

# ANNUAL REPORT

## MAKING IT COUNT

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# The Research Bureau

[www.wrrb.org](http://www.wrrb.org)



## ***Commerce Bank proudly supports The Research Bureau's outstanding work.***

Since 1955, Commerce Bank's single mission has been to support the growth and vitality of communities in Central Massachusetts.

What makes us excel in this mission is our adherence to core principles and an ability to deliver the innovative products, services and capabilities our customers need and deserve. As a result, Commerce Bank has been voted Wachusett Region's Best Community Bank in 2013 and Best Bank in Worcester County in 2014 by the *Holden Landmark* and *Worcester Magazine*, respectively. Commerce has also received the highest rating from BauerFinancial and was named a Blue Ribbon bank by Veribanc®.

As part of our continued commitment to local communities, we are proud to support The Research Bureau in its efforts to research public policy issues and maintain its position as a leading source of information for government, business and society.

Our investment as this year's Presenting Sponsor emphasizes this commitment and supports The Research Bureau's dedication to outstanding work and collaboration.

Brian W. Thompson

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## CHAIRMAN OF THE BOARD AND EXECUTIVE DIRECTOR

### Dear Friends of The Research Bureau:

Great organizations are dynamic, adapting to new challenges and embracing new opportunities. The Research Bureau is no exception. 2014 marks an exciting evolution in our organization as we say a fond farewell to long-time executive Roberta R. Schaefer, whose passion, dedication, and steadfast leadership served this organization well since its founding in 1985. With a new executive director, we are reviewing our many accomplishments, identifying an approach to address the issues that continue to impact our region's growth, and laying the groundwork for new initiatives. As we complete our evaluation, we see a strong and purposeful organization poised to capitalize on its opportunities to promote good governance in Greater Worcester.

The Research Bureau has a well-earned reputation as a respected advocate of responsible government and a resource for financially-challenged municipalities seeking public policy guidance. For nearly thirty years, The Research Bureau has worked to protect the public interest in Greater Worcester by identifying issues, investigating impacts, and educating the public and government officials of opportunities and best practices. As in the past, you can count on us for solid, steady, and thoughtful analysis of local and regional public policy issues and sensible recommendations for adoption and implementation by our public officials. The Bureau will continue to be fearless addressing difficult issues such as establishing an equitable tax system, managing municipal resources and assets, controlling public employee pension and health insurance costs, enhancing the region's transportation network, and strengthening the public schools. We will be a loud voice for excellence in government and in public policy.

Yet we will also embrace new opportunities. The Research Bureau, whose history and mission represent a private commitment to public excellence, will work proudly to build a robust society from both the ground up and the top down. We will challenge not only our public leadership but our private leadership to find ways to work together to create a strong community. The Research Bureau looks to expand its reach to explore how government, residents, businesses, and not-for-profits collaborate to build a healthy, vibrant society. In a period of limited resources and growing demands, all stakeholders must be engaged and committed to Greater Worcester's success. We must find ways to develop a shared vision, increase citizen involvement, generate private investment, and leverage public and private coordination to the betterment of all.

Thank you to all who contribute to The Research Bureau's success. We especially appreciate the dedication of our Executive Committee and our impressive Board of Directors who give time, money, and insight to keep the organization moving forward. We highlight the contributions of

Greenberg, Rosenblatt, Kull & Bitsoli, P.C., our accountants, and Penta Communications, Inc., for their significant efforts on our behalf. We also thank those Board members who have stepped down over the past year. We appreciate their diligent efforts on behalf of The Research Bureau and we look forward to working with them in new ways in the future. We are deeply grateful to the corporate and foundation communities, as well as individual supporters, who provide valuable resources to further good public policy in Worcester. All of these contributors are listed at the end of this report. We give great thanks to the Worcester media, especially to the *Telegram and Gazette*, which is instrumental in expanding our audience and educating the public about the issues of good governance. Finally, we thank the dedicated staff of The Research Bureau for their enthusiasm, diligence, and commitment to building a healthy and successful region.

We would be remiss if we did not highlight the passing of one of our own. Robert Nemeth – reporter, editorial writer, and columnist at the *Telegram & Gazette* – was a key supporter of The Research Bureau. A member of the Board since 2000, Robert was a strong proponent of good government and a valuable ally in our efforts to promote best practices. His columns were a must-read for those interested in issues of governance in Worcester and will be missed.

On behalf of The Research Bureau, we look forward to the opportunities, and the challenges, of 2014 and we look forward to your ongoing partnership in the months and years ahead.



