2014 STATE RACES
ENDORSEMENT QUESTIONNAIRE

Date:

Candidate: Stephen J. Kerrigan
Office Sought: Lieutenant Governor
Party: Democrat
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RETURN COMPLETED QUESTIONNAIRES BY MONDAY, FEBRUARY 3, 5:00PM, BY EMAIL ONLY
RETURN QUESTIONNAIRE AS (1) WORD FILE AND (2) PDF.
E-mail completed questionnaire to deborah@progressivemass.com.
Please be in touch with Executive Director Deborah Shah with questions, at 917-922-7947 or by email.
I am running for Lieutenant Governor to put my skills and experience to work for the Commonwealth and to help the next Democratic Governor advance his or her agenda and keep Massachusetts moving forward.

I am the only candidate for Lieutenant Governor with experience at all levels of government – state, local and federal in addition to a record of effective management and fiscal responsibility in both the public and non-profit sectors.

I have been involved in public service for nearly two decades. I served as a Selectman in my hometown of Lancaster, top aide to U.S. Senator Edward M. Kennedy and Attorney General Tom Reilly, and, through two campaigns, served in senior roles for President Barack Obama. Most recently, I was co-chair of the Presidential Inaugural Committee, a post President Obama asked me to fill after a two-year stint as CEO for the 2012 Democratic National Convention Committee. Prior to that, I was chief of staff and senior advisor to Boston 2004, Inc., working closely with Mayor Thomas M. Menino, federal and state officials, private corporations and community groups to put on the 2004 Democratic National Convention. I serve as the President of the Massachusetts Military Heroes Fund, a private non-profit organization that has provided support, programs and services to 180 families of military service personnel from Massachusetts who have fallen in service since September 11, 2001.

When John Adams wrote the Massachusetts constitution, he stated that Massachusetts would be a Commonwealth. As he put it, that meant there should be a connection from the collective to the individual and the individual to the collective. Therefore, state government’s role should reflect that grand ambition. Government must protect the most vulnerable among us, provide the basic services upon which we all depend, provide for the public’s safety and general well-being, ensure equal opportunity for all, and create the environment for economic growth and prosperity.
4. If elected, what would be your top three priorities?

My first priority as Lieutenant Governor would be to support the Governor and do my best to support his or her agenda and the initiatives of the administration. I would seek to head a Competitiveness Council to examine all areas of life in Massachusetts to determine how best to grow our economy and improve our quality of life. That effort would include a Government Efficiency Initiative to ensure that precious state resources are being used correctly and toward their intended aims. I would also make the Lieutenant Governor's office a first stop for communication from citizens, businesses, institutions and others with problems or concerns about state government – where they can not only air those issues, but also get answers and solutions.
II. The Issues

Please compose your answers directly in the document, underneath the question. Limit answers to 250 words or fewer. No attachments.

Our questionnaire is focused on economic justice and inequality, as outlined in our Shared Prosperity Agenda (forthcoming). We are interested in your overall philosophy and approach to the components of the Shared Prosperity Agenda, as well as your views on specific policy and legislation.

In each section, Question 1 seeks your overall view, values, principles and priorities. You do not need to address each item embedded in these first questions; they are suggestions.

In each section, Question 2 asks about your advocacy experience; you may leave it blank if appropriate—we do not expect candidates to have a record on every issue. Current or former elected officials: please outline your leadership roles, as opposed to simply your voting record.

Additional questions seek your position on specific policies and legislation. At a minimum, please answer “yes” or “no”; you may also provide an explanation of your positions, as appropriate.

A. Job Growth and the Economy

The Massachusetts economy has continued to grow and recover from the Great Recession, but the gains have not been shared equally. Poverty levels continue to increase, while the minimum wage loses value every year. Massachusetts now ranks 8th in the nation for income inequality.

1. Share your personal values and principles on job growth and the economy.

   How can we improve the economy and economic security for all people? How do we grow the number of good paying jobs in the Commonwealth? How do you view wealth and income inequality, and what would you do about it, if anything?

