Pioneer worked in a dozen states to export Massachusetts' best-in-the-nation vocational education model, publishing a new book, *Hands-On Achievement*, paired with legislative testimony and a media campaign across TV, radio, and print.

BUILDING MOMENTUM FOR CHANGE:

The Boston Public Schools

From February to June, Pioneer ran a media campaign, including a report and follow-up briefs, as well as numerous media appearances and public statements, to secure an improvement plan for the Boston Public Schools (BPS). Subsequently, the state education commissioner recommended a state audit, a necessary step toward receivership. Pioneer's report, *The Boston Public Schools' Road to Receivership*, earned wide media coverage in greater Boston outlets and nationally. That pressure, in conjunction with the work of the commissioner, state Board of Education members, and other stakeholders, compelled the newly elected mayor of Boston and the president of the Boston Teachers Union to appear twice before the Board of Education. They were forced to defend themselves and the BPS under ever-increasing public and media scrutiny over maladministration, loss of student enrollment, and scandal districtwide. This provided significant public leverage for the commissioner and the state as they released the second, scathing audit of the BPS since 2020, as well as aiding additional state oversight when negotiating with the mayor. In July, the commissioner and the mayor signed an agreement that includes many of Pioneer's recommendations.

"Public high schools advertising themselves as models of vocational and academic instruction have often been weak in both areas. But Massachusetts has made great strides since its 1993 Education Reform Act required that vocational students be taught with the same academic standards and tests used by regular public schools."

– JAY MATHEWS

The Washington Post

"The 30 percent of BPS students in underperforming schools continue to languish. For those students and their families, receivership represents the best hope for Boston schools to reverse a steep and long-running decline."

– JIM STERGIOS,
CARA CANDAL AND
CHARLES CHIEPPO



NEW BOOK

“RESTORING THE CITY ON A HILL:

U.S. History and Civics in America's Schools”

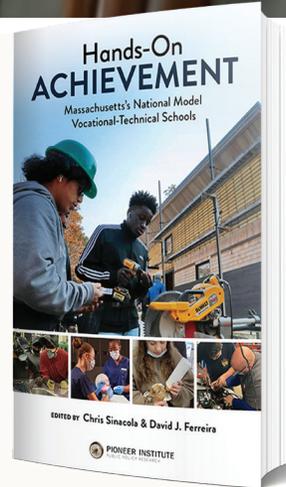
With an introduction by the late Tom Birmingham and former Gov. William Weld, Pioneer's newest book on education will review the history of U.S. history and civics instruction in Massachusetts. Policy and curriculum experts will outline how the Bay State built one of the nation's strongest history curriculums, the trends that have weakened that position, and how policymakers, educators, teachers, parents, and students can come together to once again position Massachusetts as a national leader.



SECOND TO NONE: Vocational-Technical Education in Massachusetts

Pioneer released a new book, *Hands-On Achievement: Massachusetts's National Model Vocational-Technical Schools*, paired that with a marketing campaign, and followed it up with a policy toolkit for local activists. This campaign earned national coverage in *The Washington Post*, *Public News Service*, *Washington Times*, *IndustryWeek*, *Hechinger Report*, and the College Board's *The Elective*. We collaborated with national think tanks such as The Heritage Foundation and Cato Institute as well as several state think tanks, including Kentucky's Pegasus Institute. Media coverage and webinars in our target states included California, Colorado, Iowa, Kentucky, New Hampshire, Ohio, Oklahoma, Tennessee, Texas, and Utah. And Pioneer's webinars, podcast downloads, and promotional videos reached 120,000 people.

In Massachusetts, Pioneer partnered with the vocational-technical school association to hold virtual events voc-tech schools in Worcester and Springfield and drive discussion in regional media, including State House News Service, *Worcester Business Journal*, *MassLive.com*, *The Republican* (Springfield), *CommonWealth Magazine*, *WGBH*, *WWLP-TV*, *WBZ-TV*, and *Boston 25 News*. The governor approved over \$50 million of additional funding in support of voc-tech schools, a long-time strategic goal of Pioneer Institute.



THE LEARNING CURVE PODCAST

The Learning Curve is Pioneer's weekly K-12 education podcast, featuring high-profile experts on the most timely topics in America. In 2022, The Learning Curve podcast featured guests such as historian Niall Ferguson, Khan Academy's Sal Khan, and Pulitzer-winning historians such as John Adams' biographer Joseph Ellis. It ranks among the top 200 U.S. education podcasts.

