

MassINC
RESEARCH. JOURNALISM. CIVIC LIFE.
10 YEARS

Annual Report

The Massachusetts Institute for a New Commonwealth

2005

The Massachusetts workforce is more of a melting pot than ever before, according to a report released today by the nonpartisan Massachusetts Institute for a New Commonwealth.

SUNDAY TELEGRAM & GAZETTE (WORCESTER) *June 19, 2005*

Immigration rises, English skills lag.

HEADLINE FROM THE ASSOCIATED PRESS, *June 19, 2005*

Baby boomers' upcoming retirement plans could have dramatic consequences for the Massachusetts housing market, work force, and civic organizations, according to a study released today.

METROWEST DAILY NEWS (FRAMINGHAM),

Sunday, November 13, 2005

Based on the numbers, today's new pilgrims are critical to the state's future success, just as critical as some of its earlier arrivals. Investing in their English skills is good business for all of us.

The New Pilgrims, editorial,

OLD COLONY MEMORIAL

(PLYMOUTH) *June 22, 2005*

The MassINC survey should be required reading for Massachusetts policy makers.

From Boomer Bust, EDITORIAL IN THE TELEGRAM & GAZETTE (WORCESTER), November 15, 2005

The MassINC study, which we reported on June 19 and 20, can't overstate the importance of immigrants in Massachusetts.

METROWEST DAILY NEWS, *July 1, 2005*

For some boomers, bills trump retirement.

HEADLINE IN BOSTON SUNDAY GLOBE, *November 12, 2005*

A new study on the Massachusetts nonprofit sector by the Massachusetts Institute for a New Commonwealth confirms what many of us in the sector have long known: Massachusetts nonprofits are a significant economic engine for the Commonwealth.

State's Sleeping Giant Stirs, OP-ED IN BOSTON BUSINESS JOURNAL,

April 8, 2005

MassINC in 2005: *Highlights*

Boomers speak — As the oldest Baby Boomers turn 60, a landmark MassINC survey asks them “what lies ahead?”

Big issues...spirited debate — *The Commonwealth Forums* take on health-care, mass transit, and minor league baseball as a catalyst for urban renewal.

A heritage of diversity — Dr. Ilan Stavans presents the 2005 Commonwealth Humanities Lecture: *This Land Is Our Land: The Challenge of Diversity in Massachusetts*.

Young professionals get real — In its second year, the RealTalk program engages young adults in discussions about *New Civic Leadership*, *Welcoming New Bostonians*, and *Getting Around Town*.

New pilgrims — *The Changing Face of Massachusetts* shines a bright light on the importance of immigrants to the Bay State economy—and the need to increase English language skills.

Civic convener — MassINC events bring together diverse audiences, totaling more than 4000 people, to learn and talk about the challenges facing the Commonwealth.

Sponsorship marks 100...more than doubling in three years — More than 100 civic-minded businesses, labor unions, foundations and organizations now support MassINC's work and advertise in *CommonWealth*.

What's next for Boston? — *CommonWealth* poses the question in the wake of major corporate mergers—and a diverse group of community leaders gives controversial answers.

The circle grows — The Citizens' Circle expands to 130 individuals whose commitment and involvement are essential to the MassINC mission.

The economics of good works — *The Massachusetts Nonprofit Sector: An Economic Analysis* casts a spotlight on the sector's role as major source of jobs and a steadying influence on the state economy.

Building a stronger workforce — *The New Skills for New Economy* campaign hits its stride through policy impact and ground-level community action on literacy.

On to the next decade — With renovated offices at Tremont Street and a new state-of-the-art Web site, MassINC moves into its 10th Anniversary year...and gets set for the future.

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Letter from the Co-Chairs

MassINC had a banner year in 2005, more than ever setting the tone for the civic debate over critical challenges our state is facing. Our organization has become an indispensable resource for political, business, labor and philanthropic leaders alike. On behalf of the entire board, we want to give our sincere thanks to all of MassINC's partners for making it all possible.

We look ahead to 2006 with excitement and pride. This year marks our 10th anniversary as an organization. From the outset, MassINC focused on the opportunity and challenge of living the American Dream in Massachusetts – on the core issues of jobs and economic opportunity, educational excellence and workforce skills, community safety, quality of life, cost of living and the renewal of civic life. These are the challenges we continue to face in our ever-changing Commonwealth.

The news has not all been good. MassINC has documented that skills and education are becoming major hurdles to a middle class standard of living, that the rules of retirement are changing very quickly and placing new responsibilities on each and every individual, that cost of living has become the number one concern for families here and that we need to look anew at the important role immigrants are playing in our economy.

MassINC has also carved out a unique position in the changing world of journalism through *CommonWealth* magazine, now approaching its 10th anniversary as well. It is a publication unlike any other in the nation, and we are very proud of its reputation for fairness, depth and insight into the politics, ideas and civic life of our state.

But MassINC is more than research and journalism—it represents a civic meeting place for our state's leaders and citizens alike. We have worked hard to win the confidence of Republicans and Democrats, business and labor, conservatives and liberals. Regardless of our labels and affiliations, we are all animated by our commitment to making a better Massachusetts—a new Commonwealth.

