



The Research Bureau

2012 ANNUAL REPORT

Celebrating our past,
constructing our future.



We proudly support The Research Bureau's exemplary work.

Since 1955, Commerce Bank has had a single mission: to support the growth and vitality of communities in central Massachusetts. From volunteering our time to investing in neighborhoods, we are committed to helping the people and businesses of this region thrive.

Our success in achieving this goal is predicated on our philosophy of delivering the innovative products, services and capabilities our customers need and deserve. This has resulted in Commerce Bank being voted Wachusett Region's Best Community Bank and Best Bank in Worcester County for 2011 and Corporate Citizen of 2012 by the Holden Landmark, Worcester Magazine and Worcester Business Journal/Clark University Graduate School of Management, respectively.

As part of our commitment to the Commonwealth's well-being, we are proud to support The Research Bureau in its continued efforts to research public policy issues and maintain its position as a leading source of information for government, business and citizens.

Our investment as this year's Presenting Sponsor emphasizes this commitment and salutes The Research Bureau's dedication to exemplary work. Together, we can build a better tomorrow.



Brian W. Thompson

President and CEO
Commerce Bank

A handwritten signature in dark ink that reads "Brian".

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Agnes E. Kull 1937-2011

Agnes Kull arrived in the United States at the age of 15, having been a war refugee. She rose to become Chairman of the Board of Greenberg, Rosenblatt, Kull & Bitsoli, the largest independent accounting firm in Worcester at a time when few women entered the field of accounting. She also became an indispensable part of some of Worcester's most significant institutions including the Worcester Art Museum, Music Worcester, UMass Memorial Foundation, and Bancroft School, as well as The Research Bureau.

Once Agnes decided that an organization merited her commitment, it became the beneficiary of her magnanimity and hard work. The Research Bureau was fortunate to be one of these organizations to which Agnes devoted countless hours and considerable energy. Beginning in the early 1990's until her sudden death last June, she volunteered to be The Research Bureau's treasurer. This meant that she and her firm kept our books and accounted for every penny spent, making a business manager superfluous. She also served as Research Bureau Board Chairman from 1999-2001, the period during which we received a performance measurement feasibility grant from the Sloan Foundation that started us on the road to benchmarking government performance.

Agnes's tough and "no nonsense" exterior was belied by a warmth and generosity radiating right below the surface. All Research Bureau staff members are grateful for having had the privilege of working with Agnes, and benefiting from her love of crunching numbers, her keen intellect and insights, wise counsel, and sincere friendship. The tremendous loss we feel is shared by her family, friends, co-workers, and all those whose lives she touched.



A Message from the President and the Chairman of the Board

This has been an exciting year for The Research Bureau, one of transition, opportunity, and re-invention. After almost two years of careful study and planning by a committee chaired by Philip R. Morgan, with members George W. Tetler, III, Agnes Kull, Kevin O'Sullivan, Brian Thompson, and Sandra Dunn, the Bureau entered into a collaboration with Assumption College. The purpose is to advance the mission of both institutions and the well-being of the Greater Worcester community. To facilitate this collaboration, which was overwhelmingly approved by the Boards of both institutions last October, The Research Bureau moved to prime space and a welcoming environment on the Assumption College campus in December.

While maintaining our separate legal identities, the Bureau and the College will be able to accomplish goals together that we could not achieve separately. The opportunities include the development of an internship program, a research agenda related to public policy issues in Central Massachusetts, the development of courses related to urban politics and policy, joint sponsorship of lectures and forums, and joint application for foundation grants.

The internship program will be launched in the fall semester. We have co-sponsored two very successful and provocative programs during this past academic year: a lecture by Harvard economist Edward Glaeser and a forum on recruiting and retaining the best public school teachers. We have also submitted a proposal jointly with the College's Political Science Department to a foundation for a grant to initiate some of our plans. We are encouraged by the reception with which our new venture with the College has been received and we look forward to its unfolding.

Although The Research Bureau has vacated its offices downtown, our move should not be construed as abandoning our interest in Worcester's central core. Although the total tax revenues from downtown properties constitute less than 6% of the total tax levy, downtown plays an outsized role in shaping a city's and residents' pride in their community. Therefore, the Bureau will retain its focus on improving downtown.



We are a charter member and active participant in the recently constituted Downtown Neighborhood Association (DNA) designed to promote the development of a safe, attractive and prosperous downtown. At the request of DNA members, the Bureau prepared, administered, and analyzed an online survey of downtown businesses and residents to determine their concerns and perceptions of the neighborhood. The survey results have been incorporated into the group's work plan.