Help us ensure that the podcast reaches a broader audience!



**GERARD
ROBINSON**

COHOSTS



**CARA STILLINGS
CANDAL**



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COVID TRANSPARENCY

Last year saw progress in Pioneer’s continuing effort to make state agencies more transparent regarding COVID-19 cases and deaths in long-term care facilities. In March 2022, WGBH News published an op-ed by Pioneer on the discrepancies in the state’s reporting of deaths in eldercare facilities and the state’s failure to explain such discrepancies. A month later, in April 2022, the state Department of Public Health (DPH) complied with Pioneer’s longstanding requests to make public previously published “aggregative reports” containing data on COVID-19 cases and deaths in nursing homes and assisted living facilities.

The need for transparency is seen in the inconsistencies surrounding state reporting. In the early winter of 2022, for example, there were either 6,000 or 9,000 nursing home deaths in Massachusetts, depending upon which of two conflicting definitions one used. And one of those definitions was inconsistent with the way overall deaths were being reported. In addition, Pioneer called for an independent commission to examine the variables that resulted in the large number of deaths in such state-regulated facilities.

Our efforts to obtain DPH public records continues. At the end of 2021, after failed negotiations with state agencies to obtain data to clarify conflicting death definitions, Pioneer filed a comprehensive public records request. We are seeking records—primarily from the DPH—that may shed light on how the state counted deaths in nursing homes and assisted living facilities. Pioneer had not received all the requested documents and turned to Pioneer Public Interest Law Center to compel the state to comply with our request. Pioneer plans to create a retrospective analysis of this issue with policy recommendations.



It’s mind-boggling, frankly. It’s not a transparent way to run an operation, and it undermines the faith of the public.”

– BARBARA ANTHONY

The Boston Globe

PIONEER LIFE SCIENCES INITIATIVE

The greater Boston area features the most important cluster of life sciences knowledge and expertise in the world. For this reason, several years ago, Pioneer launched the New England Life Sciences Initiative. The goal was to address policy issues that would impact this life sciences cluster with the goal of strengthening it, and encouraging the innovation that would lead to new cures.

After a short period, it became clear that the life sciences cluster in New England was part of a global community that linked companies, universities, foundations, and governments. For that reason, we relaunched the life science initiative as the Pioneer Life Sciences Initiative (PLSI), which could address issues both national and global issues that impact the life sciences community.

Thanks to generous donor support, PLSI was able to retain two additional staff, Dr. Robert Popovian, who is both a pharmacist and an economist and who brings important expertise to our initiative, as well as Gauri Binoy, a recent graduate of Cornell with a degree in biology who serves as the PLSI research assistant.

PLSI has pursued a robust research agenda that focuses on policies to encourage innovation and help those working for cures — in Massachusetts, across the nation, and around the world.

One of the first issues addressed by PLSI was the Quality Adjusted Life Year (QALY), a cost-effectiveness tool used by European governments to rate and value new drug therapies. Upon careful examination, we concluded that the misuse of the QALY could lead to harmful access restrictions to medications for older patients, those living with rare diseases and disabilities, as well as

patients with cancer. PLSI's writings on the QALY have been rolled into a book being published in April 2023.

Another major research project for PLSI was the federal 340B program. Originally intended to provide deep discounts on drugs for nonprofit hospitals and clinics in order to fund charity care for low-income uninsured patients, PLSI research concluded that, as revenues from 340B were expanding, hospitals were reducing their charity care spending. PLSI also built a website that demonstrates the growth of for-profit 340B "contract" pharmacies that were now operating in the program. PLSI's research demonstrated that the 340B program had strayed far from its original mission of helping low-income patients, laid out by Congress in 1992.

In addition to these major research projects, PLSI staff published more than 20 op-ed pieces on life sciences subjects, often in national or Beltway publications. These op-eds addressed many of the current life sciences policy issues being discussed by policymakers, such as drug price

controls and reimbursement.

PLSI's research has had significant impact. For example, several conservative House Republicans introduced legislation to ban the use of the QALY as its use might lead to medicine "rationing." At the same time, the Biden Administration repudiated the use of the QALY in rating therapies for Medicare, expressing the worry that people living with disabilities would be harmed — precisely the point made in PLSI research.