Nothing this organization has done would be possible without the generous support of our sponsors, Citizens' Circle members, and Friends of MassINC. We thank you for your help, and we'll be counting on you in the future as we begin a second decade of MassINC.

Gloria Cordes Larson
Co-chair

Peter Meade
Co-chair

Sponsors

MassINC thanks its sponsors for their support. By making our operations possible they receive advertising space in *CommonWealth* magazine and recognition throughout the civic community. Our key project partners are listed throughout this report in conjunction with individual programs. We could not accomplish this important work without their help.

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Report from the President

Compared with the year before (Red Sox World Series victory, our first national political convention, vigorous debates over gay marriage), 2005 was perhaps a more sober year for Massachusetts. Still, new developments caught the public's attention, forming a classic combination of challenge and opportunity.

For starters, there was the near-completion of the Big Dig, presenting the opportunity to make the Rose Kennedy Greenway into something truly special for future generations. And there was renewed discussion about the nature of corporate civic leadership as the merger and acquisition trend swallowed leading Massachusetts companies like Reebok, Fleet, Gillette and John Hancock.

These are substantial topics. But in my view, we in Massachusetts have more important things to talk about—with maintaining our edge in a skilled workforce and doing something about cost of living at the top of the list.

Our state lost residents for a second year in a row, and the economic recovery remains weak. In any person's book, our state can't compete on weather, so our skilled workforce remains our premier competitive advantage. A low cost of living will never be our strong suit either, but how can we grow our economy if people can't afford to live here?

These questions have been the focus of our attention in 2005—MassINC's most successful year in terms of impact. Our research on immigration, employment in the nonprofit sector and on Baby Boomers all identified important trends. In addition, *CommonWealth's* Growth & Development Extra, published in the first week of 2006, focused attention on housing affordability, urban redevelopment, and quality of life.

As we look ahead, 2006 will be a special time for MassINC, marking our 10th anniversary as an organization. In lieu of a gala dinner, we're working to inform citizens, the media and candidates about the challenges we see before us. We only get this chance every four years, and the issues are too important to let the opportunity go by. Many thanks to all who are helping us make 2006 a year we can look back on as a turning point for MassINC—and for our state.

Ian Bowles
President

The Citizens' Circle

MassINC's Citizens' Circle brings together people who care about the future of Massachusetts. The generosity of our Citizens' Circle members has a powerful impact on every aspect of our work. We are pleased to extend significant benefits, including invitations to our private Newsmaker series, to those who can join with a minimum annual contribution of \$1,000.

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MassINC Research:

From Beacon Hill to cities and towns across the state

MassINC research brings the power of informed analysis to challenges facing Massachusetts. We work to understand how and why things are changing for families in our state, and then use our findings to create a public agenda for change. In 2005, MassINC broke new ground in extending its research insights to cities and towns across the Commonwealth, examining three issues with far-reaching implications.

The Massachusetts Nonprofit Sector: An Economic Profile

In March, MassINC analyzed the importance of the nonprofit sector as a leading employer for the state. Working in partnership with University College of Citizenship and Public Service at Tufts University, we released *The Massachusetts Nonprofit Sector: An Economic Profile*, a report made possible through sponsorship from the Mellon Charitable Giving Program/Alice P. Chase Trust and The Boston Foundation.

This report showed that Massachusetts nonprofits contribute substantially to the Bay State economy. Key findings include.

- The Massachusetts nonprofit sector is among the largest in the nation, employing more than 13 percent of the state's workforce—nearly double the national average—and encompassing more people than the public sector in the Bay State.
- In recent years, the nonprofit sector has added more than 33,000 jobs, an increase of 9 percent, during a time of overall employment decline.
- The sector is especially diverse in Massachusetts, encompassing 25,000 nonprofits that range from universities and health care institutions to small community organizations.

We enlisted experts from many fields for a provocative panel event about the report. They included Eric Kriss, Secretary, Executive Office of Administration & Finance, Commonwealth of Massachusetts; David F. Lamere, Chairman & CEO, Mellon New England; Nancy L. Leaming, President & CEO, Tufts Health Plan; Alan Solomont, Chairman of the Board, University College of Citizenship and Public Service, Tufts University; Bill Walczak, CEO, Codman Square Health Center; and Michael Weekes, President, Massachusetts Council of Human Service Providers.

By developing data on local nonprofit employment, we highlighted the importance of the sector to cities and towns across the Commonwealth. The regional media then used this data to place this story in the local context.



The Changing Face of Massachusetts

MassINC focused the state's attention on immigration with the June release of *The Changing Face of Massachusetts*, a report that has proven to be one of the most visible and widely referenced in MassINC history. This report was part of MassINC's *New Skills for a New Economy Awareness and Action Campaign* and sponsored by Nellie Mae Education Foundation, Verizon, Citizens Bank, the Polaroid Fund at The Boston Foundation, and Bank of America's Frank W. and Carl S. Adams Memorial Fund.



