



2011 Annual Report

All aboard. Taking off.



Brian W. Thompson President and CEO Commerce Bank

We are proud to support The Research Bureau in its continued efforts.

Commerce Bank is proud to continue a half-century tradition of helping people and businesses prosper. In addition, our strong commitment to helping our communities thrive by investing in neighborhoods, volunteering our time and supporting the economic growth of our region has made a positive impact in the region.

Our growth has been predicated on our philosophy of delivering innovative products, services and capabilities that our customers and communities want, need and deserve. This has resulted in our bank being regarded as one of the region's most desirable places for business banking.

We are proud to support The Research Bureau in its continued efforts to research public policy issues and maintain its foothold as a leading source of information for government, businesses and citizens.

Our continual support of local organizations is instrumental in executing our social mission of stimulating economic growth and a sense of well-being in the communities we have the pleasure of serving throughout the Commonwealth.

Our investment as this year's Presenting Sponsor further underscores our commitment to the community and salutes The Research Bureau for its exemplary work.

Brian W. Thompson President and CEO Commerce Bank



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"And all the reports on his conduct agree, That, in the modern sense of an old-fashioned word, he was a saint, For in everything he did he served the Greater Community."

"The Unknown Citizen," W. H. Auden



Mark R. Colborn 1948 – 2010

Towering well above six feet with a booming voice and boundless energy and enthusiasm, Mark Colborn was larger than life in any room he entered. His smile was broad and his optimism infectious. But his influence on The Research Bureau went well beyond his commanding presence and captivating demeanor; he had a transformative effect on the organization.

As an ardent supporter of The Research Bureau's mission, a long-time member of The Research Bureau's Executive Committee, and Board Chairman from 2001–2003, Mark was largely responsible for introducing government performance measurement into our repertoire of projects. It was under his watch that we received a seven-year grant from the Alfred P. Sloan Foundation to do this work, which broadened The Research Bureau's product and expertise. After leaving the chairmanship, Mark continued his high level of involvement in the Bureau. He made suggestions on all benchmarking studies and then consulted for us with the towns involved in government performance measurement through the New England States Government Finance Officers Association project. In fact, he worked with us until two months before his untimely death in November. All Research Bureau staff members are grateful for having had the privilege of working with Mark and benefiting from his keen intellect, wise counsel, warmth, and friendship.

A Message from the President and the Chairman of the Board

According to the National Bureau of Economic Research, the recession that rocked the nation's economy officially ended in June, 2009. Its impact, however, is more severe now in the states, cities, and towns across the nation than it was two years ago. A significant reason is that the funds infused into these levels of government from the American Revitalization and Recovery Act (a.k.a. "the stimulus") to cushion them against the recession have all been spent. Since state and local tax revenues have not rebounded as anticipated, these governments must now address the large deficits they would have encountered three years ago at the beginning of the recession. How governments respond to this crisis will determine whether the core services of municipal government can be maintained at a level that taxpayers have come to expect.

This stark reality makes the work of The Research Bureau more important than ever. For many years, the Bureau has been analyzing the delivery of municipal services and identifying unsustainable cost structures. In the pages that follow, we identify some of those issues and the public policies we advocated to address them. We have been able to do this work, which in some cases, has been groundbreaking research, because of two critical factors:

- We have a very small but extremely capable staff that conducts thorough research, writes readable and informative reports, and organizes provocative forums on appealing topics.
- We have had the strong and consistent financial and volunteer support from the local business community, local foundations, and individuals.

We want to take this opportunity to recognize three individuals who had considerable impact on The Research Bureau over many years and who recently passed away. **Mark Colborn** was a giant, not just in physical stature, but in terms of shaping the direction of the Bureau. He was a valued mentor and dear friend to all staff members for more than a decade.

Lois Green was a founding director of the Bureau, a long-time member of the Thomas S. Green Public Service Awards Committee, a staunch supporter of the organization through her foundation affiliations, and a strong advocate of The Research Bureau's work.