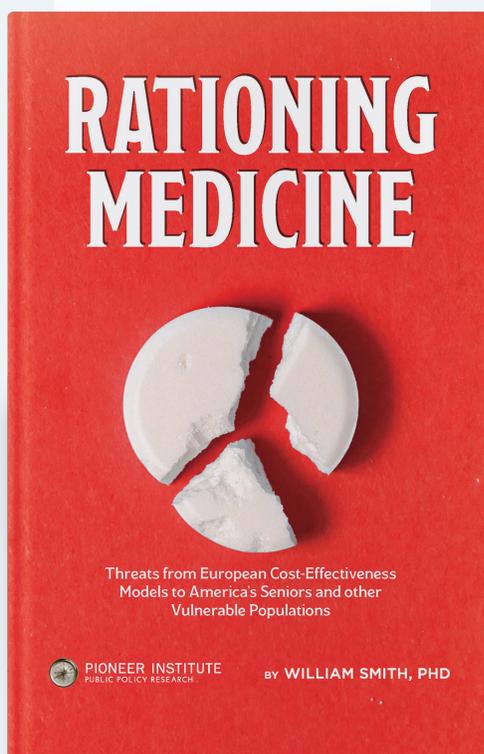
In addition, PLSI's research on the 340B program attracted the attention of the then-House Minority Leader Kevin McCarthy's staff as well as the Republican staff for the House Energy and Commerce Committee, which has jurisdiction over 340B. PLSI staff were invited to the U.S. Capitol to give a briefing on their 340B research.

PLSI will continue to drive the debate around life sciences and meet the original goals of the Initiative.

NEW BOOK

Read our new
book on problems
with the QALY

available at
amazon



PLSI's research on the 340B program attracted the attention of the then-House Minority Leader Kevin McCarthy's staff as well as the Republican staff for the House Energy and Commerce Committee, which has jurisdiction over 340B.



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FIGHTING FOR A MORE COMPETITIVE MASSACHUSETTS

While over half the states in the nation have joined the movement to attract residents and businesses by reducing state income taxes, Massachusetts has bucked the trend, embarking on a wildly dangerous course that jeopardizes the Bay State’s economic future. Pioneer Institute has done numerous studies on the perils of adopting the public employee unions’ new graduated income tax, which will hike state taxes by 80 percent on those making more than \$1 million beginning in 2023. Even before the tax hike, Massachusetts shed taxpayers and wealth at a clip six times faster than even just a decade ago. Between 2010 and 2020, Massachusetts’ net loss of adjusted gross Income (AGI) to other states due to migration grew from \$422 million to \$2.6 billion, according to IRS data.

The public employee unions’ successful effort to redistribute wealth is fraught with economic hazard. This implementation of the new tax, now part of the Massachusetts Constitution, has made it more important than ever that Pioneer focus on policies that can mitigate the impact of this new tax scheme while we work together with other thought leaders to undo its harms.

Economic competitiveness and access to talent are the two most challenging issues business leaders face. With a dwindling, aging labor force and a mismatch between skill sets and job openings, businesses need to know that policymakers understand the issues that could potentially drive them from the state. We will continue to press transportation and fiscal issues, but to promote job growth and economic prosperity, Pioneer’s priorities will include a focus on business climate in Massachusetts and immigrant entrepreneurship in our state and across the country.

“*Immigrants bring pioneering ideas and provide a dynamism not easily matched by native U.S. citizens. In a time of labor shortage, arguably brought on by pandemic-era restrictions on immigration, legislators and other government officials should promote policies that will make it easier for entrepreneurially inclined immigrants to immigrate to and work in the United States, as well as create new businesses.”*

– AIDAN ENRIGHT AND JOSHUA BEDI
in their white paper
“Immigrant Entrepreneurs and the Barriers They Face”



BUSINESS CLIMATE

The voice of business needs unity and amplification in Massachusetts. Businesses will falter without new talent pipelines, more seats in vocational schools, including after-hours for adults, and greater emphasis on credentialing and certificate programs at community colleges in areas of workforce shortages. We will address anticompetitive occupational licensing complexities and apprenticeship restrictions that delay the hiring process or discourage willing individuals from workforce participation.

To mitigate some of the workforce housing shortage, we will review housing programs and MBTA zoning compliance. We will also continue work on rent control issues and easing restrictions on accessory dwelling units to make moving to Massachusetts more attractive.

The cost of doing business, including business and personal income taxes, unemployment insurance, the high cost of healthcare premiums and efforts to boost the minimum wage even higher serve to deter new business creation and relocation to Massachusetts. At a time when states are competing fiercely for residents and businesses, we cannot be complacent that the quality of educational and healthcare institutions will continue to draw innovators to our state.