A joint project with the Center for Labor Market Studies at Northeastern University, *The Changing Face of Massachusetts* documents the growing importance of immigrants to the state's economy. The findings reveal:

- As of 2004, one in seven Massachusetts residents was born in another country.
- The share of immigrants in the Massachusetts workforce nearly doubled from 9 percent in 1980 to 17 percent in 2004.
- Since 2000, the state's labor force is estimated to have grown by less than 1 percent. Without immigrants, the state's labor force would have shrunk.
- The number of immigrants with limited English-speaking skills rose from 17.5 percent in 1980 to 21.5 percent in 2000, an increase of almost 100,000 people.
- While immigrants have become our state's principal source of new labor, growing numbers are arriving with limited English-speaking skills and a substantial number lack a high school diploma.
- Immigrants with limited English skills are clustered in the state's larger cities.

The ability to speak English well has become a key ingredient for economic success. It is important for individuals and for the state's economy. Going forward, our state faces a serious human capital challenge. Immigrant workers have become indispensable to the Massachusetts economy. But, at the same time that the education and skills required for success are increasing, large numbers of immigrants lack a high school diploma and have limited English-speaking skills.

We launched the report at a forum that engaged a standing-room-only audience in a lively discussion on a range of topics. The event began with a presentation by the report's lead author, Andrew Sum, Director of the Center for Labor Market Studies at Northeastern University. It was followed by a panel that included: Donna Cupelo, Regional President, Verizon; Larry Fish, Chairman & CEO, Citizens Financial Group; Dianne Portnoy, Co-founder & Executive Director, Immigrant Learning Center; Rocío Sáenz, President, S.E.I.U. 615; Jerry Villacres, Director, El Planeta; and Blenda Wilson, President & CEO, The Nellie Mae Education Foundation. Massachusetts Senate President

Robert Travaglini wrapped things up with his personal observations on the immigrant tradition in the Bay State.

In conjunction with the report, we published a searchable database that provided a town-by-town look at immigration across the state. This database became the centerpiece of a Boston.com online special report and the basis for extensive regional feature news coverage that added local human interest to the issue.

In addition, Ian Bowles teamed up with Larry Fish, Chairman & CEO of Citizens Financial Group to write an op-ed article on *Immigrants and The American Dream* that appeared in papers across the Commonwealth.

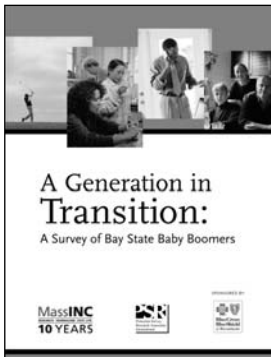
MassINC also collaborated with the Hispanic news weekly *El Planeta* to produce an abridged form of the report as a Spanish language insert called *La Nueva Cara de Massachusetts*, the first time that MassINC has published its work in a language other than English.

A Generation in Transition: A Survey of Bay State Baby Boomers

As the leading edge of the Boomer generation approached 60 years of age, the November release of *A Generation in Transition: A Survey of Bay State Baby Boomers* highlighted how this coming wave could impact Massachusetts. Conducted for MassINC by Princeton Survey Research Associates International and generously underwritten by Blue Cross Blue Shield of Massachusetts, the survey asked 1,000 Baby Boomers across the state about their current circumstances and future plans for work, retirement, housing, caring for family members, and civic concerns.

We found that this generation with a tradition of rewriting the rules of society is poised to do so once again.

- Massachusetts Boomers appear ready to redefine retirement itself. The research shows that many plan to delay their retirement past the current norm, and roughly two-thirds expect to continue working in some capacity even after they retire.
- Of those who plan to continue working after they retire, 39 percent will do so because of financial necessity rather than choice.
- Only 17 percent of Boomers expect to live very comfortably in their retirement years. Nearly one-third (30 percent) of the state's Boomers have less than \$50,000 in retirement savings, including 13 percent who hold no retirement savings at all.
- More than one-third of Boomers (36 percent) currently rank their finances as fair or poor.
- The survey foreshadows a Boomer exodus—exacerbating the state's population loss challenge. More than a third of Boomers (35 percent), roughly 650,000 people or 10 percent of the state's population, want to retire outside of Massachusetts.

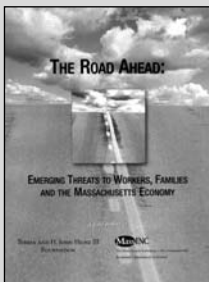


There are 1.83 million Boomers in Massachusetts, accounting for nearly 30 percent of the state’s population and roughly 45 percent of its workforce. By virtue of their sheer demographic size, their actions will impact the economic, political, and civic worlds around them.

The nature and extent of those changes were the focal points of a roundtable briefing featuring: Deborah Banda, State Director, AARP Massachusetts; Carol Geremia, President, MFS Institutional Advisors; Natalie Jacobson, Anchor, NewsCenter 5; and Milton Little Jr., President & CEO, United Way of Massachusetts Bay. *CommonWealth* Editor Robert Keough moderated the discussion.

A Generation in Transition captured headlines in newspapers across the state, complemented by the personal stories of survey participants who were willing to relate their situations and plans to the media.