Howard Greis, founder and CEO of Kinefac, Inc., was one of the original corporate members of the Bureau, a membership he steadfastly maintained every year. He was also a passionate advocate of

public education, and as a former chairman of the Holden School Committee and former member of the Massachusetts Board of Education, regularly shared his views and experiences to help enhance the Bureau's thinking on the subject.

It seems appropriate here to quote former Research Bureau Board Chairman Brian Buckley from his annual message two years ago:

"The secret of The Research Bureau's success is its ability to forge relationships with diverse constituencies and to collaborate with others who share common goals of revitalizing and restoring prosperity to the Worcester region. Working with city and town officials at all levels, neighborhood associations, public and private agencies, associations, and institutes, The Research Bureau is a respected resource for financially-challenged governments seeking public policy guidance."

We also want to call your attention to the pictorial theme of this year's annual report: regional transportation. As noted in the text that follows, making the greater Worcester region an attractive place to live and work cannot be all about cutting expenditures. The Research Bureau also promotes policies to expand our tax base to give us the capacity to improve services, and hence, the quality of life. Increasing commuter rail, expanding freight rail and airport service, improving public transportation and access to highways all provide opportunities to attract people and businesses to the region. This theme is a reminder of our many studies and forums on transportation issues, which are indicative of the importance of this subject on The Research Bureau's agenda. We are extremely grateful to Carolyn Baltas, who snapped these photos and designed this annual report, as she has done for many years.

Finally, we want to take a moment to acknowledge all who contribute to the success of the Bureau. We extend special thanks to the Bureau's Executive Committee, which spends countless hours setting our agenda and promoting our work. We are also deeply indebted to the Board of Directors, the corporate and foundations communities, and individuals for their support. These contributors as well as those who have provided in-kind services and financial sponsorship of forums and other events are listed at the end of this report. We are extremely grateful to all of them for their generosity. The media coverage, especially from the Telegram and Gazette, is incredibly valuable in extending our reach and educating the public about the issues we research. We again thank our staff members for their boundless enthusiasm, hard work, and commitment to promoting a healthier, more prosperous climate for the region's citizens and businesses.

Our sincerest thanks to you all.

Sandra Dunn

Roberta Rubel Schaefer

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The **Year in Review**

"During my time in the legislature, I relied on the research and analysis provided by the Worcester Regional Research Bureau to make well-informed decisions about how the votes taken on Beacon Hill affect our neighborhoods. As Worcester County Sheriff, I look forward to utilizing The Research Bureau research reports to help improve public safety."

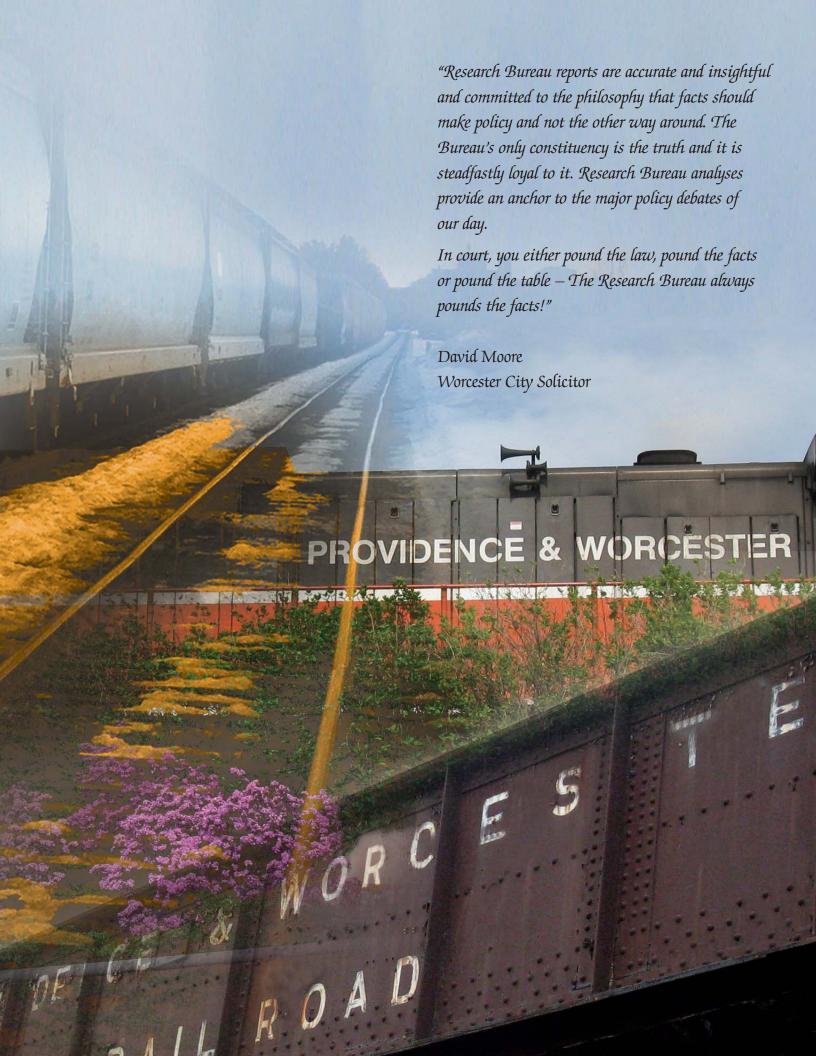
Lew Evangelidis
Worcester County Sheriff