CHAMPIONING IMMIGRANT ENTREPRENEURSHIP

This thriving biotech ecosystem has become a cornerstone of the state’s economy, and – if government regulation does not unduly interfere – will continue to help drive U.S. economic growth and medical innovation for decades to come.

The experiences of these and so many others in immigrant communities underscore the importance of overcoming barriers, developing opportunities, and sharing experiences.



The capital’s really being used to make communities more sustainable, more resilient, and create opportunities for people in those communities to really get to the next level.”

– Belarus native Yuliya Tarasava, COO and cofounder of impact investment platform CNot



Immigrants who come here have a tremendous desire to succeed because they came here against all odds and they want to succeed. And I think because of that they have an ethos and values that they want to contribute that can only make the country better.”

– Patrick Anquetil, French-born analyst, researcher, entrepreneur, and Chief Executive Officer of Portal Instruments, Cambridge, Massachusetts



THE JOBMAKERS PODCAST

During fiscal 2022 year, Denzil Mohammed explored the world of risk-taking immigrant entrepreneurs with 40 episodes of the JobMakers podcast, produced by Pioneer Institute and the Immigrant Learning Center. Denzil’s guests come from every continent, speak many languages, and have very different life experiences, but are united in their pursuit of the American Dream.

HOST

DENZIL MOHAMMED



FIGHTING FOR A MORE COMPETITIVE COMMONWEALTH

Flunking the graduated income tax

The approval by voters of a graduated income tax proposal in November 2022 marked a loss for competitiveness in Massachusetts, putting us on the same dismal road to a future of higher taxes and lower growth that Connecticut has chosen since 2010.

But this story isn't finished, and Pioneer is continuing its efforts to counteract this ill-considered new tax. Pioneer is tracking the fallout from the imposition of the "millionaires' tax"—which will be felt by residents across the economic spectrum.

Recognizing the realities of an increasingly mobile workforce and the need to promote entrepreneurs, New Hampshire will eliminate its interest and dividends tax by 2027.

NEW HAMPSHIRE HAS ALREADY PROFITED BY OUT-MIGRATION FROM MASSACHUSETTS—

**by more than \$426 million—
EVEN BEFORE THE TAX HIKE WAS PASSED.**

Putting common sense before ideology

While collecting the evidence for the harmful impacts of a new, graduated tax, Pioneer continues to offer analysis of the business climate among those who remain in Massachusetts—and recommendations to help them succeed.

While a majority of the public did not heed our warnings in 2022, we will continue our study of tax collections, the outflow of people and capital, and the business climate among those who remain. Our goal: Accurate, compelling data to guide lawmakers toward more productive policies.

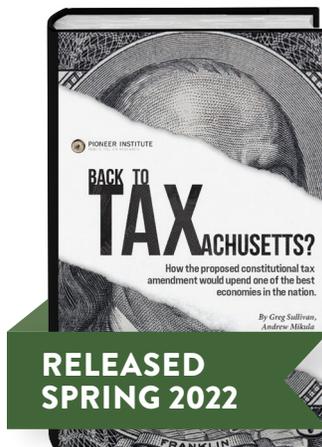
Transporting Massachusetts forward

Even the most competitive business environment is of little use if workers cannot get to where they want and need to be—easily and affordably.

Pioneer continues to push for modernization of the MBTA. Our research shows the path to a more rational fiscal policy to foster the investment and modernization the system desperately needs to maintain the flow of human capital that is vital for robust growth—in Boston and beyond.

WATCH OUR VIDEO ABOUT THE GRADUATED INCOME TAX on our YouTube Channel!

<https://www.youtube.com/watch?v=q6s-P5feFI8>



THE HENRY STUDIO

EILEEN MCANNENY

is a Senior Fellow in Economic Opportunity at Pioneer Institute. She was formerly president of the Massachusetts Taxpayers Foundation, and has experience in government relations, public policy, advocacy, and management in both the public and private sectors. She was president and CEO of the Massachusetts Society of CPAs, Director of Public Policy at Fidelity Investments, and served as Senior Vice President of Government Affairs and Associate General Counsel at Associated Industries of Massachusetts, where she focused on healthcare and tax policy issues. McAnneny served on the state's 2007 Tax Commission and was formerly

a staff attorney for the Joint Committee on Revenue of the Massachusetts legislature. In 2018, she served as Vice Chair of the Governor's Commission on the Future of Transportation. She is a cofounder of the Massachusetts Employers Health Coalition, serves on the Group Insurance Commission, is on the board of the Massachusetts Business Alliance for Education, and is secretary of the National Taxpayers Conference. McAnneny holds a bachelor's degree in politic science, *cum laude*, from Tufts University and earned her juris doctorate in law from Suffolk University Law School.