My first act as Lieutenant Governor would be to ask the Governor to allow me to chair a Commonwealth Competitiveness Council. Under my plan, the Council would convene people from all areas of life in Massachusetts to determine how we can best grow our economy and improve our quality of life. The Council would produce specific proposals that will make the Commonwealth more competitive nationally and globally, help businesses grow here, attract new businesses to locate here, and help workers and families better afford to live, thrive and enjoy a higher quality of life. Among the issues the Council would explore would be our state tax structure, government tax incentives, our education system from early education to public higher education, rising income inequality, worker training, arts and culture, transportation and infrastructure, and closing the digital divide. As part of that effort, and to ensure that state budget dollars are being correctly directed towards our most pressing needs, I would also seek to head a Government Efficiency Initiative that would look at state government from top to bottom.

2. Optional/As Applicable: Please indicate work you personally have done to advance your principles on job growth and the economy (legislation, community work, published writings, etc).

I have worked with business leaders, public officials and academics throughout my career to help build our economy by playing to our strengths and working to create new opportunities. As Chief of Staff to Boston 2004,
the local host committee to the 2004 Democratic National Convention, I helped to create hundreds of millions of dollars in economic impact.

3. **Minimum Wage.** Do you support:
   - Raising the wage to at least $10.50/hour: Yes X No
   - Indexing automatic yearly increases to inflation: Yes X No
   - Increasing tipped wages to 60% of the minimum wage: Yes No X

4. **Unemployment Insurance and Minimum Wage.** As of January 2014, the legislature is negotiating a bill that would pair an increase in the minimum wage with cuts to unemployment insurance. Do you oppose this effort?
   - Yes No

   I would defer on a definitive answer on this without knowing the details of a legislative proposal.

5. **Earned Sick Time.** Do you support requiring businesses with more than 11 employees to provide earned, paid sick time to their employees?
   - Yes X No

6. **Job Creation and Standards.** A “Job Creation and Quality Standards Act” would require corporations that receive any kind of public benefits (grants, tax expenditures procurement contracts) to, in turn, pay a living wage ($15 per hour plus benefits) to full-time employees. Do you support such legislation?
   - Yes No

   I support efforts to raise the living standards of low-wage employees. I would need more specifics on this particular legislation before committing to its support.

7. **Employee-Owned Businesses.** Do you support legislation to foster and develop employee ownership of businesses in Massachusetts?
   - Yes X No

8. **Co-ops, Benefit Corporations, Community Banks.** Do you support legislation that would encourage the formation of cooperatives and/or benefit corporations and the development of community banks?
   - Yes X No
B. Education and Workforce Development

Public education has always been a gateway to opportunity and mobility for all, regardless of economic circumstances, a cornerstone of the American dream for all residents. However, the soaring price of higher education over the last several decades has made access to this opportunity increasingly out of reach, at the very moment when higher education makes a greater difference to one’s economic future. Meanwhile, powerful corporate interests have been steadily undermining public school teachers and unions and siphoning money from our public K-12 system.

1. Please share your personal values and principles regarding public education and workforce training. What value does public education and workforce development have in improving our economy as well as in addressing matters of economic justice? What measures should the Commonwealth take on these issues? You might address, for example, charter schools, school vouchers, standardized testing and federal programs like No Child Left Behind and Race to the Top.

Education is the greatest economic development tool we have, and the strength of our public education system has been, and should always be, a Massachusetts hallmark. We must build on the gains we have made as a Commonwealth and continue our progress – and not just maintaining our place atop national rankings, but to make sure our students are among the best in the world. My mother is the school secretary at our elementary school in my hometown of Lancaster for nearly 40 years and my sister is a public school teacher in Lunenberg. I believe that the changes and policies we pursue to achieve these goals have to be enacted with collaboration of all in the education system.

2. Optional/As Applicable: Please indicate work you personally have done to advance your principles on education and workforce development (legislation, community work, published writings, etc).

As a selectman and finance committee member in Lancaster during the budget crises of the early 1990’s, I worked with local school officials to maintain our school budgets in the face of falling revenues and decreased local aid.