The public policy studies undertaken by The Research Bureau in any given year vary widely – from tax rates to crime rates, from the quality of student performance to the quality of water. In the last few years, however, most of these reports as well as our forums, relate to two overriding themes:

- Is the cost structure of government sustainable over the long term, and if not, what can be done to put it on a more solid foundation?
- How can the academic achievement of students in the Worcester Public Schools be improved?

Of course neither one of these issues is unique to Worcester or to the Commonwealth.

Public employee compensation issues (salaries, pensions and health insurance) and public education reform, are being debated nationally. The two methods The Research Bureau employs, which make our work significant, are first, we look at Worcester as a case study of a larger problem that affects all cities and towns; and second, we collect data from many communities to understand "best practices" that can be replicated in Worcester and elsewhere in the region.



Developing a Sustainable Cost Structure Having a sustainable cost structure for government is critical to its ability to provide the services necessary for residents and businesses to thrive and prosper. Because the City's revenues have not been able to keep pace with the yearly increases in expenditures during the past decade, The Research Bureau began researching the City's cost drivers to determine if any changes were possible.

> Municipal employee health insurance • When The Research Bureau began studying this issue in the early 1990's, health insurance cost \$23.4 million, or 8.5% of Worcester's tax levy budget, considerably higher than the 2-3% expended in the private sector at that time. These data led to our recommendations for changes in public employee premium contributions and plan design to be more closely aligned with private sector benefits and to avoid laying off employees providing services to pay for the benefits of other employees. In FYO6, when the City Manager implemented the first round of increases in employee contributions to premiums, health insurance costs were \$65 million, or 15% of budget, while in the private sector, the national average was 6.5%. During the past five years, in spite of \$100 million in health insurance savings generated through reforms, the City's costs are \$68 million, or 13% of budget. Because health care costs continue to rise, additional reforms are needed. The Commonwealth should grant cities and towns authority to change plan design further without going through collective bargaining the same authority the Commonwealth has with respect to state employees. We also found that Worcester has a \$1.1 billion unfunded retiree healthcare liability. (These totally unfunded liabilities exist in every municipality and state government. The total liability nationally is over \$1 trillion.) A funding schedule should be established for current employees and, for new employees, eliminating this benefit (which is extremely rare in the private sector) should be considered seriously.

Public Employee Pensions • The Research Bureau conducted an analysis of Worcester's retirement system, the benefits and costs, which also contribute to the precariousness and long-term sustainability of municipal service delivery. (Worcester's unfunded liability is currently about \$300 million; The Commonwealth's and its cities and towns are more than \$31 billion.)

