

The Research Bureau

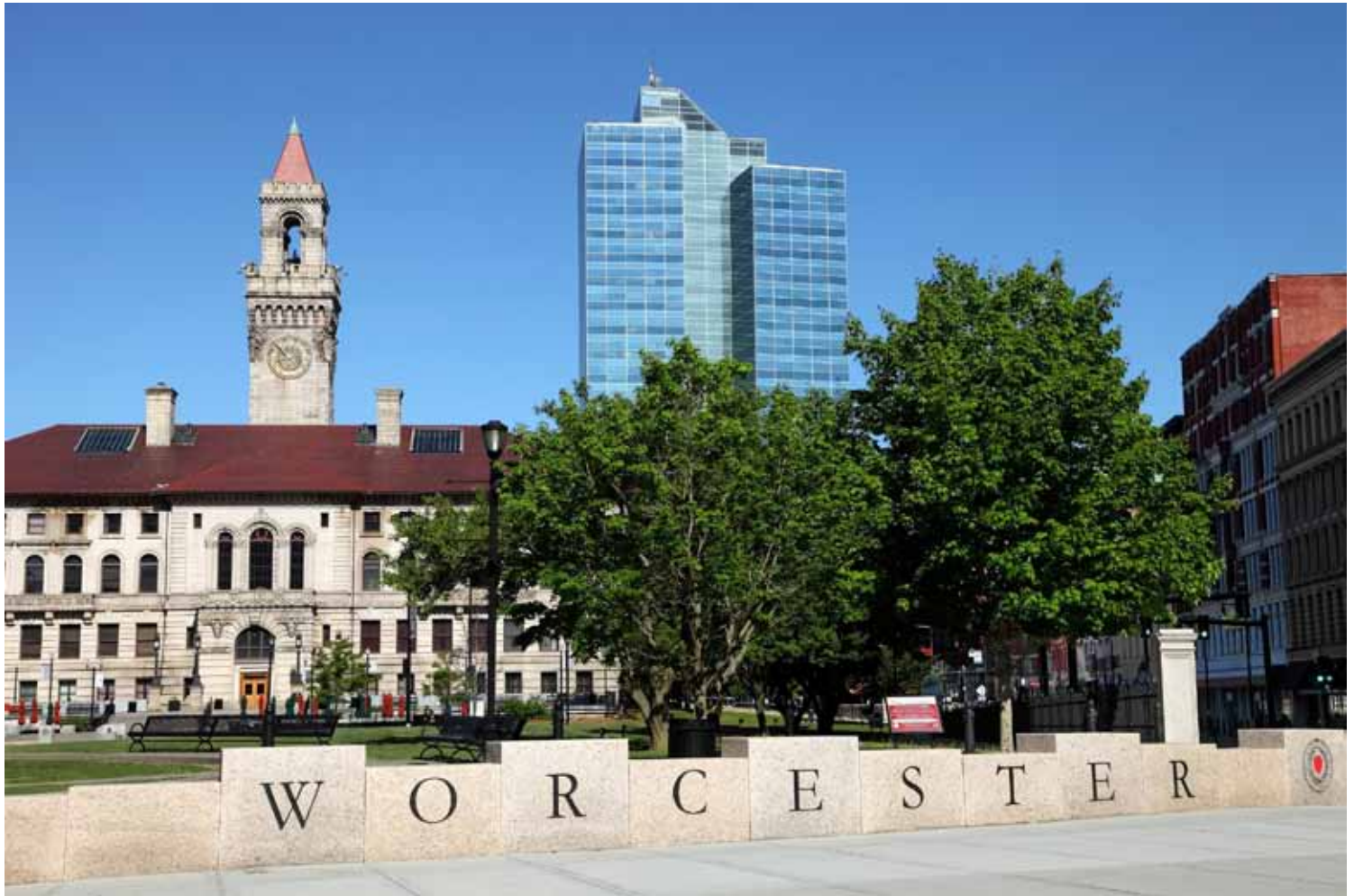
2017 ANNUAL REPORT

OF THE RESEARCH BUREAU

BUILDING ON A STRONG FOUNDATION

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



The Research Bureau has long served Greater Worcester by promoting informed public debate and decision-making through independent research and analysis. This important service is a vital asset to our communities, and Commerce Bank is proud to support The Research Bureau as the Presenting Sponsor of this year's 32nd Annual Meeting.