In 1996, I was tasked by Senator Kennedy to work to correct a finding in a Congressional Research Service report that showed Massachusetts was 37th in the nation in networked classrooms. As the senator’s Policy Director, I worked to bring together technology industry leaders with educators, unions and other community leaders. The result was the creation of a non-profit organization that took in in-kind donations of equipment and labor and organized Net Days around the Commonwealth where volunteers came together to wire classrooms and improve the connectivity of our public schools. Through our work, Massachusetts improved its place in the national rankings by 20 spots in 16 months.
3. **Achievement gaps.** What would you do to address persistent racial and economic achievement gaps in education?

While minority and low-income students in Massachusetts rank higher than those in other states, the achievement gap between their performance and students from suburban or more affluent districts is persistent and troubling. We need to attack this problem on several fronts. First, students need to be prepared to learn and we must increase our commitment to early childhood education. We need to work harder to attract good teachers to work in urban, rural and other struggling districts and support their efforts once there. One of the selling points of charter schools is that the public system could learn from their successes. This hasn’t always worked as advertised. We should explore programs working in charters and public school districts showing success in lower income areas and replicate those around the state. Those could include extended learning time, tutoring opportunities and challenging students to take on more AP programs.

4. **Universal Pre-K.** Do you support creating universal, free Pre-K, accessible to any resident of Massachusetts, integrated into the public school system?

   Yes X No

5. **Universal higher education.** Do you support a program that provides free, publicly funded higher education for every student who wants it?

   Yes No X

   While I fully support efforts to make our public higher education system more affordable, I do not believe that the Commonwealth’s budget can sustain free public higher education for all at this time. I value the ideals behind this concept and would be open to revisiting it at the appropriate time.

6. **Funding Structure.** Do you support changes to the Chapter 70 Education formula, including the Foundation Budget, to incorporate proper state funding for ELL students, Special Education students, transportation costs, charter school reimbursements to sending schools, and class size reduction?

   Yes X No

   The Foundation Formula has not been revisited in a fully comprehensive way since Ed reform was passed in 1993. Demographic changes and income changes among communities demand that we review the funding system to ensure that communities most in need of state assistance receive what they deserve.
C. Health Care

Massachusetts has led the way in providing near universal health care insurance coverage. However, we still spend an oversized portion of public and private money on health care, without necessarily achieving better health outcomes.

1. Please share your personal values and principles regarding health care insurance, delivery and outcomes.

Healthcare is a right that should be afforded to every resident in the Commonwealth. Massachusetts is home to the best healthcare in the world and that amazing healthcare should be accessible to the people of this state. Healthcare also is an important part of the Massachusetts economy – the largest private sector employer according to several studies – that must be nurtured and protected. However, providing world-class health care in this state should not come at the expense of the rest of the economy. The move from volume to value, where healthcare providers are paid for high quality outcomes instead of the number of procedures or visits, will help ensure healthcare is focused on keeping people well and better align the incentives across the continuum of care. Efforts to instill greater transparency in the business of healthcare will help consumers and lawmakers better understand how the industry functions and will create greater accountability and hopefully drive greater efficiencies in the delivery of healthcare services. We should pursue increased transparency around outcomes, by provider and services, but they must also be produced in a manner that is understandable and usable to patients.

2. Optional/As Applicable: Please indicate work you personally have done to advance your principles on health care (legislation, community work, published writings, etc).

Any discussion about healthcare is highly personal; I and my family members have had numerous instances where we have been thankful and grateful to receive care in one of the many outstanding healthcare institutions in Massachusetts. Having served as a member of the Board of Visitors at the New England Baptist Hospital, I have witnessed the miracles performed everyday but also that healthcare is a difficult business. We are fortunate to have these resources available to us in Massachusetts.

Working with Senator Edward Kennedy, I had the privilege of learning from one of the country’s biggest champions of healthcare. I learned that not everyone is fortunate enough to have easy access to the best care in the world and that it is a right we must fight for and protect.

Having served as the chief of staff at the state Attorney General’s Office which oversaw matters related to insurance, the protection and regulation of public charities, including many of the largest healthcare institutions we have, consumer protection and antitrust, I am well aware of the complexity of our healthcare system and what is at stake for patients, employees and businesses.
3. **Single Payer and Public Option.** Do you support moving Massachusetts to Single Payer insurance?

   Yes  No

   What role might a Public Option play, in your view?