Although Worcester's pension system is administered locally, it is governed by state statutes. Therefore, any changes in benefits or addressing abuses must be approved at that level. The pension reform act of 2009 addressed only the most egregious pension abuses that had been regularly reported in the Boston Globe, such as elected officials getting a full year's pension credit for as little as one day of service in that year, or employees qualifying for "out-of-grade" accidental disability pensions because they just "happen to be" serving at a higher rank when the permanently – disabling job-related injury occurred. While the Governor has made proposals for further pension reform, they do not include recommendations to address excessively high rates of accidental disability pensions. Nor do they include restrictions on "group jumping" or "buyback" provisions, which add generously to pensions. These provisions grant unfunded benefit increases, which put considerably more burden on a pension system's funding schedule. All of these benefits increase the City's annual allocation to the retirement system, leaving that much less for municipal services. Several states have begun to transition to a partial defined-contribution plan as well, removing pension systems from the realm of political pressures.

The Research Bureau organized a forum of three public pension experts, who discussed all these issues and educated the attendees on a complicated subject, but a significant cost driver of municipal government.

"As a speaker at several Research Bureau breakfast forums over the years, I have had the opportunity to become familiar with the broader work. Providing a range of expert and scholarly perspectives on important public issues to the political, business, and professional leadership of Worcester and its environs, the forums are only one of the Bureau's many contributions to the City of Worcester and the Commonwealth of Massachusetts. Reports produced by independent and non-partisan research organizations are the foundation for the development of sound public policy in any area, and Worcester is fortunate to have such an organization to rely on."

Sandra Stotsky, Ed.D. Endowed Chair in Teacher Quality University of Arkansas

"I am continually impressed with the quality of research and information The Research Bureau delivers to the region, which contributes to the growth and economic vitality to our communities. For nearly three decades the organization has been a leading regional partner that has helped drive many successful outcomes for both businesses and communities."

Deborah Penta CEO PENTA Communications, Inc. Worcester's Bond Rating • Another factor we have been tracking is the City's bond rating and the ratings agencies' views of the City's fiscal health. These are additional indicators of long-term sustainability of municipal services. While Worcester's and most other cities' bond ratings have remained stable during the current recession, there are a number of factors which indicate that borrowing costs will increase. There is intensifying concern about the underlying fiscal condition of state and local governments because of the extent of unfunded pension and retiree healthcare liabilities and dependence on state aid, all of which severely restrict fiscal flexibility and funding of municipal services. While municipal government has no control over trends in the \$2.4 trillion municipal bond market, which have a substantial effect on borrowing costs, the City does have much more direct influence over other factors which impact its bond rating. These include adhering to sound financial management practices, increasing the level of reserves, and monitoring pension-system funding.

Teachers' Compensation Package and Worcester's Finances •

Part of adhering to sound financial practices means negotiating public employee union contracts that are currently affordable and sustainable in future years. The Worcester School Committee (WSC) has asked the City's 1,900 teachers to pay 25% of the cost of their health insurance premiums (up from 20%) and accept some changes in plan design in order to save about \$3 million in a budget facing a \$6.7 million deficit.

To minimize the impact of this increased cost-sharing, the WSC has offered a \$1,000 increase in base pay to *all* teachers (including those who do not receive health insurance from the school department). However, the School Committee made clear that it would be unable to offer any additional raises to teachers due to the prevailing uncertainty about its finances. The Education Association of Worcester (EAW) has rejected this offer, and instead is demanding an 8.5% raise over the next three years in exchange for the increased health insurance cost-sharing. The negotiations are primarily concerned with fiscal issues, not education policy. The School Committee is not seeking significant concessions on such issues as tenure, pay for performance, or greater principal authority over hiring and firing. These have been the focal points of teacher contract negotiations elsewhere and some were also part of the package of reforms promoted in President Obama's Race to the Top program of which Massachusetts is a recipient.