*Karen E. Duffy*

**Karen E. Duffy**  
*Chairman of the Board*



*Timothy J. McGourthy*

**Timothy J. McGourthy**  
*Executive Director*

# MAKING IT COUNT

In 2014, The Research Bureau continues to count. Since our founding in 1985, we have identified issues, uncovered facts, analyzed data, and made recommendations based on national best practices. Local government has limited resources to tackle a vast array of disparate issues. At The Research Bureau, we spend our time counting, immersed in numbers and statistics, so that we can be counted on to provide quantifiable data, analyses of highlights and trends, and innovative examples of programs and policies. The Research Bureau is generously supported by local foundations, businesses, and individuals so that all citizens can share a common understanding of the things that count.



#29

For 29 years, The Research Bureau has served the public interest of Greater Worcester by conducting independent research and analysis of public policy issues to promote informed public debate and decision-making.



#220

The Research Bureau has released over 220 reports, briefs, and other publications to ensure informed, fact-based decisions on governmental policies of note.



#200

Since its founding, The Research Bureau has presented nearly 200 free programs open to government officials and the public. Panelists have included prominent individuals at the national, state, and local level with expertise on topics critical to the future of Greater Worcester.

### *Worcester by the Numbers*

Over the past year, The Research Bureau has prepared a number of reports in our new *Worcester by the Numbers* series. The new series serves as a data commons for Greater Worcester. In the past year, we released reports dealing with land use, housing, public education, the economy, and jobs. Along the way, we made a few interesting discoveries:

- While the second largest city in New England, Worcester has the second lowest population density among the seven major cities in the region.
- Worcester's home-ownership rate is 46.6%, significantly lower than the national average of 66.1% but higher than all but one of its seven regional counterparts.



- 51% of Worcester's households are paying more than 30% of their incomes on rent, however that is the lowest rate of New England's largest cities.

- More than 88% of the parcels of land in Worcester are used for residential purposes, yet that translates into only 46% of land area. More than 35% of Worcester's land area is tax exempt.

- An average of 96,671 people were employed in the City of Worcester, a decrease of more than 4% over the previous decade, yet the number of employment establishments rose by nearly 18% to 5,093.

- Worcester employment in educational and health services and manufacturing exceeds the national average.

In the coming year, The Research Bureau looks to build on *Worcester by the Numbers* to create a virtual almanac to track changes in key statistics over time in order to identify trends and public policy issues.

### Keeping an Eye on the Bottom Line

An integral part of The Research Bureau's mission is its review of the City of Worcester's finances. In addition to its regular analysis of funding for both the City and the Worcester Public Schools, The Research Bureau recently focused on a topic of national significance – the impact of post-employment benefits (OPEB) on annual budgets. In 2011, for the first time ever, the City had more retirees than active workers, with most looking to the City for a contribution toward health insurance. The City began 2013 with an unfunded OPEB liability of \$656 million, more than twice its pension obligation. According to the Massachusetts Municipal Association, without a viable plan, fully one-third of Worcester's revenue will go toward retiree benefits by the year 2020. In *A Prescription for Retiree Health Care*, The Research Bureau recommends:



*“Data that informs key decisions enable organizations like Quinsigamond Community College to make shrewd investments in the Greater Worcester community. The Research Bureau's informational reports often enable us to better assess the community's needs, strengths and opportunities as we plan our best strategies for future direction and growth.”*

Gail E. Carberry, Ed.D. | President | Quinsigamond Community College

### MAKING IT COUNT *(continued)*

- The City Council should follow through on former City Manager Michael V. O'Brien's recommendation to aggressively fund the City-managed trust for OPEB.
- The City should pursue bold reforms to its existing catalogue of retiree benefits, including reducing the portions of premiums it pays for retirees and their spouses, pro-rating benefits based on length of service and hours work, and tightening eligibility requirements where appropriate.
- The new City Manager should explore and encourage the creation of retiree medical trusts (RMTs) managed by workers' associations, which would enable workers to have a tax-free vehicle for both the worker and the City to fund healthcare expenses in retirement.
- The City should craft a plan and timeline for implementation of improvements to ensure that current retirees and those soon to retire are not financially impacted by a sudden change in long-promised benefits.