 emcanneny@pioneerinstitute.org

A RELENTLESS PUSH FOR MORE OPEN GOVERNMENT

During 2022, Pioneer continued to be a leader in promoting open and transparent government in a state that is one of only two nationwide whose governor claims a blanket exemption from key laws with which all others must comply. Through blogs, research papers, social media posts, and our print, TV, and radio appearances, we continued the call for Massachusetts to live up to its historical legacy as the cradle of liberty by fostering transparent government—including a legislature willing to abide by open meeting laws that apply to every one of our 351 cities and towns.

We continued to expand our MassWatch suite of tools to help citizens access the information that is vital for a healthy democracy. Even as the COVID-19 pandemic began to recede, local officials grown accustomed to online meetings too often grew lax in adhering to the requirements of the state’s opening meeting and public records laws. Pioneer was there, both to publicly challenge such abuses and to show residents the path to the data they need — on public employees, taxes, schools, municipalities, pensions, elections, corporations, courts, crime, Census data and much more — even the state’s nascent cannabis industry.



This suite of websites allows the public to access vast amounts of information on state and local governments.



LABOR ANALYTICS



MAPPING COVID IN MA



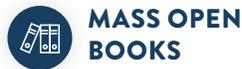
COVID UNEMPLOYMENT TRACKER



MASS ECONOMIX



FINANCIAL DISCLOSURE



MASS OPEN BOOKS



MASS ANALYSIS



MASS IRS DATA DISCOVERY



MASS REPORT CARDS



MBTA ANALYSIS



MASS PENSIONS

<https://pioneerinstitute.org/masswatch/>

Our 2022 transparency interns helped residents understand how and where their tax dollars are being spent — and the options available to them:

- Exploring progress on the MBTA’s Green Line extension project
- Assessing dramatically lower tax burdens in neighboring New Hampshire
- Noting Massachusetts remains among the least financially transparent states
- Calling for a comprehensive performance management framework for the state



Sunshine Week was launched in 2005 by the American Society of News Editors — now News Leaders Association — and has grown into an enduring initiative to promote open government.



When PioneerLegal was founded some eight years ago, it was little more than an idea. In 2022, we came of age, bringing together a talented legal team, enlisting the advice and support of a distinguished board of trustees, and forging a new identity as Pioneer Public Interest Law Center (PPILC).

Citizens often wonder whether a given government taction is legal or violates the Massachusetts or U.S. Constitution. Often, they may feel that a particular program or policy infringes on their civil rights. But most citizens lack legal training, and even those with time to advocate for themselves often lack the resources and knowledge needed to properly assess the legality of a given government action.

PPILC exists in order to answer such questions, and to do so on behalf of ordinary citizens, business owners, and organizations.

Under the leadership of President Frank J. Bailey, retired United States Bankruptcy Judge for the District of Massachusetts, and board Chairman Brackett Denniston, PPILC is positioning itself as a regional public interest law center with national impact. Staff attorneys Selena Fitanides and John C. La Liberte bring a wealth of knowledge and experience to their new roles with an organization that, through legal research and briefs will pursue highly focused, strategic litigation.



The Honorable Frank J. Bailey

U.S. Bankr. Judge (ret.)

In 2022, PPILC filed amicus briefs in...

- **U.S. Auto Parts Co., Inc. v. Commissioner of Revenue**, in which the Massachusetts Supreme Judicial Court ruled that out-of-state retailers cannot be compelled to collect use taxes merely because of “cookies” in their websites.
- **Carson v. Makin**, in which the U.S. Supreme Court ruled that Maine could *not* exclude families who choose religious schools from participation in state scholarship programs.
- **Tyler v. Hennepin County**, in which the U.S. Supreme Court will decide whether government policies allowing seizure of equity from homeowners is constitutional.

The dawn of a new fiscal year found PPILC more active than ever, filing briefs and seeking plaintiffs in key cases involving equity theft from property owners, governmental distortion of tax law, violations of citizens’ free speech rights, and school choice cases — all matters of enormous importance for the rule of law and the health of our Constitution and republic.



What didn’t change— and never will—is our commitment to three core tenets:

- 1 Educational opportunity** is vitally important in a just and merit-based society.
- 2 Government** must be transparent, limited, and accountable.
- 3 Markets free from unwarranted intrusion** provide the greatest opportunity for all.