Ahead of the curve



Long before the issues make headlines, MassINC research identifies factors and trends that will impact the quality of life and economic vitality of the Bay State. We were the first to identify the state’s brain drain, high cost of living, and growing reliance on immigrant workers as potential challenges to the state’s competitiveness. Our 1998 report – *The Road Ahead: Emerging Threats to Workers, Families, and the Massachusetts Economy* – provides an example of how MassINC watches the horizon for the Commonwealth.

RESEARCH FINDINGS — 1998

The high cost of living...is leading to a brain drain and a heavier reliance on foreign immigration

The biggest factor that contributes to our higher cost of living is the high cost of housing.

...most of our state’s comparative income advantages are being eroded by our state’s high cost of living and that erosion is beginning to undermine our ability to compete with other states for workers.

HEADLINES — 2005

“The Massachusetts Workforce is more of a melting pot than ever before...”

SUNDAY TELEGRAM & GAZETTE (WORCESTER), June 19, 2005

“An immigration influx and native population decline has amplified the impact of foreign-born residents on the workforce in Massachusetts...”

CAPE COD TIMES (HYANNIS), June 19, 2005

“In Massachusetts, a quarter of the people in the state said they would leave if they had the opportunity....The No. 1 reason cited by those who want to leave: the high cost of living. And the No. 1 area needing major improvement: housing affordability.”

CNN/ MONEY, December 8, 2005

“Bigger, warmer states with growing economies are luring young, well-educated workers and their families from Massachusetts. The result, they say, is a shrinking workforce that will constrain the state economy and compel companies to do business elsewhere.”

BOSTON GLOBE, December 23, 2005

Perspectives: *MassINC* at 10 years

“Ten years ago, there was no respected, non-partisan, research-based voice to tell the truth about the critical issues facing the middle class. Now there is—and it has exceeded my expectations. I’m very proud of MassINC and my early role in it.”

MITCHELL KERTZMAN *MassINC Co-founder; Partner, Hummer Winblad Venture Partners*

“Our partnership with MassINC has helped us get new data, issues, insights and ideas out into the public debate. MassINC excels at this kind of work—and we could not be more pleased with our association.”

BLENDA WILSON, *President & CEO, Nellie Mae Education Foundation*

“MassINC is breathtakingly effective in elevating the public dialogue and influencing policy through research and journalism.”

ROBERT HOLLISTER, *Dean, Tufts University College of Citizenship and Public Service*

“It’s refreshing to be able to have a nonpartisan policy discussion...I support their efforts to make Massachusetts a better place to live.”

CHRISTOPHER EGAN, *President, Carruth Capital LLC*

MassINC Milestones — The first ten years

MassINC begins



First issue of *CommonWealth*

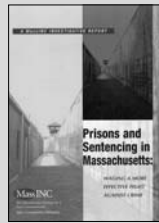
Report:

- *Closing the Gap: Raising Skills to Raise Wages*

First major MassINC event: *Are Schools Improving?*

Reports:

- *Lessons Learned: 25 Years of State Economic Policy*
- *The Road Ahead: Emerging Threats to Workers, Families, and the Massachusetts Economy*



Reports:

- *Opportunity Knocks: Training the Commonwealth's Workers for the New Economy*
- *New Skills for a New Economy*

CommonWealth 5th Anniversary Issue—A visit back to Heritage Road

MassINC launches 02133 Web site—the precursor to *IssueSource*

1996

1997

1998

1999

2000

2001

CommonWealth visits Heritage Road—a quintessential middle class neighborhood

First research report: *State of American Dream in New England*

Offices: MassINC starts at 55 Summer Street ...and then moves to 177 Tremont

MassINC launches its first web site



First edition of the *Campaign Issues Briefing Book for Candidates and Voters*

The CommonWealth Forums begin

Reports:

- *Prisons and Sentencing in Massachusetts*
- *The Changing Workforce*

Forum: *Conflict or Consensus? The Renewed Debate Over Land Use Planning in Massachusetts*

Forum: *Making the Grade*

Offices: MassINC moves to 18 Tremont Street



Start of the *New Skills for a New Economy Awareness and Action Campaign*

MassINC receives first Citizens' Circle check

“MassINC provides two valuable assets for our business community. First, in the research and the development of public policy. For example, reporting on demographic changes in the regional work force that help align our employment opportunities with suitable labor supply. Second, the communication of bi-partisan policy ideas through *CommonWealth* magazine.” DAVID C. WEINSTEIN, *Executive Vice President, Fidelity Investments*

“MassINC has been a remarkable success—in ten short years it has gone from a glimmer in the eye of a small group of civic entrepreneurs to become a central opinion leader in Massachusetts. Its strength is a remarkable combination of relevance and objectivity—together with a deep commitment to the American Dream in a time of great change.”


GLORIA CORDES LARSON *MassINC Co-chair; Partner, Foley Hoag LLP*

“Whether the subject is economic inequality, immigration, or education, MassINC is consistently a critical resource and source of fundamental insights into the challenges and opportunities for working men and women in Massachusetts. We are proud to be MassINC’s partner in this work—and look forward to the next 10 years.”

