



# PROGRESSIVE MASSACHUSETTS

statewide, grassroots organizing for progressive change in Massachusetts

## 2014 STATE RACES ENDORSEMENT QUESTIONNAIRE

**Date:** February 3, 2014  
**Candidate:** Tom Conroy  
**Office Sought:** Treasurer of the Commonwealth  
**Party:** Democrat  
**Web Site:** [www.tomconroy.org](http://www.tomconroy.org)

### CANDIDATE CONTACT INFO

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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](mailto:deborah@progressivemass.com).

Please be in touch with Executive Director Deborah Shah with questions, at 917-922-7947 or by email.

CANDIDATE:

OFFICE:

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

**I. About You****1. Why are you running for office?**

I am running for state treasurer because I want to lead Massachusetts forward as a commonwealth of opportunity. I want to improve access to education, jobs, and capital for the people of Massachusetts, particularly for the working poor. In today's tough economic times, we need to find a better balance between prudent financial management and helping the most vulnerable in our society. I want to create a new vision for our state that focuses on economic growth, job training, education, and targeted investments to spur the creation of middle class jobs.

I believe that inequality is the defining challenge of our time. I want to use the levers and authority of the state treasurer's office to fight for fairness, economic justice, and opportunity for all. Our next state treasurer must not only be an expert financial mechanic, but also proactive and focused on the long-term. We need a leader who will expand the state treasurer's role, offer creative ideas, conduct new and potent analysis, affect change, and ultimately help more people in Massachusetts who face disadvantages through no fault of their own. If elected, I will be an active and dynamic treasurer and will offer creative solutions to tackle the tough challenges facing our state and working families throughout the Commonwealth.

**2. What prepares you to serve in this capacity?**

As a four-term state representative, I authored several laws including budget language that has strengthened the state's credit rating and pension reforms that resulted in reducing the state's liabilities while persevering benefits for retirees. This session, I am also leading two major legislative efforts: crafting a bill to raise the minimum wage in Massachusetts and another to improve our welfare system in order to help the most disadvantaged find new opportunities and jobs.

The combination of my education, management consulting, financial services, and public sector experience makes me uniquely well-qualified to be state treasurer. My education includes two masters' degrees, one in international economics, the other an MBA in finance. As a management consultant with state agencies around the country, I led teams that developed best practices in the areas of budgeting, non-tax revenue generation, and financial management. Our teams helped states run more efficiently and effectively, and expand budgets without raising taxes. As a management consultant advising large corporations, I offered guidance on strategy, operations, and financial management to help companies grow. As a risk management consultant, I helped banks, investment management companies, and insurance firms manage their balance sheets and risks.

As a state representative, I have served as the Vice Chair of the Health Care Financing Committee, which oversees over a third of the Massachusetts budget. I have also served on the House Ways & Means Committee, and the Joint Committee on Public Service, which has

CANDIDATE:

OFFICE:

jurisdiction over the state pension and health care security trust funds.

3. What do you think is the proper role of government in Massachusetts residents' daily lives?

Our state government should ensure economic justice and equality of opportunity for its residents. Massachusetts should be an opportunity society in which all individuals willing to learn new skills and work hard have a chance to succeed. The best safety net program for any individual is a steady job with good wages and benefits. As elected officials, we must ensure that access to quality education, employment, housing, child care, and health care are attainable for working families, and that everyone has an opportunity to achieve the American Dream and create a better life for themselves and their children. It is vital that we reinvest in those on the edge of poverty who want work but can't find jobs, or want to work more, but don't have the support structure to sustain low-wage employment.

Our government must make investments for the common good, which include improving our infrastructure: public transportation, water systems, public parks, and the like. Government must also provide essential services that the private sector will not: public safety, a judicial system, and a social and economic safety net for those who are facing significant obstacles and challenges each day.

In short, government helps provide the opportunities, infrastructure, and safety-net programs that keep our society together.