Based on The Research Bureau's analysis, there are only two conditions under which the WPS could absorb the EAW's proposal: by laying off teachers and/or by assuming that state and local revenues will grow at a higher rate than they have in the recent past, indicating that there would be more new revenue to dedicate to WPS. If the first option is unacceptable to the School Committee because of its impact on the students and the revenue assumption is dubious, then the EAW offer cannot be sustained by the City's revenues.

More recently, Worcester's City Manager has proposed tiered health insurance plan options in conjunction with local providers and similar in cost and plan design to Government Insurance Commission (GIC) plans offered to state employees. If adopted by the unions, the FY12 budget deficits for municipal and school departments could be reduced dramatically. These proposals are fully supported by The Research Bureau and, if rejected by all the unions, will result in 130 layoffs from municipal departments and about 110 layoffs from WPS. (continued)



The Research Bureau also endorses House Speaker DeLeo's proposals to give cities and towns flexibility in establishing plan design without collective bargaining, the same authority currently enjoyed by the state. Because of several years of cuts in local aid, local plan design authority is necessary to sustain municipal services in the Commonwealth's cities and towns.

Tax Policy and Economic Growth • In addition to stressing cost-saving measures to ensure the continued delivery of high-quality services, The Research Bureau is equally concerned with increasing revenues through an expansion of the tax base. That is why we remain firmly committed to gradually transitioning to a single tax rate since the discrepancy between the commercial/industrial and residential tax rates leaves Worcester at a competitive disadvantage compared to towns in the region. In FY11, Worcester's commercial and industrial property tax rate of \$34.65 per \$1,000 of assessed valuation is more than double the residential rate of \$16.06. It is the highest of all nearby towns (Shrewsbury has a single tax rate of \$10.67) and the fifth highest in the entire state. While the Mayor's Task Force on Job Growth and Business Retention (of which The Research Bureau was a member) recommended movement toward a more equal tax rate, and the City Council provided modest relief to businesses by not voting for the highest tax rate for them and the lowest rate for homeowners in FY11, the City Council needs to continue on this path if it expects to attract and retain businesses.



"This year The Research Bureau, under Roberta Schaefer's continuing inspired leadership, has continued, via its publications and public forums, to promote informed debate and improved decision making about the policy issues that have a direct impact on the daily lives of the citizens of Central Massachusetts. It is a highly important and entirely free service (thanks to the generosity of local businesses and foundations) that is of great value to our community."

Dennis Berkey, Ph.D. President WPI

Public education is unlike most municipal services "
for which the results are fairly visible"
extinguishing fires are in "
education" Public education is unlike most municipal services that are done on a regular basis and for which the results are fairly visible: snow removal, trash collection, criminal arrests, and extinguishing fires are in that category and very important for our quality of life. Public education, however, is an investment in our future citizens and workforce. The results may not be visible for years, but it is a serious responsibility that cannot be postponed and has

In 2010, 36 of Worcester's 44 schools, enrolling 84% of the District's students, were identified as schools in need of improvement, corrective action, or restructuring based on their inability to demonstrate AYP (Adequate Yearly Progress under the provisions of the Federal No Child Left Behind Act) in ELA, math, or both, in the aggregate or in subgroups. Twenty-seven schools have been identified for restructuring, including all four of Worcester's middle schools and all four comprehensive high schools. That is why over the past few years, The Research Bureau has issued several reports and organized a number of public forums highlighting successful school models. These schools include the following characteristics:

- principal authority to select and assign staff to positions without regard to seniority;
- principal control over financial resources;
- a system to provide detailed tracking and analysis of assessment results and uses those results to inform curriculum, instruction, and individual interventions;
- daily after-school tutoring;
- longer school day and summer school classes;
- regular evaluation of faculty for content knowledge and performance tied, in part, to growth in student learning;
- a school culture, that is, a set of core beliefs and expectations that are internalized to the point that they guide actions and reactions by both staff and students alike.