Like the Research Bureau, Commerce Bank is committed to helping people and businesses thrive, and we are pleased to offer the innovative products, services and solutions that build a strong, successful region.

Commerce Bank remains proud to stand in support of The Research Bureau. As Presenting Sponsor, our continued support underscores our commitment to the communities we serve and salutes The Research Bureau's exemplary work.

Brian W. Thompson

President and Chief Executive Officer
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DEAR FRIENDS OF THE RESEARCH BUREAU,

In Aristotle's *Politics*, he famously argued that anyone unable to work within society, who rejected the value of community, was "...either a beast or a god." To the Greeks, the *polis* was the heart of society. It was the genesis for both personal and cultural growth.

Worcester is our *polis*. Over the centuries, Worcester has both been defined by and defined its residents, from the early farmers struggling to eke out a living in the wilderness, to the manufacturers building products used across the country, to the knowledge creators – academics and medical experts – expanding understanding across the globe. Worcester has constructed itself and then reconstructed itself to serve the needs of its residents and its industries. We have strong foundations, but those foundations are always and necessarily changing.

In our democratic system, government is an expression of that society. Government represents our efforts to identify shared goals and devise common solutions. As Worcester looks to rebuild its downtown and neighborhoods, promote its public schools, ensure public safety and health, and lay the groundwork for future success, municipal government, with all of its quirks, contradictions, and challenges, is a vital and necessary partner.

We are neither beasts nor gods in Worcester. In many ways, we live according to a higher standard – a community standard. In this time of national debate, we seek engagement but challenge ignorance. We fight to protect free speech but call for responsible discourse. We argue on behalf of values but respect reasoned compromise. We call for independence but acknowledge obedience to the law. Importantly, we want government to be focused and effective, but also reflective of the diverse views that make up our community.

The Research Bureau works hard to promote informed decision-making and public debate by providing outstanding independent research and analysis on policies and issues affecting Greater Worcester. Our goal is

to make sense of sometimes senseless debate. We have used data, analysis, and insight – both ours and others' – to ensure that the foundation of decision-making in this region remains strong.

Over the past year, we have continued to fulfill our mission to build on the foundations and ensure an ever stronger framework of local governance. We have highlighted the importance of education to communal social and economic well-being through our work on the Worcester Public Schools strategic planning initiative. We have outlined a holistic approach to taxes with our review and recommendations on the dual tax rate and tax incentives. We have called for careful budgeting and financial management with an awareness of our growing liability caused by post-employment obligations. We have provided a framework for public policy issues across the spectrum with the release of our third annual *Worcester Almanac*.

As a result, Greater Worcester, too, is succeeding. Our localities are building on their own strong foundations. Our city is growing, our towns are thriving, and our people are seeing new economic, educational, and community opportunities. We are seeing investment – public and private – that is making Central Massachusetts an ever more attractive place to live, work, and visit.

Thank you to those who serve as the intellectual and financial foundation for our efforts. Your contributions are essential to our work and reflect on your commitment to civic vibrancy. Thank you to our dedicated Executive Committee, our eminent Board of Directors, and our stalwart followers who ensure that we put forward timely and insightful information that lays the bricks of our region's future. We highlight the incredible contributions of Greenberg, Rosenblatt, Kull & Bitsoli, P.C. and PENTA Communications, Inc., who contribute significant time, energy, and enthusiasm every week on our behalf as strong partners in our efforts to manage our organization and highlight our findings. We are deeply grateful to the corporate and philanthropic communities, and our individual supporters, who provide invaluable resources that allow us to

advocate for and support informed public policy in Greater Worcester. All of their contributions are acknowledged, but not nearly enough, at the end of this report. We also give thanks to Worcester's media outlets, especially our media sponsor the *Telegram & Gazette*, who assist us in engaging wide audiences across Central Massachusetts. Finally, we thank The Research Bureau staff – past and present – for their many contributions to this organization and this region over the years.

On behalf of The Research Bureau, we are excited to add new building blocks to our already strong foundation, offering guidance for challenges facing Greater Worcester and our *polis*. We look forward to your partnership and support in our joint efforts to ensure community-wide success.