4. If elected, what would be your top three priorities?

- Job Creation: Connecting the unemployed and underemployed with the approximately 120,000 open jobs through targeted workforce training would be a top priority. I would prioritize smart economic and job growth policies. As treasurer, I would invest more in companies based in Massachusetts with track records of job growth and increase investments in local banks so these banks can loan more to our small businesses, the engines of new job growth. In the long term, getting more people into good jobs will reduce spending on state-subsidized programs in the areas of child care, public assistance, health care, housing, energy, and transportation, among others.
- Education: Education is the path to opportunity, the great equalizer, the key to future success. As Massachusetts' next state treasurer, I will build upon our state's commitment to excellence and equal opportunity in our public school system by investing in universal pre-k education, increasing funding for our K-12 schools as chair of the Massachusetts School Building Authority, and expanding the higher education student loan program managed by the treasurer's office.
- Local Aid: Massachusetts has the most lucrative and successful state lottery in the nation. In the past few years, our lottery has generated over \$900 million in annual profits, all of which were reinvested in education systems throughout the Commonwealth. Ensuring that the lottery remains profitable, monitoring the introduction

CANDIDATE:

OFFICE:

of casinos, and protecting local aid for the 351 cities and towns throughout the Commonwealth would a top priority if elected treasurer.

## **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?*

Many of the challenges facing families, businesses, and government today stem from a disturbing and growing phenomenon: income inequality. Each day a growing number of Massachusetts’ families have fewer opportunities to create a better future, despite how hard they work. In the past three decades, our economy has changed. Good middle class jobs have been replaced with low-wage jobs with few benefits and part-time hours.

As state treasurer, I will work every day to ensure fairness, justice, and opportunity for all. No one working a full-time should be living in poverty. Our Massachusetts economy should work for anyone who is willing to work. As the author of legislation to increase the minimum wage, which will be debated in the House of Representatives this session, I believe that raising the minimum wage is the first step toward addressing income inequality. Doing so will help tens of thousands of working families throughout the Commonwealth. We must also expand the Earned Income Tax Credit, increase funding for workforce training, and ensure workplace protections for low-wage workers.

We must invest in those who need us the most: our youth, the unemployed and underemployed, and those seeking upward economic mobility. A poverty commission bill I authored will help us analyze the root causes of poverty in our state and offer recommended solutions for reducing it. As Massachusetts’ next state treasurer, I will focus on poverty reduction and use the many levers within the treasurer’s office to address economic justice

CANDIDATE:

OFFICE:

and seek economic opportunity for all.

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).

As House Chair of the Labor and Workforce Development Committee, my focus this year has been to craft a bill to raise the minimum wage and increase funding for workforce training. Raising the minimum wage in Massachusetts will lead to economic expansion and more job creation, because nearly 500,000 workers will have more income to spend.

I have led the effort to increase workforce training for the 400,000 residents of our state that want to work but cannot find good jobs. I authored a bill to dramatically increase funding for education, skills development, and workforce training to help these 400,000 residents obtain the skills they need to obtain the 120,000 jobs that are open in Massachusetts. Also, in the FY14 budget, I advocated for and was successful in obtaining a significant funding increase in the Summer Jobs for At-Risk Youth Program, “YouthWorks”. This vital program helps thousands of at risk youth find summer employment and its return on investment in developing the career readiness skills for these youth is significant.

I also authored a bill creating a commission to study poverty throughout the commonwealth and how poverty can be reduced. Through this commission, we have an opportunity to research and study the root causes of poverty, income inequality, violence, educational barriers, and the potential long-term municipal and state government savings that can result from effective poverty reduction initiatives. In doing so, we can craft creative solutions to lower poverty and unemployment rates and redirect state funding towards creating new jobs.