As further evidence of our commitment to downtown, we call your attention to the theme of this year's annual report: Celebrating Our Past, Constructing Our Future. It is reflected in the pictures on the following pages, which capture the new projects that are reshaping the City's skyline and its ground-level infrastructure. Our continued focus on downtown is also reflected in our recent forum on "Downtown Revitalization: What Works?" which considered what can be learned from other cities, and our Benchmarking Economic Development report, which measures various facets of downtown performance. Deborah O'Malley, General Counsel of the Massachusetts College of Pharmacy & Health Sciences recently remarked, "As MCPHS continues to invest in downtown Worcester, I am grateful to The Research Bureau for its work in promoting public discourse on topics such as urban renewal and education. The Research Bureau's work provides a basis for the community to come together and move forward in building Worcester's future."

We also note that the theme of our annual report parallels The Research Bureau's own 27-year journey. We celebrate our past accomplishments as we construct our new relationship with Assumption College.

In conclusion, we want to take a moment to acknowledge all those 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 foundation communities, and individuals from all walks of life 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 highly 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.

Michael J. Mulrain

Michael Mulrain
Chairman of the Board

Roberta R. Schaefer

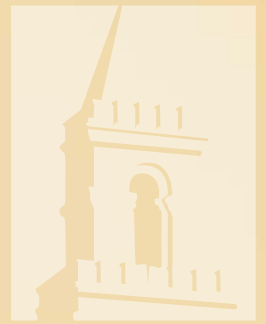
Roberta Rubel Schaefer
President & CEO



The Year in Review

EPA Stormwater Regulations in Worcester: Will Ratepayers be drained?

In 2011, The Research Bureau published a report analyzing recent stormwater permit requirements issued by the Environmental Protection Agency (EPA). These regulations are unfunded mandates and the cost to comply would be about \$1 billion, raising residential sewer bills to over \$1,000 annually. We found that the EPA was not required to do a cost-benefit analysis, and according to scientific evidence, the marginal benefits were far outweighed by the exorbitant costs to be borne by ratepayers. Because Worcester ratepayers were already facing costs of \$200 million to comply with sewage and wastewater treatment upgrades to its wastewater treatment plant, the City's Department of Public Works and Parks challenged the EPA in Federal District Court. The Research Bureau's report was included in the City's brief because of the comprehensive history and analysis we provided. The Court has ruled that the EPA must negotiate the terms of the permit with the City, which the Federal agency had been unwilling to do before that ruling.