John J. Spillane, Esq.
Chairman of the Board



Timothy J. McGourthy
Executive Director

THE YEAR IN REVIEW

2017

Over the past year, The Research Bureau continued its mission to delve deeply into the foundations of public policy in Greater Worcester, while expanding on new initiatives. The year has been busy and full of impact; the Bureau's work has been central to community discussions on such topics as taxes, education, and public health. Our third annual *Worcester Almanac*, a compendium of information for all things Greater Worcester, continues to provide data on a range of additional topics that serve as a tool for local communities seeking to understand and respond to the dynamic state of our region.

The underpinning of successful government is informed and engaged leadership and citizenry. In 2017, The Research Bureau continued its longstanding commitment to civic engagement. In April, we recognized outstanding public employees at our 29th annual Thomas S. Green Public Service Awards. This year, the Bureau honored four employees of exceptional merit hailing from the City of Worcester and Worcester Public Schools. We launched Worcester's first State of the City Address with City Manager Edward M. Augustus, Jr., in partnership with Mechanics Hall and the *Telegram & Gazette*. The City Manager provided an insightful overview of current projects, future initiatives, and the overall welfare of the City. We released our biennial *Questions for the Candidates for City Council and School Committee*, reviewing key issues in the community to help candidates and the public contemplate challenges and craft considered policy responses. Finally, in cooperation with the Worcester Regional Chamber of Commerce, *Telegram & Gazette*, and Mechanics Hall, we are hosting a series of municipal candidate debates, ensuring that the electorate will hear directly from those who seek to lead our community into the future. As one of the premiere public policy institutions in Central Massachusetts, The Research Bureau continues to add new information and expertise to its already strong foundation exploring complex topics, both new and old.

MUNICIPAL OPERATIONS

Sound municipal finance and government efficiency is the heart of The Research Bureau's activities. More than thirty years after our founding, those bedrock principles hold true today. Now in its 4th year, *Breaking Down the Budget: Questions to Consider, City of Worcester & Worcester Public Schools* has become an invaluable source of information and explanation of the budgets of both the City of Worcester and the Worcester Public Schools – allowing the public a glimpse into the financial wellbeing of its local governmental institutions. Building on the success of this series, The Research Bureau hosted a forum with leaders from Worcester, Shrewsbury, Auburn, the Massachusetts Department of Revenue, and the Massachusetts Municipal Association to understand the challenges local communities face as they prepare budgets for a new fiscal year. The Bureau reviewed the region's Other Post-Employment Benefits (OPEB) liability situation, examining statewide OPEB practices and offering best practices in order to improve municipal long-term liability. Yet, fulfilling the mantra of "doing more with less" requires not only refined budgeting but also effective practice. Quality government requires quality management and operations. The Research Bureau published "*How Am I Doing?*" *Municipal Employee Performance Evaluations*, a study of local and national practices on employee performance evaluations, resulting in a series of recommendations for Greater Worcester on the adoption and implementation of formal employee evaluation systems.

FINANCES

The property tax debate is all too familiar to the Worcester community, with both residents and businesses locked in a perpetual tug-of-war as a result of the dual tax rate and the limits imposed by Proposition 2½. Over the past year, The Research Bureau went back to the basics, exploring the history, status, and impact of property taxes both locally and across Massachusetts. The Bureau added fact-based research to a debate that is often all too emotional and anecdotal. After intense study of Worcester's tax classification system, the Bureau released its report *Tax Classification: Passing the Buck*®, exploring the lasting effects of the dual tax rate on residential and CIP properties. Building on this research, the Bureau released *A Research Bureau Policy Alternative: Tax Rates*, a white paper offering criteria for consideration in preparation of annual tax rate determinations and alternatives to secure a more equitable and less damaging single tax rate. The report drew the interest of business and government leaders alike and the findings were presented to the City Council's Committee on Economic Development to assist in the annual deliberation process.