   **While a single payer system could streamline an overly cumbersome administrative sector of the healthcare industry, we have seen in this state that government can play a strong hand and help push for a more efficient, transparent and competitive health insurance market that truly works for the people. A public option, well executed could play an important role in creating more standardization, value and competition in the market. Massachusetts is the beneficiary of the alternative to the public option in the Affordable Care Act, health insurance co-ops. We should continually push the carriers in our market to be innovative in how they use their members’ healthcare dollars, transparent in where their costs and surpluses lie, and collaborative with their providers.**

4. **Costs and Quality.** What steps would you take to lower health care costs while maintaining or improving health outcomes?

   **Studies have shown that costs in the Massachusetts healthcare market are driven by many factors, including market leverage and geography, that significant price variation exists among providers while outcomes can be quite similar, and that there is great variation in investment from community to community. Government should continue to play its role as both a regulator and major payer to encourage greater efficiencies in the healthcare delivery system.**

5. **Mental Health.** What steps would you take to address the gap in affordable mental health services?

   **Approximately one in four adults suffers from a diagnosable mental health disorder each year. And they tend to have additional healthcare issues and overall incur higher healthcare costs. We need to move away from the stigma of “mental illness” and toward a culture of “mental health” and “behavioral health.” I will fight hard to support programs in the state budget like, MCPAP (Massachusetts Child Psychiatry Access Program) where trained pediatric psychiatrists are made available for consultation to pediatricians across the state. Programs like MCPAP ensure services are made available in every community and in settings beyond the typical mental health provider’s office. I believe we must also enforce mental health parity laws, ensuring health plans are providing not just adequate coverage, but equal coverage for mental health services. This will go a long way to providing much needed care.**
6. **Health disparities.** What steps would you take to reduce racial and income disparities in health outcomes?

We must continually ask providers and payers what they are doing to create greater equity in investment across communities, to treat patients in a culturally attuned manner, and ensure that cutting edge medicine and clinical trials are targeting all ethnicities and socioeconomic sectors. Government must do better to ensure that those providers caring for the greatest number of Medicaid patients are not disadvantaged by receiving the lowest private reimbursements.

As the Attorney General reported, the disparity in healthcare investment by community cannot be tolerated. We must continue to shine a light on these disparities and hold healthcare providers and health plan administrators accountable for the delivering greater equity.

7. **Standards of care and cost.** Do you support establishing a state panel of experts (such as the Affordable Care Act's IPAB/"Independent Payment Advisory Board") to recommend high-value and cost-effective services?

   Yes   No

I support independent analysis that will further educate consumers and provide more fully informed and educated consumers about their healthcare options. Healthcare is rife with helpful data, we should be harnessing the power of this information to determine if certain care protocols are effective, or more effective than others, if standardized protocols can ensure better outcomes and should become the norm. However, most important are the decisions made between a patient and their doctor.

8. **Pharmaceutical companies.** Do you support prohibiting pharmaceutical companies from including direct-to-consumer drug advertising as tax-deductible expense?

   Yes   No  X

More than 10% of healthcare spending annually is on pharmaceuticals and this portion is projected to grow. As we see this percentage increase, our focus should not just remain on the cost of prescriptions, but on pharmacy and prescription management and adherence. Support to patients to ensure prescriptions are taken as directed, that they are having the intended effect having someone on hand to help ensure those taking the most complex or taking a number of drugs has the oversight and assistance they need to manage their lifestyles, their medications and to obtain overall good health.
9. **Bulk prescription programs.** Do you support establishing a bulk prescription drug program that would provide lower cost prescription drugs for public employees?

   Yes X No

   Do you support establishing this same program for *all* Massachusetts residents?

   Yes No

**While bringing down the costs of prescription drugs for the greatest number of people is certainly a worthy goal, I would need more information on the administrative costs of such a program.**
D. Housing

In the last ten years, the need for affordable housing has increased, while funds for affordable housing have decreased, federal and state. Currently there is a 10-year waiting list for a rental voucher, and the average rent for a two bedroom apartment requires a wage 50% higher than the median Massachusetts wage. Half of families in Greater Boston alone pay over 30% of their income in housing and utilities costs—and 25% of households pay more than half their income to housing. This is unsustainable. It has led to expanding economic inequality, increased homelessness, and damage to our economy, as talented workers often leave the state for less expensive regions.