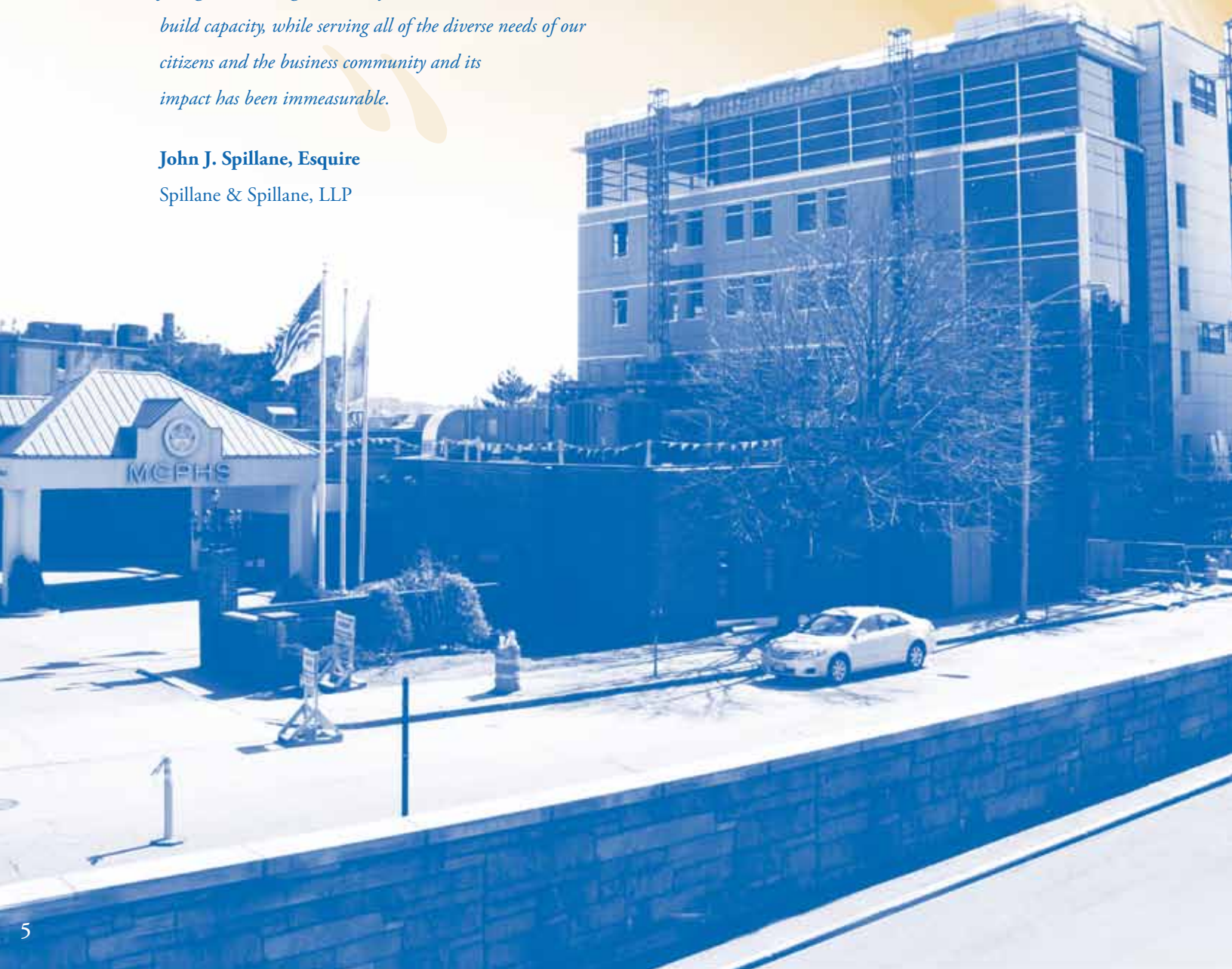


For nearly three decades

The Research Bureau has served the citizens of Central Massachusetts by hosting timely and informative forums and producing independent reports that are highly competent and most credible. Its research has inspired community stakeholders, business leaders and our elected leaders to think more critically about effective public policy solutions to the tough issues facing our evolving community. The Research Bureau continues to build capacity, while serving all of the diverse needs of our citizens and the business community and its impact has been immeasurable.

John J. Spillane, Esquire

Spillane & Spillane, LLP



Where Have all the Bidders Gone? The Impact of the Responsible Employer Ordinance on Public Construction

Four years ago, The Research Bureau recommended that the City rescind its Responsible Employer Ordinance (REO) because of strong evidence that it acts as a deterrent to contractors to bid on public construction projects. Because of its apprenticeship training requirements, the REO tends to reduce the number of bidders, thereby driving up the cost to taxpayers and discriminating against otherwise qualified contractors. A Federal District Court recently issued a ruling in Fall River, which had a similar ordinance, finding against the apprenticeship training requirement. In the face of a legal challenge from open-shop contractors, Worcester's City Manager suspended the legally questionable provisions of the REO. At the request of several building contractors, we prepared an explanation of the benefits of the Court's decision for the City and local contractors who had not been able to bid before.

Worcester Settles with its Unions: A Review

The Research Bureau monitors contract settlements with municipal employee unions because of their impact on the City's expenditures and on the quality of municipal services. The 2011 settlements between the police, fire, and teachers' unions were structurally similar. In exchange for health insurance concessions, labor received modifications to their salary schedule and formal raises. The School Committee's settlement with the teachers' union, however, was the most generous to labor. The modifications to the teachers' salary schedule were true increases in both take-home pay and pensionable earnings. In addition, in this contract, the Worcester School Committee reaffirmed the practice of compensating teachers based purely on seniority and advanced degrees. The Massachusetts Board of Elementary and Secondary Education, by contrast, recently adopted new regulations that will require districts to weigh student performance measures as a significant factor in teacher evaluations. The Worcester School Committee, having full knowledge of the direction in which the state Board was moving, negotiated a contract that rewards the seniority of teachers and ignores the performance of students. As these regulations are implemented, the Worcester Public Schools will be compensating teachers in a different manner than how it is evaluating them.

As a Worcester County employer, Consigli relies on the consistent quality of information The Research Bureau offers, which has a direct effect on our business in the City of Worcester and throughout New England.