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IN ORDER TO MORE CLEARLY IDENTIFY THE ORGANIZATION WITH ITS MISSION, IN 2023 WE RENAMED PIONEERLEGAL

PIONEER PUBLIC INTEREST LAW CENTER

FOSTERING FREE SPEECH, FREE THOUGHT & OPEN DIALOGUE

Through in-person and virtual events, Pioneer connects with supporters and leading thinkers on key economic, political, and social topics. Our goal is simple: Reclaim the time-honored principle of a respectful, fact-based exchange of ideas in the best tradition of American democracy.

Hewitt Healthcare Lecture **WHAT IS DRIVING AMERICA'S FENTANYL CRISIS?**

On September 22, 2022, the 15th annual Hewitt Healthcare Lecture was held at Harvard Medical School.

The keynote speaker was John Walters, President and CEO of Hudson Institute and formerly Director of the White House Office of National Drug Control Policy. Walters discussed the causes of the fentanyl crisis, offered lessons we can draw from our nation's history, and recommended solutions to the ongoing epidemic. William Smith, Pioneer Senior Fellow and Director of the Pioneer Life Sciences Initiative, led a question-and-answer session.



The Lovett C. Peters Lecture **AMERICAN CORPORATE GOVERNANCE: STAKEHOLDERS OR STOCKHOLDERS?**

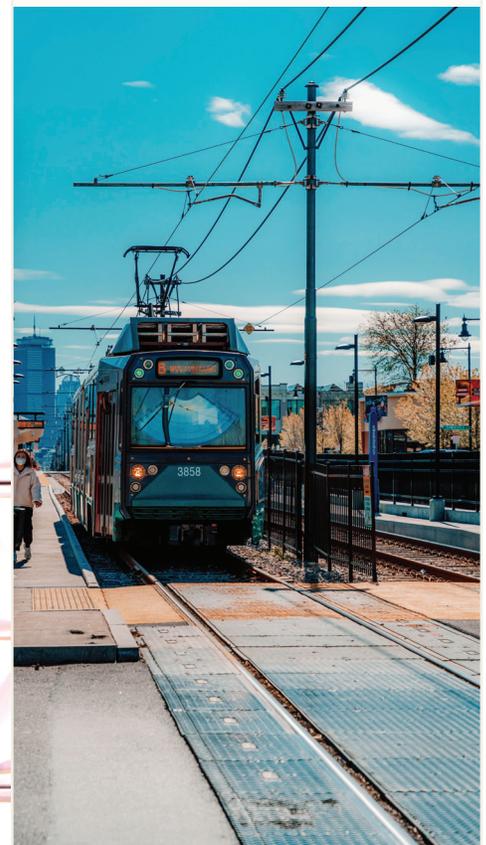
Vivek Ramaswamy, entrepreneur, author, and activist, delivered the keynote address at Pioneers' 2022 Peter Lecture in November. The former CEO of Roivant Sciences, Ramaswamy now chairs Strive Asset Management, a firm that rejects the trend toward environmental, social, and corporate government (ESG) investing. Ramaswamy has detailed his views in two recent books, *Woke Inc.: Inside Corporate America's Social Justice Scam* and *Nation of Victims: Identity Politics, the Death of Merit, and the Path Back to Excellence*. In a wide-ranging talk, he called stakeholder capitalism a cancer that is a threat to democracy itself. It promotes, Ramaswamy said, a society where political differences are settled not through free speech and open debate, but "through economic force where our viewpoints are adjusted upwards or downwards by the number of dollars that we control in the marketplace."

Pictured Top: John Walters, President and CEO of Hudson Institute and former Director of the White House Office of National Drug Control Policy. **Right:** Vivek Ramaswamy, entrepreneur, author, and activist.



PIONEER PUBLIC INTEREST LAW CENTER SUES THE MBTA TO OBTAIN PUBLIC INFORMATION

In August 2022, the MBTA had an arbitration award over the Amalgamated Transit Union that impacts the pension fund of 5,000 participants. When Pioneer Institute sought the arbitration document through a public records request and was turned down by the T, Pioneer Public Interest Law Center brought the matter to court.



AMPLIFYING PIONEER'S DIGITAL REACH

Over the years, Pioneer has consistently aimed to ensure that its free market message and scope and depth of analysis are reaching the broadest possible audiences. In 2022, Pioneer made significant progress expanding its digital presence, especially with regard to increasing Google visibility, and the Institute's Instagram and YouTube subscriber base. Pioneer also increased podcast downloads and email contacts, supporting strategic efforts to build an owned audience. Pioneer's work has been amplified through connections with high-profile featured guests such as historian Niall Ferguson, Khan Academy founder Sal Khan, former *New York Times* educator Bari Weiss, and many more.