3. **Minimum Wage.** Do you support:

Raising the wage to at least \$10.50/hour:	Yes <input checked="" type="checkbox"/>	No
Indexing automatic yearly increases to inflation:	Yes <input checked="" type="checkbox"/>	No
Increasing tipped wages to 60% of the minimum wage:	Yes	No

From its creation, the value of the minimum wage rose steadily until it reached a high point in 1968. Today, the minimum wage remains 25 percent below its 1968 level. Thus, a full-time minimum wage worker earned the equivalent of \$21,400 annually in 1968 (measured in inflation-adjusted 2013 dollars), about \$5,000 more than a minimum wage worker actually earns today. If this year we can increase the minimum wage to that 1968 level, which equates to over \$10.50/hour, then indexing the minimum wage thereafter would ensure it retains its value and keeps pace with the rising costs of transportation, food, housing, child care, healthcare, and other necessities.

We should also increase significantly the tipped minimum wage, which has not been raised since 1999. It should be noted that raising the minimum wage is the most important goal for tipped workers too: all tipped workers are guaranteed a minimum wage, regardless of what they earn (or don't earn) in tips. Increasing the tipped minimum wage will help ensure that the business community shares in the cost of an increased earned income tax credit, which will put more money in the pockets of the working poor, many of whom are single mothers working as

CANDIDATE:

OFFICE:

tipped employees in the hospitality industry.

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

As House Chair of the Committee on Labor and Workforce Development, I feel strongly that we should not justify a minimum wage increase by cutting unemployment insurance benefits. There are still far too many Massachusetts families who have yet to recover from the Great Recession. If one believes that increasing the minimum wage will lead to economic expansion, as most economists do, then no concession is required for the business community on unemployment insurance.

A legacy of the Great Recession is unusually high long-term unemployment, a sign of the depth of the recession, not workers' efforts or generous benefit levels. Any savings businesses would enjoy if we were to cut unemployment insurance benefits would be greatly outweighed by the harm it would cause to those struggling to get through a temporary setback and reenter the workforce.

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

No one should have to go to work ill because he or she is afraid of losing his or her job. Moreover, single mothers should not have to choose between sending their sick children to school or going to work. Daughters and sons should not be discriminated against at work or fired because the parents they care for in their home need emergency care. Thousands of families lack the income to build a support structure to adapt to these situations; they should not be penalized because they are not rich. Studies have also shown that low-wage workers are more likely to lack affordable employer provided health insurance, sick days, and paid time off.

As House chair of the Joint Committee on Labor and Workforce Development, I am crafting a bill to address this inequality and prevent the working poor from being penalized further.

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

Over 100 year ago, when Massachusetts' legislators passed the first minimum wage law in the United States, they required wages to be sufficient "to supply the necessary cost of living and to maintain the workers in health." To comply with the intent of this law, an individual working full time in Massachusetts today would need to earn \$28,500 annually to be economically



CANDIDATE:

OFFICE:

independent. A living wage for single parent families with one child amounts to nearly \$52,000 annually, equating to about \$25.00/hour.

More and more working families struggle to put food on the table, make a living wage, send their kids to college, or afford basic healthcare. Consequently, businesses have fewer customers and the economy suffers as consumer spending shrinks.

A “Job Creation and Quality Standards Act” is an interesting concept that is worthy of study and analysis. It aligns with my principles and goals and I would like to be a part of an effort to explore this idea further.

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

I am the author of legislation that would encourage Employee Stock Ownership Plans (ESOPs) in Massachusetts.

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  No

As the next state treasurer, I will continue to support the growth and development of community banks. These banks are the primary sources of capital for local businesses that hire local residents into new jobs. In 2009 while considering a run for state treasurer, I shared with Steve Grossman the idea of investing the state’s reserved deposits with local banks instead of overseas or with a California-based mutual fund (as it had been invested). Once elected, Treasurer Grossman implemented this idea successfully. I want to continue to expand the initiative, with a goal of investing more than \$1 billion at over 100 local banks.

CANDIDATE:

OFFICE:

**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.*

Neither businesses nor our government should be creating obstacles for parents obtaining jobs because they lack affordable child care. In many instances, government should actually encourage parents to work by offering high-quality child care and early education for their children. Early education programs bolster educational attainment and help children enter school on equal footing, which is particularly important for children from poor communities and children who speak a language other than English at home. Access and affordability of early education programs is critical if we want all children to have equal opportunities to do better in school, increase graduation rates throughout the state, and help the next generation become productive members of society. Universal access to comprehensive, high-quality, early education is essential in order to ensure that effort matters over location and opportunity persists over circumstance.