MARK ERLICH *Executive Secretary-Treasurer, New England Regional Council of Carpenters*

“After ten years, MassINC has proven itself as a highly credible source of information for foundations, policymakers, business and civic leaders, and the media.”

PAUL S. GROGAN, *President & CEO, The Boston Foundation*

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| <p><i>Politics UNUSUAL</i></p> <p>Event: <i>Politics Unusual</i>—MassINC’s 5th Birthday</p> <p><i>CommonWealth</i> Education Reform Extra</p> <p>The Rennie Center launches</p> | <p>MassINC founder Tripp Jones departs; Ian Bowles takes over</p> <p>Debut of <i>In the Commonwealth</i>—<i>Boston Globe</i> Ideas</p> | <p><i>CommonWealth</i> Health Care Extra</p> <p>Reports:</p> <ul style="list-style-type: none"> • <i>The Graying of Massachusetts</i> • <i>MASS.commuting</i> <p><i>RealTalk</i> debuts</p> | <p>MassINC RESEARCH. JOURNALISM. CIVIC LIFE.</p> <p>10 YEARS</p> <p>The <i>CommonWealth</i> Forums: <i>A New Prescription: Cost, Value and Competition In Health Care Reform</i></p> |
| <p>2002</p> | <p>2003</p> | <p>2004</p> | <p>2005</p> |
| <p>Reports:</p> <ul style="list-style-type: none"> • <i>From Cell to Street</i> • <i>The State of the American Dream in Massachusetts</i> <p>Event: <i>East Meets West: Bridging the Politics, Economies and Histories of Eastern and Western Massachusetts</i></p> | <p>Reports:</p> <ul style="list-style-type: none"> • <i>The Pursuit of Happiness</i> • <i>MASS.migration</i> <p>Forum: <i>A Decade of Learning: Education Reform in Massachusetts</i>. Governor Mitt Romney participates</p> | <p><i>Commonwealth</i> Humanities Lecture debuts</p> <p>100th member of Citizens Circle</p> <p><i>CommonWealth</i> Online Exclusive: <i>Beyond Red & Blue</i></p>  | <p>Reports:</p> <ul style="list-style-type: none"> • <i>The Massachusetts Nonprofit Sector</i> • <i>The Changing Face of Massachusetts</i> • <i>A Generation in Transition</i> <p>First MassINC foreign language publication: <i>Changing Face</i> executive summary appears as Spanish insert in <i>El Planeta</i></p> |

2006: MassINC turns 10

CommonWealth:

The civic journal of record for the Bay State

As MassINC celebrates its 10th anniversary, *CommonWealth* magazine marks its own decade as a nonpartisan voice on the big issues facing Massachusetts. Since its beginnings in 1996, *CommonWealth* has built a diverse readership of movers and shakers who've come to appreciate its uncommon combination of insight, analysis, and balance.

In 2005, *CommonWealth* continued to break ground with the depth of its coverage, ability to engage civic and policy leaders, and its singular capacity to get people talking about the issues.



CommonWealth puts Ideas in the Boston Sunday Globe

In 2005, the editors of *CommonWealth* became familiar names to the readers of the *Boston Sunday Globe's* Ideas section. Building on an editorial relationship begun in 2004, Robert David Sullivan, Michael Jonas, and Robert Keough provided a lineup of thought provoking pieces for the *Globe*, many of them adapted from the pages of *CommonWealth*.

List of articles on next page.



WINTER

- Cover feature: *Kings of the Hill* – Profiles and interviews with Beacon Hill's Big Three – Governor Romney, Senate President Travaglini, and House Speaker DiMasi.
- *Driven to Distraction* – A consideration of the sorry state of auto insurance in Massachusetts and whether proposed reforms can help.
- *Courage of Their Convictions* – The verdict on attempts to make criminal justice, from eyewitness identification to the death penalty, more scientific.

- *Curses!* – An essay pondering the question on every Bostonian's mind after the Red Sox won the World Series: What will Beantown do without the Curse of the Bambino?

SPRING

- Cover feature: *Corporate Citizens* – Marshall Carter, Ferdinand Colloredo-Mansfeld, Thomas Hynes Jr., Rosabeth Moss Kanter, and Una Ryan sort out the implications of the John Hancock/Fleet/Gillette acquisitions and Boston's unfamiliar status as a branch office city.



- *Preschool Promise* – A look at the state's new agency for early childhood education and the relentless advocacy of crusader Margaret Blood to make it a reality.
- *Hitting the Jackpot* – An examination of the state's love-hate relationship with legalized gambling, beginning with the Lottery.
- *Taxes* – Boston Mayor Thomas Menino calls for more city authority to levy taxes on things other than property; municipal watchdog Sam Tyler and anti-tax crusader Barbara Anderson respond.

CommonWealth
articles in Boston
Sunday Globe IDEAS

The State of the Commute

February 13, 2005

Why it's getting tougher than ever to get around Massachusetts.

B-School for HMOs

February 27, 2005

Michael Porter, renowned professor at the Harvard Business School, makes the case for bringing real competition to health care, but others think that will only make things worse.

Shrinking Pains

April 18, 2005

Why Massachusetts is losing population, and what that means for the future.