#### The Student Equation: The Common Core

In 2014, The Research Bureau joined the national debate over the Common Core State Standards Initiative – national educational standards adopted by the Commonwealth of Massachusetts and 43 other states. The Common Core State Standards lay out the knowledge and skills that a student should possess at each stage in his or her kindergarten through 12th grade (K-12) education. These standards are designed to ensure that high school graduates are "...prepared to succeed in entry-level careers, introductory academic college courses, and workforce training programs." In 2014, the two primary assessment systems for testing mastery of the Common Core – the Partnership for Assessment of Readiness for College and Careers (PARCC) and the Smarter Balanced Assessment Consortium (SBAC) – are completing field testing and analysis of the initial pilot runs. Despite early wide-spread state support and adoption, the Common Core has inspired significant outcry. Concerns range from the quality of the content to the cost of implementation to the role of testing in measuring student, teacher, and school performance. The Research Bureau's report, *Toward a Common Understanding of the Common Core*, analyzes the arguments raised against the Common Core and offers a factual basis for review. The report endorses the Common Core, but makes a number of recommendations for improving the implementation of the revised Massachusetts Curriculum Frameworks based on the Common Core and the implementation of the PARCC tests, including:

*"Informed decision-making is the hallmark of a thriving community. Of course, information must be easily accessible, timely, well-documented, unbiased and clearly presented, in order to be useful. It is precisely this critical function that The Research Bureau fulfills so well for us."*

Janice "Jan" B. Yost, Ed.D. | President. | *The Health Foundation of Central Massachusetts, Inc.*



- Maintaining Massachusetts-based standards for subjects beyond English language arts and mathematics;
- Augmenting the PARCC exams to include Massachusetts-specific standards;
- Establishing a state-wide capital plan for upgrading technology and facilities to accommodate the online PARCC tests;
- Incorporating computer and typing modules into school curriculum to ensure student familiarity with the testing format;
- Continuing distribution of student test results to school districts and parents to ensure constructive learning from the testing itself;
- Reconsidering the timeline for measuring student, teacher, and school achievement based on PARCC assessments to accommodate the challenge of implementation of the new standards and systems; and
- Formalizing a clear timeline for review and revision of the new standards based on Massachusetts' experiences.



# MAKING IT COUNT *(continued)*

### Starting At #1

The Research Bureau released *Bureau Brief – The City Manager Search Process* to support the City with its efforts to recruit a new City Manager. The Worcester City Council is engaged in arguably its most important responsibility with efforts to identify and hire a replacement for prior City Manager Michael V. O'Brien and temporary City Manager Edward M. Augustus, Jr. As the City initiates its recruitment effort, The Research Bureau offered its review of best practices and insights from the experts.

- Define the position and the expectations – The City Council must clearly identify the City's needs and the position's responsibilities.
- Recruit candidates from a wide talent pool – A large and diverse talent pool increases the odds of a successful City Manager search.
- Evaluate candidates and narrow to finalists – The City Council must rigorously review applications, screen candidates, and undertake preliminary reference checks before narrowing the field to a smaller set of five to ten finalists.
- Select City Manager and negotiate contract – The City Council must establish in advance the parameters of its offer to the top candidate. Issues of leadership, confidentiality, and communication with the public must be key considerations as the process reaches its completion.



## The Research Bureau prepared the following reports:

Worcester by the Numbers: Housing and Land Use – August 2013

Questions for the 2013 Candidates for City Council and School Committee in Worcester – October 2013

Worcester by the Numbers: Public and Charter Schools – January 2014

Bureau Brief—The Common Core State Standards – April 2014

Bureau Brief—The City Manager Search Process – May 2014

Toward a Common Understanding of the Common Core – May 2014

## The Research Bureau organized the following forums:



# Manufacturing the Future in Central Mass – October 2013 – Co-presented with the Worcester Regional Chamber of Commerce and with the generous assistance of Fallon Community Health Plan and Rand Whitney

# Careers in Advanced Manufacturing: It's not your grandfather's assembly line – October 2013 – Co-presented with Assumption College and with the generous assistance of Rand Whitney



# OPEB (Other Post-Employment Benefits): How Cities Can Keep Commitments to Public Employees Without Declaring Bankruptcy – November 2013 – With the generous assistance of Hanover Insurance Group

# Is Transportation an Economic Development Engine for Central Massachusetts? – December 2013 – Co-presented and with the generous assistance of Massport



*"In a constantly changing landscape, the role of The Research Bureau is critical now more than ever. Providing in-depth insight on issues impacting the Worcester region, The Research Bureau keeps government, business and community leaders informed on the most relevant issues. Access to this information is vital as it allows for more a robust dialogue and a more informed public."*

Tom McGregor | Regional Executive, Commercial Banking | Santander

JUNE 5, 2013

28th

ANNUAL  
MEETING

OF THE  
RESEARCH  
BUREAU



with Featured Speaker  
**EDWARD GLAESER**  
*Fred and Eleanor Glimp Professor  
of Economics, Harvard University*