Anthony Consigli, President,
Consigli Construction Co., Inc.

As a Worcester resident and business owner, I'm invested in the future of my city and so is The Research Bureau. Beyond its solid reputation for fair, in-depth analysis of critical issues, The Research Bureau is driven by the desire to serve the city and help it succeed. The Research Bureau's policy papers and studies should be a blue print for government officials, business leaders and citizens to build a stronger Worcester.

John Lauring, President,
Lauring Construction Co., Inc.

Recruiting and Retaining the Best Teachers

Because teacher quality is judged to be the most important factor affecting student achievement, The Research Bureau organized a forum to discuss options for teacher recruitment and retention to get the best qualified and committed teachers. The participants included a director of district partnerships for Teach for America (TFA) (which recruits talented people for urban school districts, provides two month training program before entering the classroom, and additional training and courses through their two-year stint), the director of the Boston Teacher Residency (BTR) program, (a year-

long residency in a Boston Public Schools classroom with an experienced teacher and rigorous master's level courses before becoming a Boston Public School teacher), an Assumption College education professor, and a member of the Worcester School Committee (WSC). Following a lively discussion on the pros and cons of these programs for recruiting and retaining the best teachers, one WSC member filed an item requesting the Committee consider introducing these programs in the WPS.

Strong communities start with sound governance. The Research Bureau's focus on the intersection between sound public policy and good fiscal management has had a lasting impact on this region.



Joseph Zukowski, Vice President Government Affairs,
Verizon

Questions for the 2011 Candidates for City Council and School Committee in Worcester

During the 2011 election cycle, we prepared a series of questions and accompanying policy analyses for Worcester City Council and School Committee candidates. They were reprinted in the Telegram & Gazette during the weeks

prior to the election. The questions were also asked during candidate debates sponsored by the Worcester Regional Chamber of Commerce. These analyses are intended to educate residents about the issues in the local elections.



Investing in Girls

In 2010, the Investing in Girls (IIG) Alliance, which is funded by the Daniels Foundation and the Common Pathways Determination of Need Process, contracted with The Research Bureau to conduct an updated needs assessment to steer the program providers of IIG, funders, and community organizations involved with middle-school girls in Worcester and nearby towns. We prepared three different surveys for middle-school girls, their parents, and program providers of organizations administering programs for middle-school girls and we analyzed the results.

Some of the key findings included the following:

- 92% of girls surveyed see college or other post-secondary education as part of their future.
- 83% reported that they received grades of A and B.
- 66% reported spending no more than an hour a day on homework.
- Only 35% of 7th and 8th graders scored advanced/proficient on the Math MCAS.
- 57% of 8th graders spend three or more hours each day watching television, playing video games or using the Internet for non-school purposes.
- 43% of 8th graders said their parents never monitor their Internet and cell phone activities.

The survey results were compiled in a report that identifies some of the issues facing middle-school girls. It also includes observations and recommendations of how these issues might be addressed.

Reports:

- Benchmarking Public Safety in Worcester: 2012 (*May 2012*)
- Benchmarking Economic Development in Worcester: 2012 (*March 2012*)
- Worcester Settles with its Unions – A Review (*November 2011*)
- Downtown Worcester Office Occupancy Survey (*October 2011*)
- Questions for the 2011 Candidates for City Council and School Committee (*September 2011*)
- Benchmarking Municipal and Neighborhood Services in Worcester: 2011 (*July 2011*)
- 10 Questions about Worcester's FY12 Budget (*June 2011*)
- EPA Stormwater Regulations in Worcester: Will Ratepayers be Drained? (*May 2011*)

The Bureau provides invaluable research information to better serve government and the public's best interests by presenting new and creative ways in providing essential services in a more cost effective and efficient manner. And by working together with The Research Bureau, the public and private sectors have the opportunity to continue to be key partners for the benefit of our entire Central Massachusetts region!

Kevin O'Sullivan, President & CEO,
Massachusetts Biomedical Initiatives



May 31, 2011: *26th Annual Meeting*

with Featured Speaker **Senator Scott Brown**





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More than ever, the work of The Research Bureau aligns with, and informs, the business strategies of many organizations across the region. All of us are analyzing the delivery of our services, how they dovetail with the delivery of municipal services and the increasing challenge of delivering these services in a more affordable manner. We are grateful that The Research Bureau continues to lead the charge.