1. Please share your personal values and principles regarding affordable housing. How would you ensure that there is suitable housing for all who need it, within reasonable distance of job opportunities? How would you address the need to link housing, jobs and transportation? How would you tackle homelessness?

If we do not create the supply of housing that we need, we will not be able to attract and keep the families and workers necessary to meet the tremendous growth potential of our state economy. That means addressing the urgent need for affordable housing options for young people, whether those be apartments, condos or single family homes. This need is particularly acute around urban areas and town centers. To meet this challenge, the state must partner with communities to lessen the opposition and restrictions on new housing and help communities absorb growing populations. Creating more affordable housing is also a key element in addressing income inequality given the high ratio of lower income family budgets that go towards their home.

2. Optional/As Applicable: Please indicate work you personally have done to advance your principles on housing (legislation, community work, published writings, etc).

3. Housing Authorities. Governor Patrick has proposed consolidating the Housing Authorities to six regional authorities, from the current 242 authorities. The legislature appears reluctant to agree to this reform, in part because it would reduce local control. What is your position?

I am not convinced that creating larger state bureaucracy removed from the communities it is designed to serve will solve the problems this legislation sought to address. Of particular concern to me, as a former town official from a small community, is that attention and resources will inequitably flow to larger communities in these new regional authorities.

4. Affordable Housing. What would you do to increase the number of affordable housing units in the State? What would you do to ensure that no low-income family has to spend more than 50% of their income on housing and related expenses; and that fewer than a quarter of families spending more than 33% of income on shelter?

The basis of any affordable housing strategy must first focus on ensuring there is adequate supply of subsidized housing for three groups: Those in most financial need on the verge of homelessness, seniors, and veterans.
Next, we need to work to ensure that we are creating enough workforce housing to meet the demands of a growing population and to fuel economic growth, particularly in and around urban areas. One step would be to discontinue the practice of allowing communities to count senior housing toward their affordability percentage. This practice has given communities a pass on creating enough affordable housing to accommodate young people and low- to middle-income working families.

5. **Temporary Housing Transitions.** What would you do to move homeless families and individuals out of motels and shelters and into permanent housing?

Before we do anything to address homelessness, we have to be honest about the extent of the problem. Currently, we count the homeless and impose tough regulations in admittance to shelters, which is particularly challenging as they relate to battered women having to establish proof of violence against them. With the most accurate count possible, I will push for the support programs necessary to solve the problem in a real way. Those solutions should include integrating health and social services and worker training into shelters to create ladders of opportunity for the homeless and give them a sense of hope for a better life. Motels should be an emergency option – not a long-term or even medium-term – solution to homelessness. First, motels are often in poor locations, not near shopping or schools. They do not provide adequate access to support programs. And cities and towns where they are located are denied the hotel/motel tax revenues when the state takes over units to house the homeless. We cannot continue to allow this “band-aid” as part of any lasting solution.

6. **Regulation Reform, Development and Preservation.** Would you support reforms to update our outmoded zoning, subdivision, and planning laws, in such a way as to encourage balanced development and land preservation?

   Yes X  No

It makes sense to review these laws regularly to determine whether and how they should be changed to adapt to changing demographic and economic trends.
E. Revenue and Taxation

Because of income tax cuts and the effects of the recession, Massachusetts has lost nearly $3 billion in revenue over the last 12 years. We now collect less revenue than 21 other states, and our tax revenue is below the national average. Since 1982, local aid has dropped 58%. Cuts to the moderately progressive state income tax has meant increasing reliance on fees, sales, gas and property taxes, exacerbating the overall regressiveness of our revenue. Regressive taxation strains low- and middle-income families, and reduced revenue collection curtails our ability to invest in vital infrastructure.

1. What principles do you bring to considerations of state revenue and tax reform (individual and corporate)? How should we raise more revenue to adequately fund our communities for the future?