HEALTH

Recognizing the important connections between education, health, and economic activity, The Research Bureau partnered with the Coalition for a Healthy Greater Worcester, which includes representatives of the City of Worcester's Division of Public Health and the University of Massachusetts Medical School, to work on the Community Health Improvement Plan (CHIP) and its efforts to identify change agents within the public health field. The CHIP established goals for the health of Worcester's residents but it lacked a system to track the very metrics it laid out. The Bureau worked closely with community partners to identify priority areas and objectives, outline strategies to measure progress, and isolate the outcomes. This initiative has established a framework that makes it possible to track the health of Greater Worcester residents well into the future.

ECONOMIC DEVELOPMENT

As new buildings rise in the Downtown, new roots go down in the City of Worcester. The Research Bureau has maintained its focus on the importance of economic development for a healthy city and vibrant community. In January, The Research Bureau offered an overview and series of recommendations related to tax incentives in Worcester with *Bureau Brief: Tax Increment Financing*. More recently, we offered our analysis and recommendations on the state of foreclosures with *Foreclosures in the City of Worcester*. We also hosted a series of forums focused on the role of urban design in economic development, recognizing that true urban vitality comes from the pedestrian experience of both the public and private realms. In the spring, The Research Bureau launched its urban design series in concurrence with "Jane Week," an opportunity to celebrate the lessons of renowned urbanist Jane Jacobs, with our forum "Growth by Design: The Interplay Between Urban Development & Urban Design." Following a presentation by one of New England's leading urban designers, a panel of academic and municipal experts discussed the challenges and opportunities for local governments in promoting and regulating urban design. Building on this foundation, the Bureau released *Bureau Brief: Urban Design*, an analysis of regional urban design frameworks with an additional focus on Worcester's policies. "Growth by Design II: Designing the Future of Worcester" was the latest discussion that brought together a panel of local experts to discuss Worcester's experience and opportunities in urban design.

EDUCATION

Public education has been a priority for The Research Bureau for many years and is a crucial foundation for a successful city. Building on our 2016 report *The Urgency of Excellence: Considerations for the School Committee and New Superintendent of Schools in Worcester*, The Research Bureau and Worcester Education Collaborative reached out to the Worcester Public Schools and business and community leaders to begin crafting a strategic plan for public education in Worcester. The Research Bureau was a catalyst for the strategic plan and is a key member of the leadership committee, assisting with the research, analysis, and identification of best practices. Prior to the launch of the strategic planning initiative, The Research Bureau and Worcester Education Collaborative also co-hosted a forum entitled "Valedictory: Achieving Excellence in the Worcester Public Schools" – a round-table discussion with recent public school valedictorians to discuss the path to academic success as well as the challenges and opportunities found in the public education system. The Research Bureau is working in tandem with representatives of the Worcester community to ensure the success of our young people, our schools, and our community.

Worcester has strong foundations and a bright future. The Research Bureau, together with leaders in the community, is working to ensure that each new brick added to Worcester's complex structure is informed, data-driven, and captures best practices from across the nation. In 2017, The Research Bureau continued to build on our valued past while exploring new ground. Like Worcester, we will continue to adapt to the needs of the community and the challenges confronting local government.

REPORTS AND BRIEFS

SINCE OUR LAST ANNUAL REPORT,
THE RESEARCH BUREAU PREPARED THE FOLLOWING REPORTS AND BRIEFS:

Tax Classification: Passing the Buck\$ - Ending the Tug-of-War Among Worcester Taxpayers

Bureau Brief: Tax Increment Financing

Other Post-Employment Benefits (OPEB): Holding Government Liable

Worcester Almanac: 2017

A Research Bureau Policy Alternative: Tax Rates

“How Am I Doing?” Municipal Employee Performance Evaluations

Breaking Down the Budget: Questions to Consider, City of Worcester & Worcester Public Schools FY2018

Bureau Brief: Urban Design

Questions for the 2017 Candidates for City Council and School Committee in Worcester

Foreclosure in the City of Worcester



FORUMS AND EVENTS

SINCE OUR LAST ANNUAL REPORT,
THE RESEARCH BUREAU ORGANIZED THE FOLLOWING FORUMS AND EVENTS:

31st Annual Meeting featuring Governor John H. Sununu

Valedictory: Achieving Excellence in Worcester Public Schools

Local Budgeting: Prepping for FY2018

Growth by Design: The Interplay Between Urban Development & Urban Design

State of the City Address with City Manager Edward Augustus

Growth by Design II: Designing the Future of Worcester

City of Worcester Municipal Debates 2017

Co-Sponsored with the Worcester Regional Chamber of Commerce and
Worcester *Telegram & Gazette* and in Partnership with Mechanics Hall