John G. O'Brien, President & CEO,
President & CEO, UMass Memorial Health Care, Inc.



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 2012 Thomas S. Green Public Service Award recipients, honored at a ceremony and reception at Assumption college on March 15, 2012 are as follows:

Donna Derrico-Sands

*Worcester Department of
Public Works and Parks*

Lt. Annmarie Pickett

Worcester Fire Department

Jack Navin

*Custodial Management,
Worcester Public Schools*

Jose Dinguì

Southbridge Police Department



Forums:

Triumph of the City

September 22, 2011

Assumption College

Harvard Professor Edward Glaser

Sponsor: *Fallon Community Health Plan*



Healthcare Reform: Is it healing Massachusetts and the nation?

October 24, 2011

MCPHS

Sponsor: *Harvard Pilgrim Health Care*



Balancing the FY13 Budget: Has the crisis passed?

March 7, 2012

MCPHS

Sponsor: *Harvard Pilgrim Health Care*

Proposals Recruiting and Retaining the Best Teachers

April 3, 2012

Assumption College

Sponsor: *Rand-Whitney Container*



Downtown Revitalization: What Works?

May 2, 2012

MCPHS

Sponsor: *Fallon Community Health Plan*





The Research Bureau **Annual Meeting Speakers**

- 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 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

On the job

Stephen D. Eide

Senior research associate,
The Research Bureau

Age: 32

Time in job: 4 years

Resident of: Acton

Originally from: Richmond, Va.

Family: Married, three children



What is The Research Bureau (formerly the Worcester Regional Research Bureau)?

"We are a nonprofit, nonpartisan organization, which examines public policy issues that are of interest to area officials and residents. We look at subjects like public education, municipal finance and economic development. It's really unusual to see an organization like ours operating in a city the size of Worcester."

Why do you research these topics?

"Research organizations like ours began in the early 20th century as part of an effort to reform corrupt city governments. Our purpose is to inform the public and to assist officials in the decision-making process. The Research Bureau is a good way for citizens to get facts. We might also advocate on particular issues."

How do you report your findings?

"We issue two kinds of studies. Our benchmark reports basically provide a look at the health of the city. In these studies, we do not take a position or make recommendations. We just provide information. Our second type examines topical issues. In these studies, we offer facts, provide analysis and make recommendations. These reports are drawn up to elevate the debate on issues. In these particular studies, we're trying to make Worcester a better place to live. We also sponsor lectures and forums to provide information on issues."

Do you get any response to your reports?

"Yes, we do, and many people appreciate what we're doing; however, we do get some pushback from people and organizations that don't like the positions we take on certain matters. For example, we often examine union issues and sometimes the unions let us know that they don't particularly care for our findings. Organizations like ours have been described as watchdogs. We work to make our reports fact-based and we look for the common good. We don't operate in a gotcha-style and we're not out to get anyone. We don't want to be contentious."

What kind of subjects do you like to report on?

"I have to admit that I like researching dorkier issues, like the Worcester pension system or the city's bond rating."

How do you pull together a report on a subject that you're really not interested in?

"I have to make myself interested. And very often, I work on issues that I have very little knowledge about. For example, I studied political science and philosophy. I have no background in economic development, but very often I'm reporting on it. On a lot of subjects, the learning curve for me is steep. Some issues are very complicated and multifaceted. The work, however, is always intellectually stimulating."

How do you compile your research?

"Basically, I pull together as much data that I can on a particular subject. Today, the Internet makes the process much easier. I also interview government officials and others who might have information about the issue I'm looking at. The Research Bureau is a resource. We provide the spade work for people looking for information."

How long does it take to put a report together?

"Generally, a report takes three to five months to work on. That's not too bad, though, because I'm usually working on two or three issues at the same time."

What difficulties do you face when you're putting together a study?

"We don't want to make mistakes, so it's important to check the facts. I also worry about misreading things when I'm working on an analysis. Many times, there's a lot of data that I have to deal with so I have to carefully whittle down the information. Presentation is also important. You want the report to be readable and not boring. You try to tell a story."

What are some of your other responsibilities?

"I have a weekly radio column on WCRN radio and I handle inquiries from the press and the general public."

Compiled by reporter Bronislaus B. Kush



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Peterson Oil Service
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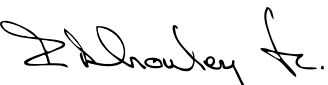
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Ralph D. Crowley, Jr.
President and CEO
Polar Beverages



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