*“With the cutback in local government resources and with the change in the newspaper industry as a result of the Internet, today there is a lack of public policy analysis. The Worcester Regional Research Bureau fills this void by conducting forums and issuing reports on matters of public interest in the Worcester metropolitan area. As a democracy, it is critical that citizens be informed on issues and be given sufficient background in order to make informed judgments. The presence of a research bureau in Worcester is, therefore, a key activity in our community.”*

**D.M. Moschos**  
**Mirick O’Connell**

## 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 2014 Thomas S. Green Public Service Award recipients, honored at a ceremony and reception at Assumption College on March 26, 2014, were as follows:

# **Sandra Borbone**  
*Worcester Technical High School*

# **Paula Harrity**  
*Worcester Public Schools*

# **Julie Lynch**  
*Worcester Department of  
Public Works and Parks*

# **Kathleen Donovan**  
*City of Worcester Inspectional Services*

# **Jessica Jacques**  
*City of Worcester Cable Services*



## Forums & Board of Directors Meetings

# **September 18, 2013**  
Featured speaker  
**Timothy Murray**  
*President, Worcester Regional  
Chamber of Commerce*

# **February 4, 2014**  
Featured speaker  
**W. Patrick Hughes**  
*President, Fallon Health*

# **April 14, 2014**  
**Executive Committee**  
**Strategic Planning Session**  
*Goddard-Daniels House, AAS*



# ANNUAL MEETING

## SPEAKERS



- |  |  |
|--|--|
| <p><b>2014</b> Jay Ash, City Manager of Chelsea<br/>Bernard F. Lynch, Founder,<br/>Community Paradigm Associates, LLC<br/>Michael V. O'Brien, Executive Vice President,<br/>Winn Development</p> <p><b>2013</b> Edward Glaeser, Fred and Eleanor Glimp Professor<br/>of Economics, Harvard University</p> <p><b>2012</b> Eric S. Rosengren, President &amp; CEO,<br/>Federal Reserve Bank of Boston</p> <p><b>2011</b> Senator Scott Brown</p> <p><b>2010</b> Lisa A. Mancini, Senior Vice President,<br/>CSX Corporation</p> <p><b>2009</b> Amity Shlaes, Bloomberg News Columnist,<br/>Political Economist</p> <p><b>2008</b> John W. Rowe, Chairman, President &amp; CEO,<br/>Exelon Corporation</p> <p><b>2007</b> Dr. Thomas Payzant, former Superintendent<br/>of the Boston Public Schools and senior lecturer<br/>at the Harvard Graduate School of Education</p> <p><b>2006</b> Dr. David Driscoll, Commissioner of Education,<br/>Commonwealth of Massachusetts</p> <p><b>2005</b> Tamar Jacoby, Author and Senior Fellow at the<br/>Manhattan Institute</p> <p><b>2004</b> John Gannon, Staff Director,<br/>U.S. House of Representatives,<br/>Select Committee on Homeland Security</p> <p><b>2003</b> Governor Mitt Romney,<br/>Commonwealth of Massachusetts</p> <p><b>2002</b> Fred Siegel, Professor of History,<br/>The Cooper Union for the Advancement of<br/>Science and Art, New York City, and<br/>Senior Fellow, Progressive Policy Institute</p> | <p><b>2001</b> Heather MacDonald, Senior Fellow,<br/>The Manhattan Institute</p> <p><b>2000</b> Rev. Dr. Floyd H. Flake, Senior Pastor,<br/>Allen African Methodist Episcopal Church and<br/>former U.S. Representative to Congress</p> <p><b>1999</b> Howard Husock, Director of Case Studies<br/>in Public Policy and Management,<br/>Kennedy School, Harvard University</p> <p><b>1998</b> Myron Magnet, Editor, City Journal</p> <p><b>1997</b> Thomas Birmingham, Senate President,<br/>Commonwealth of Massachusetts</p> <p><b>1996</b> Glenn C. Loury, Professor of Economics,<br/>Boston University</p> <p><b>1995</b> Peter Harkness, Editor and Publisher<br/>of Governing</p> <p><b>1994</b> James Q. Wilson, Author and<br/>Professor of Political Science, UCLA</p> <p><b>1993</b> Robert Poole, President, Reason Foundation</p> <p><b>1992</b> William Hudnut, former Mayor of Indianapolis</p> <p><b>1991</b> David P. Forsberg, Secretary, Executive Office<br/>of Health and Human Services,<br/>Commonwealth of Massachusetts</p> <p><b>1990</b> Bruce Carnes, Director of Planning and Budget,<br/>Office of National Drug Control Policy</p> <p><b>1989</b> Edward J. Logue, CEO, Logue Boston,<br/>former Director of the Boston Redevelopment<br/>Authority</p> <p><b>1988</b> Raymond Flynn, Mayor of Boston</p> <p><b>1987</b> William Bulger, Senate President,<br/>Commonwealth of Massachusetts</p> <p><b>1986</b> Ira Jackson, Commissioner,<br/>Department of Revenue,<br/>Commonwealth of Massachusetts</p> |
|--|--|