School Committee Candidate Debate

Mayoral Candidate Debate

City Council At-Large Candidate Debate

City Council District Candidate Debate



FORUMS AND EVENTS (CONTINUED)

HIGHLIGHTS



**31st Annual Meeting featuring
Governor John H. Sununu**



**Valedictory: Achieving Excellence in
Worcester Public Schools**



**Local Budgeting:
Preparing for FY2018**



**State of the City Address
with City Manager Edward Augustus**



**Growth by Design:
The Interplay Between Urban Development
& Urban Design**



**Growth by Design II:
Designing the Future of Worcester**

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 2017 THOMAS S. GREEN PUBLIC SERVICE AWARD RECIPIENTS WERE HONORED AT A CEREMONY AND RECEPTION AT ASSUMPTION COLLEGE ON APRIL 26, 2017.



*From left: **Brian Cummings**, Worcester Technical High School; **Hermes Rivera**, Worcester Department of Public Works & Parks; **Amanda Gregoire**, Worcester Executive Office of Economic Development; **Bruce Donahue**, who accepted the award on behalf of his wife, **Debra Donahue**, Worcester Office of the City Clerk*



31ST ANNUAL MEETING

OF THE RESEARCH BUREAU

THURSDAY, OCTOBER 6, 2016 | DCU CENTER | WORCESTER, MA



WITH FEATURED SPEAKER:
**THE HONORABLE
JOHN H. SUNUNU**



The Research Bureau



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BOARD OF DIRECTORS MEETINGS

February 7, 2017

Board Meeting at MCPHS University

March 9, 2017

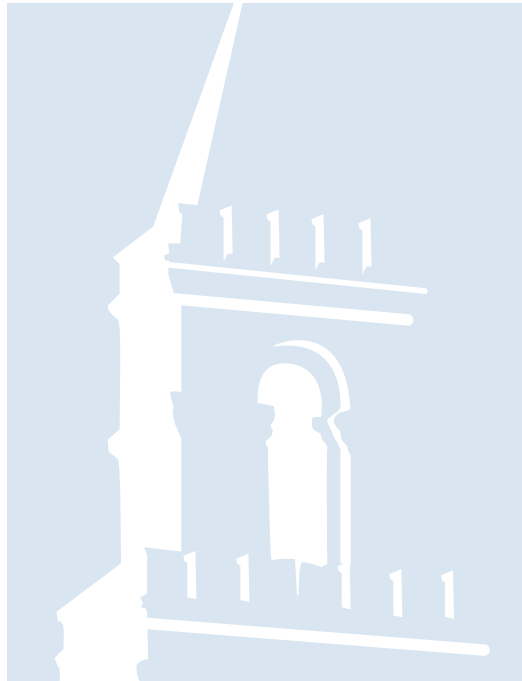
Board Reception at Assumption College

First Quarter 2017

Board Roundtables

June 29, 2017

Board Meeting at the Regional Emergency Communications Center



ANNUAL MEETING SPEAKERS

- 2017** James A. Peyser, Secretary of Education, Commonwealth of Massachusetts
- 2016** John H. Sununu, Former Governor, State of New Hampshire, and White House Chief of Staff
- 2015** Jonathan Kraft, President, The Kraft Group
- 2014** Jay Ash, City Manager of Chelsea
Bernard F. Lynch, Founder, Community Paradigm Associates, LLC
Michael V. O'Brien, Executive Vice President, Winn Development
- 2013** Edward Glaeser, Fred and Eleanor Glimp Professor of Economics, Harvard University
- 2012** Eric S. Rosengren, President & CEO, Federal Reserve Bank of Boston
- 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 & CEO, 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
- 2004** 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 Budget Planning, 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

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2017 ANNUAL REPORT

OF THE RESEARCH BUREAU

BUILDING ON A STRONG FOUNDATION



The Research Bureau

*serves the public interest of Greater Worcester by conducting independent,
non-partisan research and analysis of public-policy issues to promote
informed public debate and decision-making.*

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