We must also ensure that college remains affordable and within reach for all who are willing to work for it. Today, students and families are incurring massive amounts of debt to pay for higher education. One major reason students don't finish community college in Massachusetts is the cost. If elected state treasurer, I would expand the student loan authority within the treasurer's office so that hard-working students can obtain a higher education, a better future, and a better life.

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).

The Early Intervention program in our state assists thousands of children up to age three who have developmental delays. Increasing funding for early intervention services has been one of my top legislative priorities since I entered the legislature. As the father of triplets who graduated from Early Intervention, I have seen firsthand the value of this program. Most importantly, I recognize the fabulous return on investment of this program. By investing in these essential services early, we can obviate the need for costly special education services, saving towns, cities, and state government tens of millions of dollars each year.

I have led the effort to increase workforce training for the 400,000 residents of our state that want to work but lack the skills to get good jobs. I am the author of a bill to dramatically increase funding for education, skills development, and workforce training to help these 400,000 residents obtain the skills they need to obtain the 120,000 jobs that are open in Massachusetts. We have not adequately prioritized workforce training. We must do more.



CANDIDATE:

OFFICE:

In 2009, Speaker DeLeo appointed me as his designee to serve on Governor Patrick's Science, Technology, Engineering and Mathematics (STEM) advisory council. This council brings together educators, legislators, and business and community leaders in order to promote greater understanding about STEM, its importance in students' academic achievement, and developing innovative ways to prepare of our youth for 21<sup>st</sup> Century jobs.

3. **Achievement gaps.** What would you do to address persistent racial and economic achievement gaps in education?

Massachusetts invests a below-average share of our state's economic resources in public education. Since 2001, spending on early education and care has fallen by 25 percent. In Massachusetts, 40 percent of our third graders cannot read proficiently. And the inequities run deeper and are evident even earlier: by age three, children of parents who are professionals have vocabularies 50 percent larger than children from working class families and 100 percent larger than vocabularies of children whose families receive welfare. Meanwhile the cost of child care is prohibitive for many families in Massachusetts. Today, almost 20 percent of all Massachusetts children up to age five are either in state-subsidized child care (30,000 children) or on waiting lists (40,000 children).

Many of the achievement gaps we see today persist because children do not start kindergarten on equal footing. High-income families have the luxury to spend more time and money educating their children. I would advocate for public education to begin as early as possible, ensuring that every child, regardless of his or her zip code, is not playing catch-up before age five. Universal access to comprehensive, high-quality early education programs can start with the treasurer's office leading the way and building pre-k classrooms throughout the state through the Massachusetts School Building Authority program.

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  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
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  No

CANDIDATE:

OFFICE:

**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.

I am proud that Massachusetts has been a leader in health care insurance and delivery over the past decade. It is essential that everyone in Massachusetts have access to affordable and high quality health care. We must ensure that regardless of income and geographical location, families across our state can not only afford quality health insurance policies but that there are quality hospitals, doctors and community health centers in every region of our state.

As Vice Chair of the Health Care Finance Committee last session, I immersed myself in our Commonwealth's health care debate. I read thousands of pages of reports and analysis, met with interested parties, and helped draft the Health Care Quality Improvement and Cost Containment Law of 2012. This law caps health care spending in our state while encouraging new models of health care service, and focuses not on procedures, but on outcomes, positive results, and better health for our residents.

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

I supported and helped draft sections of the 2010 Small Business Health Care Cost Containment Act, giving the Massachusetts Division of Insurance the regulatory authority to reject excessive or unreasonable premium increases on small businesses. Under this law, small businesses can group to purchase health insurance in order to obtain lower premiums and better terms and conditions for their employees.

3. **Single Payer and Public Option.** Do you support moving Massachusetts to Single Payer insurance?  
Yes            No

Massachusetts is moving towards a single payer system for the vast majority of its citizens, and will continue to do so over the coming years.