Sic Transit

May 22, 2005

A look at the debate over mass transit projects tied to the Big Dig, which some now deem irrelevant and wasteful. Based on a *CommonWealth* article and online forum.

Bright Flight

July 17, 2005

Is the Bay State's vaunted "creative class" coming... or going?

Mapping Immigration

August 21, 2005

In conjunction with the release of the groundbreaking MassINC report on immigration — *The Changing Face of Massachusetts* — *CommonWealth* maps out the state's immigrant populations for the *Globe's* readers.

A Toast to The General Court

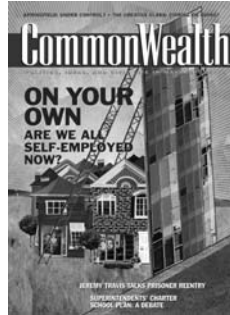
October 23, 2005

CommonWealth pays homage to the Massachusetts General Court—commonly known as the state Legislature—on its 375th anniversary.

Back to Taxachusetts?

November 6, 2005

As Prop 2½ reaches its 25th anniversary, its proponents celebrate—but may have cause to worry.



SUMMER

- Cover feature: *Lone Rangers* — Independent workers were once hailed as pioneers of an emerging "free agent nation." Now they seem to be the cutting edge of less-secure employment arrangements for all.
- *Under Control* — An examination of the state Finance Control Board's attempt to clean up mismanagement in Springfield, leading to a high-stakes showdown with the city's municipal employee unions.

- *Approaching Reentry* — National crime expert Jeremy Travis discusses the rising number of prison inmates returning to communities and his hopes for a new "jurisprudence of reintegration."
- *Making Connections* — A look at Lawrence CommunityWorks, a community development corporation that is as committed to building "networks" of engaged citizens as it is to constructing new homes and supporting new businesses.

FALL

- Cover feature: *Rooting for the Home Team* — Minor league baseball as a big-league phenomenon in struggling cities across Massachusetts.
- *Getting Down to Business* — As economic-stimulus bills make their way through the Legislature, a look at the real impediment to growth in Massachusetts: the costs of living and doing business.



- *A Toast to the General Court* — An offbeat history of the Commonwealth's legislative branch on its 375th anniversary.
- *In Need of a Renaissance* — A power struggle at the state's largest charter school highlights a central question for the charter school movement: Are these schools about choice, or excellence?

CommonWealth breaks ground on growth & development

CommonWealth dug into the state's growth and development challenges in a special extra edition—only the third in the magazine's history, and at 120 pages the biggest issue ever. It covered a range of topics central to the cost of living and quality of life in the Bay State. Among the highlights:



- In “House Rules,” Associate Editor Michael Jonas asked whether the state’s smart-growth initiatives would jump-start the construction of moderately priced housing in development-averse suburbs.
- Harvard’s Rappaport Institute for Greater Boston weighed in with institute Director Edward Glaeser and his colleagues Jenny Schuetz and Bryce Ward showing how restrictive local regulations result in less housing production and higher prices for homes throughout the area.
- Development expert and social critic Joel Kotkin made the case for a “New Suburbanism” in a provocative Conversation interview with Editor Robert Keough.
- Contributing writer B.J. Roche reviewed Pittsfield’s “Second Act,” as the GE-abandoned city tries to remake itself as the urban hub of a spreading Berkshire County arts colony.
- Staff Writer Gabrielle Gurley detailed the role of the MBTA as a transportation link between growing suburb and renascent city, and looked for signals about whether Dan Grabauskas, miracle worker at the Registry of Motor Vehicles, can repeat his turnaround act at the T.
- In his Two Bits essay “Revolting Development,” Associate Editor Robert David Sullivan put a spotlight on the dark image of developers and development in popular culture.

CommonWealth Growth & Development Extra—Sponsors

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The Commonwealth Forums

The Commonwealth Forums have become a signature event series for MassINC, providing a popular focal point for discussion and debate about the major issues addressed in *CommonWealth* magazine. In 2005, the forums took on three big subjects:

EVENT PANELISTS

A New Prescription

Charles Baker
President & CEO,
Harvard Pilgrim Health Care

Richard Lord
President & CEO, Associated
Industries of Massachusetts

Richard Marlin
Chairman, Massachusetts AFL-
CIO Health Care Task Force

John McDonough
Executive Director,
Health Care For All

James Mongan MD
President & CEO,
Partners HealthCare

Ronald Preston
Secretary, Executive Office of
Health and Human Services

End of The Line

Stephen Burrington
Undersecretary, State Office
for Commonwealth
Development

Ellin Reisner
President, Somerville
Transportation Equity
Partnership

David Luberoff
Executive Director, Rappaport
Institute for Greater Boston

Frederick Salvucci
MIT lecturer and former State
Transportation Secretary

Philip Warburg
President, Conservation Law
Foundation and CLF Ventures

Double Play

Charles Euchner
author of *Playing the Field*

Timothy P. Murray
Mayor of Worcester

Nancy Savoie
City Planner, City of Brockton

Alan Stone
President & CEO,
Worcester Tornadoes

Kendall Wallace
Chairman of the Board,
Lowell Sun

A New Prescription: Cost, Value and Competition In Health Care Reform February 17, 2005

Following up on the *CommonWealth* Health Care Extra, this event addressed questions of cost, value, and competition. Governor Mitt Romney elaborated on his proposal for expanded health insurance coverage, and Harvard Business School Professor Michael Porter presented his prescription for true competition based on the value of health care delivery. A panel of industry experts debated the merits and weighed in with their own ideas. House Speaker Salvatore DiMasi wrapped things up with closing remarks.