   It is no secret that there exists in this nation – and in our Commonwealth – an ever-widening trust gap that between the people and the leaders elected to serve them. Before we can go to the taxpayers and ask them to contribute more in the way of tax dollars to support the initiatives we need to keep Massachusetts on a progressive path, we need to be able to explain and convince them that the revenues the state currently collects are being used as effectively and efficiently as possible. First and foremost, I would seek to reform the Commonwealth’s tax incentive programs to determine which are working as intended and which should be revisited or even revoked. Those recouped revenues can then be used to fund other more worthy government incentive programs or be redirected to other areas of the state budget.

2. Optional/As Applicable: Please indicate work you personally have done to advance your principles on revenue and taxation (legislation, community work, published writings, etc).

   As a finance committee member and a member of the Board of Selectman in Lancaster during the recession and budget crisis of the early 1990’s, I was responsible for setting the tax rate and balancing our community’s most pressing fiscal needs with our residents’ and businesses’ ability to contribute more during trying economic times.

3. Tax Rates for Upper Incomes. Do you support increasing income taxes on the wealthiest residents of Massachusetts?

   Yes      No

   I first would need a full analysis of what effect raising rates will have on our ability to attract new businesses, keep Massachusetts businesses from relocating elsewhere and promoting job creation and economic growth.

4. Automatic Tax Decrease Triggers. Do you support halting the automatic decrease in state tax when Massachusetts state revenues grow four quarters in a row?

   Yes      No X

   Those in government must address and seek to repair the trust gap that exists between elected leaders and the people they serve. As part of that,
government should keep its promises and not change course on fiscal policies without making a convincing case to the public that such a move is fiscally and economically necessary.

5. **Capital Gains.** Do you support increasing the capital gains tax (with safeguards to protect seniors)?
   - Yes
   - No

   I would not support isolated changes to our tax structure at this time without a comprehensive study of the state’s tax system as a whole.

6. **Progressive Taxation.** “An Act to Invest in Our Communities” was designed to raise significant revenue while making our tax code more progressive, but it has not passed the legislature. Would you support a renewed effort to pass this or similar legislation?
   - Yes
   - No

   I would not support major changes to our tax structure at this time without a comprehensive study of the state’s tax system as a whole.

7. **Corporate Tax Breaks.** Do you support eliminating or substantially reducing corporate tax breaks?
   - Yes
   - No

   As stated above, since the start of my campaign, I have been talking about our need to conduct a comprehensive review of all the Commonwealth’s tax incentive programs to determine which are working as intended and which are not. Those that are not need to be either reworked or revoked so that the funds can be reallocated in a more productive and efficient way – either toward new, more effective tax incentive programs or redirected to other necessary spending. This effort will require the cooperation of businesses and industry sectors to open their books and show us how this public money is being used to meet the goals and standards set out when these tax breaks were first granted.

   Do you support repealing or significantly reducing the Film Production Tax Credit?
   - Yes
   - No

   The Film Production Tax Credit program should undergo the same review and inspection as described above.

8. **Clawbacks and Transparency in Corporate Tax Breaks.** Do you support increasing corporate tax break transparency and clawback provisions?
   - Yes
   - No

   As described above, those tax incentives not working as intended should be discontinued and the state should pursue clawback efforts. We should
pursue whatever legislative changes are necessary to ensure the Commonwealth receives the information it needs to make a solid determination on the efficacy of these tax incentives programs and has the authority and ability to recoup funds when necessary.

9. **Graduated Income Tax.** Would you support a state constitutional amendment creating a Massachusetts progressive income tax?
   - Yes
   - No

   I am open to the concept. However, I would not support any major isolated changes to our tax structure at this time without a comprehensive study of the Commonwealth’s tax system as a whole.
IV. ADDITIONAL COMMENTS

*Please compose your answers directly in the document, underneath the question. Limit answers to 250 words or fewer. No attachments.*

Use this space to add any other issues important to your vision for Massachusetts or any other matter you think progressive voters should know about your candidacy.

As CEO of the Democratic National Convention in Charlotte in 2012, I was proud to oversee what was widely hailed as the most inclusive and welcoming national political convention ever. If elected, I would be the first openly gay Lieutenant Governor in the Commonwealth and the nation. I fully plan to use the unique platform I will have as a result of my election to be a fierce advocate for equality and fairness for all.