These characteristics are found in charter schools, pilot schools (in-district charter schools) and in traditional schools such as University Park Campus School. These kinds of changes were also supported by the Obama administration and considered in determining eligibility for its "Race to the Top" program. Some are part of the state's 2010 Achievement Gap Act. Each year, The Research Bureau issues a report that examines student, school, and district performance in relation to the standards implemented under the Massachusetts Education Reform Act of 1993 and the Federal No Child Left Behind legislation signed into law in 2002 in an effort to improve student achievement and to close the achievement gap between subgroups of students (e.g., racial and ethnic minorities, students with limited English proficiency, and students with disabilities).

This year, we also organized two programs addressing student achievement: one discussed the body of research which shows the decisive connection between teacher quality and student achievement, and the significance of subject-matter knowledge as a critical indicator of teacher quality. The second program was a screening of the documentary Waiting for Superman, followed by a panel discussion that included the principals of Brockton High School (a large traditional urban school) and Roxbury Prep Charter School, both of which have succeeded in raising student achievement and closing the minority achievement gap using the principles mentioned above. We are pleased that the WPS has developed proposals for five innovation (similar to pilot) schools that incorporate some of these same principles. The Research Bureau will monitor the progress of these schools and publish our findings.



September 22, 2010 Annual Meeting

Celebration of the 25th Anniversary of The Research Bureau – Lisa Mancini, Senior Vice President, CSX – featured speaker







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The Investing in Girls Alliance

The Research Bureau has been engaged by the Investing In Girls Alliance (IIG), a project of the Women's Initiative of United Way of Central Mass, to conduct a new needs assessment. The Alliance was established in 2007 to improve services for middle-school girls in Central Massachusetts through research, education, advocacy, and collaboration. Following a six-month needs assessment, the Alliance developed a strategic plan through the year 2011. The plan's purposes include the following:

- build the capacity of its member organizations;
- engage a wide range of constituencies in efforts to improve services for girls;
- improve access to information about girls and girls' programs;
- raise public awareness of the unique strengths, needs, experiences, and perspectives of girls;
- collectively advocate for girls' needs among legislators and policymakers.

With funding from the Fred Harris Daniels Foundation and United Way, the IIG spent the last three years implementing strategies and programs related to the Alliance's mission. The Research Bureau will update the needs assessment through surveys of middle school girls, parents, service providers, and focus groups. These surveys will provide sufficient data for the Alliance to set its priorities for the next three years and to benchmark progress every three years thereafter.

New England States Performance Measurement Project

The Research Bureau is now completing a three-year pilot program working with several New England communities to collect and analyze timely, accurate, and reliable data on selected government services. This project provides municipal officials with data to inform their decisionmaking, while its regional nature enables them to share views on best practices. Through regular meetings, municipal officials have the opportunity to learn about what is working well in other communities and thus how to enhance service delivery in their own community. The town governments have measured fire, dispatch, and rescue services, and snow and ice removal services using templates developed by The Research Bureau. They have also administered a citizen satisfaction survey developed and analyzed by The Research Bureau, which was administered in two successive years. More recently, a number of other towns have joined the project to administer the citizen satisfaction survey. The Bureau plans to offer the survey as a regular Research Bureau project to any interested community on a fee-for-service basis. For those interested in participating, please contact us by phone or email.

During the final phase of the project, we are collecting and analyzing data from participating towns on the various fees charged by them for services, licenses, and inspections. The purpose is to understand the significance of these revenues for municipal operations, how they are collected, and how they compare to their peers in terms of costs and citizen satisfaction. The project has been supported by the New England States Government Finance Officers Association, the Alfred P. Sloan Foundation, and participating towns.

Top Ideas for Revitalizing Cities Howard Husock February 25, 2010



Investing in Urban Resurgence: Transportation and Infrastructure Edward Glaeser April 28, 2010



Demographic Transformation of American Cities Alan Ehrenhalt May 18, 2010



Teacher Quality as a Civil Rights Issue Sandra Stotsky October 27, 2010



How Immigrants Impact Cities
Jason Riley
December 7, 2010



To commemorate the 25th anniversary of The Research Bureau,

we sponsored five free breakfast forums spaced throughout 2010, focusing on the overall theme of Cities: Mapping the Road to Success.