JobMakers Podcast

"Whether it was [because I was an immigrant] or something genetic, I started building businesses & new projects early on. By the time I started MarketMuse, I had founded about seven different things. A computer repair company with my friends at 15, a European conference series at the University of Michigan that we ran for three years, a tech club for Michigan business school undergraduates & just a bunch of other different kinds of projects. So I've always been trying to find new opportunities, but MarketMuse was the first tech company where I actually just wanted to create something new."

Aki Balogh, Immigrant from Hungary & Co-founder of MarketMuse

476 Likes

739 Reactions

"They found that, 65% of the time, kids, especially kids who live on the lower end of the socioeconomic scale,... are being given below grade level work. Now, when the exact same children are given above grade level work, the study finds that they rise to the occasion, & they're able to do it & do it better. So this begs the question: Why is it that we continue to have this attitude of not challenging kids too much?"



Cara Candal
Co-Host of The Learning Curve



TRADITIONAL MEDIA

2,317 Mentions | 1B Reach
TV, radio, online & print

WSJ The Washington Post AP



One might ask why state legislators, who put this constitutional amendment on the ballot, are so determined to return to the bad old days of Taxachusetts. The tax revenue would come at a steep cost... the proposed tax would primarily affect retirees and small businesses"

- JIM STERGIOS, THE WALL STREET JOURNAL



890

Reactions

THE LEARNING CURVE PODCAST

"Why aren't there any Attorney Generals from blue states that are a part of this lawsuit? Why haven't more states severed ties with the National School Board Association?"

GERARD ROBINSON
CO-HOST OF THE LEARNING CURVE

41K

Impressions



ICH BIN UKRAINER:
European Nation
Existential Fight Against Aggression

HUBWONK

JobMakers

HUBWONK

The **LEARNING CURVE**
Pioneer Institute's
Education Podcast

“It’s time for state leaders to intervene. Together the state and the city should select a new receiver-superintendent best equipped to work with the state to develop a plan to radically overhaul the Boston Public Schools.”

– JIM STERGIOS & CHARLIE CHIEPPO

RealClear Policy

“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

IN 2022
ACTIVITIES



GOOGLE

4.6M Impressions



WEBSITE

271 Posts

1.01M Page Views



VIDEOS

78 Posts

1.8M Views

5K Subscribers



SOCIAL MEDIA

6,165 Posts

23M Impressions



EMAIL MARKETING

298 eBlasts

95K+ Leads



PODCASTS

140 Episodes

225K Downloads

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IN MEMORIAM TOM BIRMINGHAM

Nothing is a greater priority for Pioneer Institute than education, and no one was more dedicated to the cause of education than the late Tom Birmingham. Tom grew up poor in Chelsea and appreciated the value of education, integrity, and hard work. He became a star athlete, Rhodes scholar, Harvard Law School graduate, and president of the Massachusetts Senate. In 1993, he coauthored the Commonwealth's landmark Education Reform Act, which former governor and coauthor William Weld called "a possession for always." As Pioneer's Distinguished Senior Fellow in Education, Tom dedicated the final years of his life to protecting high academic standards, MCAS, accountability measures, and school choice—elements at the heart of education reform. Tom fought tirelessly for public charter, Catholic, and vocational-technical schools. Pioneer is fortunate to have known this kind, brilliant, and independent-minded man.



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

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IN MEMORIAM DAVID POWELL

Born and raised in the Midwest, David built a career as an engineer, entrepreneur, and inventor in service to the entire nation. After earning degrees at Princeton and MIT, David worked at Lockheed, Stanley Aviation, General Electric, and W.R. Grace. He developed an emergency escape capsule for the B-58, cofounded an abrasives company with his beloved Elizabeth, garnered 11 patents, and was an avid sailor, skier, and cyclist. Above all, David was devoted to his wife, three children, and six grandchildren. We are grateful for David's friendship.