# TELEGRAM & GAZETTE

Worcester, Mass

IN OUR OPINION

September 16, 2013

## Integrity over time

Few organizations are defined by one person, and those that are often run the risk of straying from their mission. In Roberta R. Schaefer and The Research Bureau, Worcester has been blessed with a wonderful exception to that rule. Since its founding in 1985, The Research Bureau has been led by Ms. Schaefer, whose energy, vision, grace and, yes, strong opinions, have given direction, purpose and bite to scores of reports, dozens of public forums, and hours of invaluable testimony on legislative matters great and small.

Few cities of Worcester's size enjoy a truly independent voice whose sole purpose is public policy research. For 28 years, The Research Bureau has been exactly that, an independent voice for sifting and making sense of demographic information, business trends, tax policy, and the impact of ideas and mandates, whether coming from City Hall, Beacon Hill, or beyond.

To be sure, Ms. Schaefer has not worked alone. She has been ably assisted by staff and steadfastly supported by her executive board. But her leadership has been the essential ingredient for the Bureau's success, which consists in the independence of its findings, and its continuing role as a convener of the best and brightest speakers and thinkers on economics and civic issues affecting Worcester.

Playing the role of fact finder — no matter where those facts lead — does not always ensure popularity, and is a sure invitation to criticism from one quarter or another. But those who take the time to read the reports produced by The Research Bureau, or attend its public forums and annual meetings, while they may disagree, can hardly help but respect the integrity of its work, and the quality of its leadership.

We wish Ms. Schaefer well as she retires — to a very active life with her family and many other interests. May the organization she has nurtured for nearly three decades continue to serve Worcester with the independence and vision for which it is widely known.

# TELEGRAM & GAZETTE

Worcester, Mass

IN OUR OPINION

December 13, 2013

## **McGourthy good choice to succeed Schaefer**

Timothy J. McGourthy last week became the latest official to announce he's leaving the city's employ.

Worcester's well-regarded chief economic development officer will take over the reins of The Research Bureau when its longtime president and CEO Roberta R. Schaefer retires in February.

A gifted and enthusiastic urban planner, Mr. McGourthy will bring a wealth of firsthand experience to his new job, and a close understanding of the inner workings of Worcester and its vision for the future.

More sweeping in scope than the municipal roles he's performed, Mr. McGourthy's post at The Research Bureau will shift him into a valuable advisory role for the city and region.

Since its founding in 1985, The Research Bureau has built a tradition of regularly providing leaders and citizens reliable, factual, clearly presented guidance on a host of local issues. Nonprofit and nonpartisan, it issues detailed reports and holds forums on such public policy topics as finance, education, public administration, demographics, and quality of life.

The Bureau, ably led since its beginning by Ms. Schaefer, will be in good hands when she steps down.

Although Mr. McGourthy will be calling City Hall occasionally as part of his new job, it's not yet known who will be answering some of the phones. City Manager Michael V. O'Brien tops the list of a roster of departures ahead in the city administration.

Worcester is lucky that in the case of Mr. McGourthy, he's not going far. As chief executive of The Research Bureau, he will still be looking out for the city's long-term economic health, stability, and livability.

There's a lot of work ahead in Worcester, as Mr. McGourthy knows from his seven years with the city. The Research Bureau will continue to help ensure that the work is done right.

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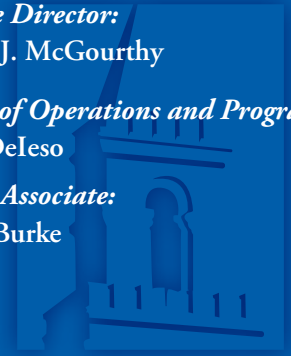
Timothy J. McGourthy

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Worcester Regional Chamber of Commerce  
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### Research Assistant

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Grimes & Company, Inc.  
Honey Farms  
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John Spillane  
Peter Stanton  
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Robert Vaudreuil  
Mark Waxler  
Steven Willins  
Janice Yost

### In-Kind Gifts

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