End of the Line? Big Dig-Related Transit Projects and the Future of Public Transportation May 26, 2005

A panel of transportation experts and advocates continued the debate—launched by the *CommonWealth* article “Dug In” and carried further by an online forum—over whether future mass transit projects should carry out, or rethink, commitments made in connection with approving the Big Dig 15 years ago.

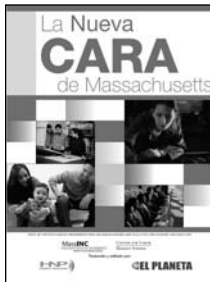
Double Play: Minor League Baseball and Urban Revitalization November 4, 2005

As many of the state’s smaller cities continue to struggle, a number of them—including Worcester, Lowell, and Lynn—have embraced minor league baseball as a way to draw fans into communities and revitalize their economies. A panel representing divergent viewpoints tackled the idea.

New Skills for a New Economy in 2005: *Impact and influence*

The News Skills for a New Economy Awareness & Action Campaign (NSNE) focuses public debate and policy resources on the “skills gap” and its impact on the Commonwealth.

Skills are the fundamental currency of the Massachusetts economy and skilled workers are the state’s key advantage in attracting and retaining business investment. Through the NSNE campaign, MassINC works to strengthen the state’s workforce by addressing the need for adult basic education (ABE), English for Speakers of Other Languages (ESOL), and workforce training programs at community colleges.



- Meeting the English language challenge: The MassINC research report *The Changing Face of Massachusetts* helped focus public attention on the important role that immigrants have in our economy—and the need to help our newest citizens gain the English language skills they need to be part of our Commonwealth. Working with the publisher of the Hispanic newspaper *El Planeta*, we created an abridged Spanish language version of the report for distribution to the Hispanic population of Greater Boston.
- Leadership to increase graduation rates: Building on work begun in 2004 with the state Board of Higher Education, we collaborated on a report to define goals for improving student graduation rates at state colleges. The overall objective is to achieve rates that match or exceed those in top ten peer states across the country.
- Philanthropic impact: During the year, MassINC Vice President John Schneider chaired the United Way of Massachusetts Bay sustainable employment impact council, advising the United Way on its growing investments in workforce development and adult basic education.
- Improving government’s role: MassINC was a key partner in the Reach Higher Initiative, a public/private collaboration to help working adults complete community college workforce development programs. In its final report, the initiative recommended ways in which Massachusetts could enable low skilled workers to build their skills while helping employers fill specialized job openings.
- Literacy in our communities: Throughout 2005, the NSNE LiteracyWorks partnerships in Lawrence and Hampden County continued to advance the cause of increasing capacity of ABE/ESOL community programs and connecting employers to this effort.



New Skills for a New Economy Sponsors

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Polaroid Fund at
The Boston Foundation

Bank of America Frank W. and
Carl S. Adams Memorial Fund

Nellie Mae Education
Foundation

Civic life:

Events that get people talking

MassINC events draw people who value open debate, energized discussion, and provocative ideas that they can bring back to their own organizations and work. Our programs are a sharp departure from staid policy presentations and muted hearings. They connect audiences to big issues through creative interaction with legislators, expert commentators, influential journalists, labor leaders, business innovators, and policy advocates representing divergent points of view.

Every MassINC event gets Bay Staters talking. Nearly 4,000 people joined the discussion by attending one or more of our programs in 2005. Highlights from the year include:



- A special Commonwealth Forum on healthcare — *A New Prescription: Cost, Value, and Competition in Healthcare Reform*.
- Panel forums on the implications of MassINC research about the nonprofit Sector, immigration, and the Baby Boom generation.
- Keynote presentations and panel discussions providing many perspectives from leaders across the political spectrum. Governor Mitt Romney, Senate President Robert Travaglini, and House Speaker Sal DiMasi headlined our events, along with leaders in health care, business, organized labor, local government, education, academia and journalism.
- Programs highlighting the regional implications of our work in Boston, Western Massachusetts, Metrowest, Merrimack Valley, and the South Shore.
- RealTalk town-hall style forums that engage young working Bostonians in the civic life of their city and communities.

In 2005, MassINC made it easier to access its event programming online. Through our partnership with the WGBH Forum Network, we now offer audio and video transcripts of our programs as streaming media or downloadable podcasts. This cutting edge technology lets our audiences watch or listen to MassINC events at their convenience.



The new MassINC offices

In the fall of 2005, the MassINC staff worked their way through a major renovation of our offices. For those who have visited us in the past, the new space is unrecognizable. We hope you will come visit us and take a look!