All events featured a lecture by a prominent scholar or public policy expert, followed by a question and answer period.



Other Forums and Events

Thomas S. Green Public Service Awards

Each year, The Research Bureau recognizes the "unsung heroes" in municipal government who are committed to making Worcester and nearby communities better places to live and work. The 2011 Thomas S. Green Public Service Awards recipients, who were honored at a ceremony and reception at Assumption College, are as follows:

Ronald Brown
Louise Clarke
John Mahan









Board of Directors Meeting January 27, 2011

featured speaker Greg Bialecki,
 Massachusetts Secretary
 of Housing and Economic Development



Forums

Cutting State & Local Budgets: How sharp are the scissors?

 featuring panelists Jay Gonzalez, Michael O'Brien and James Purcell. Moderated by David Forsberg March 3, 2011

Superman or Supersystems?

Screening and discussion of the 2010 documentary on public education reform,

Waiting for Superman – co-presented with the

College of the Holy Cross

April 13, 2011



Public Employee Pensions: Is the current system sustainable?

– co-presented with Rappaport Institute for Greater Boston

May 11, 2011

2010 - 2011 Reports

Benchmarking Public Education in Worcester: 2010

Benchmarking Economic Development in Worcester: 2010

Teachers' Compensation Package + Worcester's Finances = Do They Add Up?

Downtown Worcester Office Occupancy: 2010 Survey

Worcester's Bond Rating and the Recession:

What's the City's Credit Score?

Benchmarking Municipal & Neighborhood Services in Worcester: 2011 EPA Stormwater Regulations in Worcester: Will Ratepayers be Drained?



The Research Bureau Annual Meeting Speakers

2011 Senator Scott Brown

2010	Lisa A. Mancini, Senior Vice President,
	CSX Corporation

- 2009 Amity Shlaes, Bloomberg News Columnist, Political Economist
- 2008 John W. Rowe, Chairman, President, and Chief Executive Officer, Exelon Corporation
- 2007 Dr. Thomas Payzant, former Superintendent of the Boston Public Schools and Senior Lecturer at the Harvard Graduate School of Education
- 2006 Dr. David Driscoll, Commissioner of Education, Commonwealth of Massachusetts
- 2005 Tamar Jacoby, Author and Senior Fellow at the Manhattan Institute
- John Gannon, Staff Director,U.S. House of Representatives,Select Committee on Homeland Security
- 2003 Governor Mitt Romney, Commonwealth of Massachusetts
- 2002 Fred Siegel, Professor of History, The Cooper Union for the Advancement of Science and Art, New York City, and Senior Fellow, Progressive Policy Institute
- 2001 Heather MacDonald, Senior Fellow, The Manhattan Institute
- 2000 Rev. Dr. Floyd H. Flake, Senior Pastor, Allen African Methodist Episcopal Church and former U.S. Representative to Congress

- 1999 Howard Husock, Director of Case Studies in Public Policy and Management, Kennedy School, Harvard University
- 1998 Myron Magnet, Editor, City Journal
- 1997 Thomas Birmingham, Senate President, Commonwealth of Massachusetts
- 1996 Glenn C. Loury, Professor of Economics, Boston University
- 1995 Peter Harkness, Editor and Publisher of Governing
- 1994 James Q. Wilson, Author and Professor of Political Science, UCLA
- 1993 Robert Poole, President, Reason Foundation
- 1992 William Hudnut, former Mayor of Indianapolis
- 1991 David P. Forsberg, Secretary, Executive Office of Health and Human Services, Commonwealth of Massachusetts
- 1990 Bruce Carnes, Director of Planning and Budget, Office of National Drug Control Policy
- 1989 Edward J. Logue, CEO, Logue Boston, former Director of the Boston Redevelopment Authority
- 1988 Raymond Flynn, Mayor of Boston
- 1987 William Bulger, Senate President, Commonwealth of Massachusetts
- 1986 Ira Jackson, Commissioner,
 Department of Revenue,
 Commonwealth of Massachusetts



2010 - 2011

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