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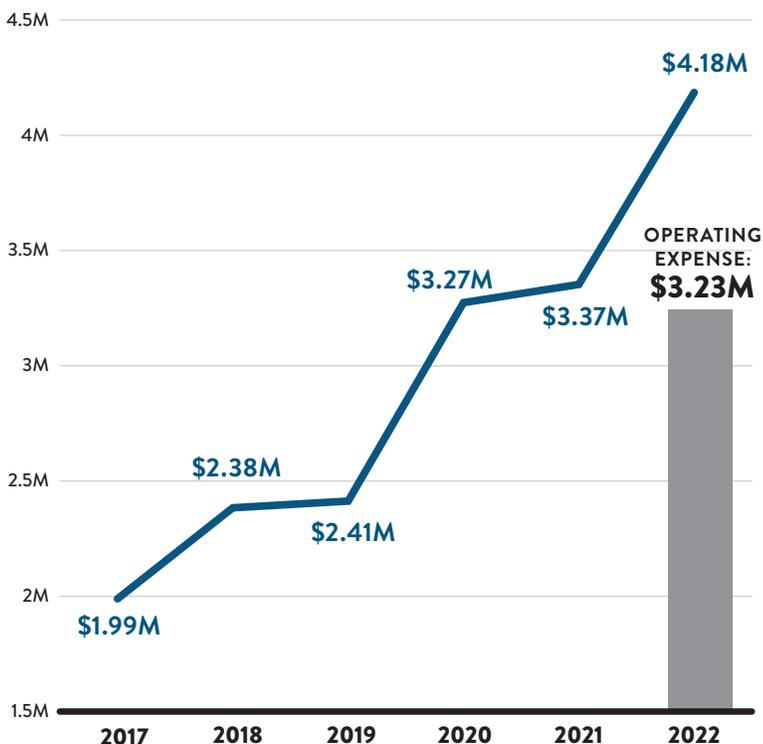
IN MEMORIAM MICHAEL DAVIS

Michael Davis was a part of the Pioneer team from its earliest days, serving as Pete Peters' lawyer, Pioneer's go-to expert on tax matters, and a member of the Audit Committee. Long recognized as one of the nation's top tax attorneys, Michael was a devoted husband, father, and grandfather. While a man of few words, his actions spoke volumes. Michael was ethical, insightful, and effective in all that he did, from his enthusiasm for cycling, passionate advocacy for the State of Israel, and long-time dedication to the work of Pioneer Institute.



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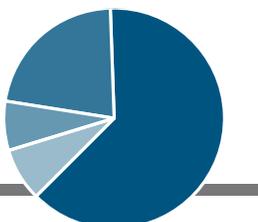
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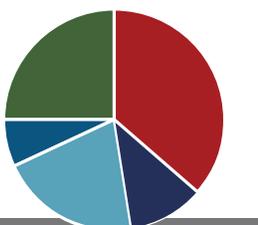
BY CATEGORY

- Research & Programs: 62%
- Development: 22%
- Operations: 9%
- Communications: 7%



BY RESEARCH PROGRAM AREA

- PioneerEducation: 37%
- PioneerOpportunity: 25%
- PioneerHealth: 21%
- PioneerPublic: 11%
- PioneerLegal: 6%



SEE AUDITED FINANCIAL STATEMENTS AVAILABLE AT
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FINANCIAL STRUCTURE

The 2022 Financial Statements reflect the consolidated financial results of Pioneer Institute, Inc., and its affiliate, PioneerLegal, LLC, a not-for-profit public interest law firm established in December 2021 as an LLC with Pioneer Institute as its sole member. Complete Fiscal Year 2022 Audited Financial Statements are available at pioneerinstitute.org.

Pioneer Institute and PioneerLegal, (together the “Organization”), are privately funded, accepting no government funding.

In the fiscal year ended September 30, 2022, the Organization received approximately \$4.2 million in contributions, with 69 percent of those without donor restrictions and 31 percent with donor restrictions. Total expenses represented 77 percent of total revenue, and the Organization increased its net assets by \$514,428 during the year.

FINANCIAL POSITION

| ASSETS | |
|---|---------------------|
| Cash | \$ 1,798,184 |
| Contributions Receivable | 360,025 |
| Other Assets | 26,915 |
| Investments | 3,575,283 |
| Property & Equipment | 769,815 |
| Total Assets | \$ 6,530,222 |
| LIABILITIES & NET ASSETS | |
| Accounts Payable & Other Accrued Expenses | \$ 153,243 |
| Total Liabilities | 153,243 |
| NET ASSETS | |
| Without Donor Restrictions | 4,705,831 |
| With Donor Restrictions | 1,671,148 |
| Total Net Assets | 6,376,979 |
| Total Liabilities & Net Assets | \$ 6,530,222 |

As of 9/30/22

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