MassINC online

The new MassINC Web site

In October, the new MassINC web site went live at www.massinc.org. A year in the making, the new site brings MassINC's work to life—in an easily accessible manner and with a cleaner look.

With this new Web site MassINC set out to raise the bar for online excellence, usability, and rich, meaningful content in the Massachusetts public policy field. We achieved that vision with the generous support of The Boston Foundation, State Street Corporation, and the Cabot Family Charitable Trust.

IssueSource and CivicSource

Throughout 2005, MassINC introduced new elements to IssueSource.org that make it a singularly useful resource for anyone researching politics, public policy, and the issues that make news in Massachusetts. IssueSource combines the no-nonsense factual reporting of The State House News Service with the impartial insight and analysis of *CommonWealth* magazine. Logically organized and rich in detail, it is designed for students, community activists, civic leaders and journalists alike.

CivicSource.net is the newest online resource from MassINC: a calendar of civic events and programs across Massachusetts. A free service provided by MassINC and the Commonwealth Civic Roundtable, CivicSource enables public interest organizations to post their events in a format that gives online viewers full program details in a single click. Launched in mid-2005, this online event calendar has proven to be a useful tool for event organizers and a ready reference for civic-minded audiences.

The MassINC network keeps growing

MassINC continued to reach new online audiences throughout 2005. At year's end, the online network of people receiving our bi-weekly e-update had grown to nearly 17,000 individuals.

Friends of MassINC

MassINC greatly appreciates the support and involvement of its many friends.

MassINC Patrons (\$500+)

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The Dominion Foundation
The One Family Campaign
Johan E. Uvin

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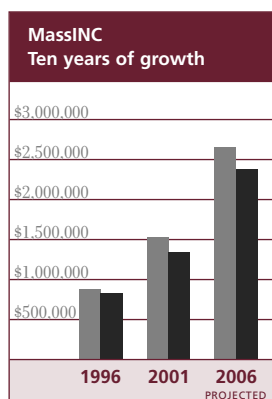
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2005 Financial results*

| Statement of Activities | FY2005 | FY2004 |
|---|---------------------|---------------------|
| INCOME | | |
| Grants | \$ 1,067,229 | \$ 880,531 |
| Rennie Center for Education | | |
| Research & Policy Grants | 150,750 | 309,225 |
| Sponsors | 692,104 | 530,992 |
| Individuals | 248,887 | 261,657 |
| Other Income | 12,924 | 19,855 |
| In-kind Contributions | 43,230 | - |
| Total Income | \$ 2,215,114 | \$ 2,002,259 |
| EXPENSE | | |
| Magazine | \$ 633,200 | \$ 586,448 |
| Policy | 506,195 | 376,295 |
| Outreach & Communications | 490,615 | 414,749 |
| Rennie Center for Education | | |
| Research & Policy | 223,484 | 301,628 |
| Development | 270,486 | 271,446 |
| Management & General | 198,010 | 289,361 |
| Total Expense | \$ 2,321,990 | \$ 2,239,927 |
| Transfer to another non-profit entity | 300,090 | - |
| Total Expense & Transfers | \$ 2,622,080 | \$ 2,239,927 |
| Statement of Financial Position | | |
| ASSETS | | |
| <i>Current Assets</i> | | |
| Cash and Cash Equivalents | \$ 949,366 | \$ 1,218,772 |
| Contributions Receivable | 24,638 | - |
| Prepaid Expense | 3,108 | 2,603 |
| Total Cash | \$ 977,112 | \$ 1,221,375 |
| Property & Equipment, Net | 42,668 | 26,472 |
| Other Current Assets, Net | 89,676 | 66,286 |
| Total Assets | \$ 1,109,456 | \$ 1,314,133 |
| <i>Liabilities</i> | | |
| Current Liabilities | | |
| Accounts payable | \$ 20,009 | \$ 34,282 |
| Unearned Revenue | 282,000 | 67,850 |
| Accrued Expenses | 8,456 | 6,044 |
| Total Liabilities | \$ 310,465 | \$ 108,176 |
| <i>Net Assets</i> | | |
| Unrestricted | \$ 598,641 | \$ 593,118 |
| Temporarily restricted | \$ 200,350 | \$ 612,839 |
| Total Net Assets | \$ 798,991 | \$ 1,205,957 |
| Total Liabilities and Net Assets | \$ 1,109,456 | \$ 1,314,133 |



■ Income ■ Expense

*Audited

MassINC turns 10 in 2006

To mark this milestone, MassINC is taking on a new set of initiatives to put the opportunity and challenge of living the American Dream in Massachusetts into the civic spotlight in 2006. Our initiatives are being supported by a special 10th Anniversary Fund.

We would like to acknowledge the individuals, organizations, foundations and companies that have made early pledges to help us build our fund. Everyone at MassINC thanks them for their generosity, civic leadership and commitment to building a new Commonwealth.

MassINC 10th Anniversary Fund Donors

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Helen Spaulding

To find out more about making a gift to the MassINC 10th Anniversary Fund, please contact Rob Zaccardi at 617-742-6800.



The Massachusetts Institute for a New Commonwealth

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