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

I support a public option as one alternative way to provide quality and affordable health insurance.

CANDIDATE:

OFFICE:

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

As Vice Chair of the Health Care Finance Committee last session, I immersed myself in our Commonwealth's health care debate. I read thousands of pages of reports and analysis, met with interested parties, and helped draft the Health Care Quality Improvement and Cost Containment Law of 2012. This law caps health care spending in our state while encouraging new models of health care service, and focuses not on procedures, but on outcomes, positive results, and better health for our residents.

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

We must devote more resources toward the mental health of our residents. We should be more forthright discussing mental health challenges, the needs in our society, and remove the labels and discrimination that all too often come with such a dialogue. Mental health needs are more prevalent than many in our commonwealth want to acknowledge, limiting the amount of funding we devote to providing necessary mental health services. We can and must do better in this area. In addition, we should respect the dignity of the mentally ill by assisting them manage their own mental health care more fully.

6. **Health disparities.** What steps would you take to reduce racial and income disparities in health outcomes?

It is important that we continue to focus on and address income disparities in health outcomes. For too long and far too often, the working poor and families at the lower end of the economic scale have not had access to affordable high quality healthcare. These families, some who are the most vulnerable families within our communities, are sometimes facing extraordinary obstacles and navigating complex barriers that can prevent them from accessing timely preventative care. We need to continue to address health disparity outcomes and craft creative legislative solutions where appropriate.

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

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

Yes  No

9. **Bulk prescription programs.** Do you support establishing a bulk prescription drug program that would provide lower cost prescription drugs for public employees?

PROGRESSIVE MASSACHUSETTS – ENDORSEMENT QUESTIONNAIRE

2014

CANDIDATE:

OFFICE:

Yes  No

Do you support establishing this same program for *all* Massachusetts residents?  
Yes  No

I would like to study this issue more closely.

CANDIDATE:

OFFICE:

**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 want to address the underlying and multi-faceted barriers to self-sufficiency, break the cycle of poverty and dependency on subsidized government programs, and create meaningful opportunities for the impoverished to get jobs and become economically independent, we need to reexamine the way we view our public assistance programs. We need to take a holistic, comprehensive approach to assisting families experiencing a housing crisis and those living in subsidized housing. Families will only be able to transition out of subsidized housing if we recognize and address all their needs, including access to education, job training, child care, and transportation.

We must not only ensure those who need housing assistance have access to it; we must lessen the cliff effect families encounter when transitioning out of subsidized housing. We can lessen this effect by allowing families more work-related expense deductions. Rather than increase rent share as families make more income, we can take that additional income and put it in escrow accounts for these families. This additional savings can then be used for a down payment on a house, apartment, education, buying a car, or for any other related purpose.

It is unrealistic to expect those living in poverty to be able to change their circumstance simply because they obtain low-wage employment. If we create the type of holistic programs that enable families to save money and keep their subsidized transportation, child care, and housing longer, families might have a chance to break the intergenerational cycle of poverty.

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

Last fall, I championed a welfare reform bill aimed at investing \$20 million into education, workforce, and training for those receiving public assistance and I managed its passage in the House of Representatives. This bill aimed to reduce the cliff effect referenced above by including an increase in the work-related expense deductions, providing additional funding for child care, and providing more support for families as they transition off of public assistance.

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?

CANDIDATE:

OFFICE:

We need to do more to ensure that there are more affordable housing options throughout the entire state. I believe that we can achieve this goal while continuing to afford some local control over housing decisions.

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?

In my eight years in the Legislature, I have an exemplary record in supporting affordable housing initiatives despite the towns I represent voting in favor of the 40B repeal ballot initiative. This fall I supported, advocated, and voted for a \$1.4 billion housing bond bill to help families throughout the commonwealth find affordable and safe housing. Under this legislation, we will modernize and invest in additional public housing, allow for home modifications for seniors and disabled homeowners, and extend the Massachusetts Low Income Housing Tax Credit. In addition, we allocated \$305 million for the Affordable Housing Trust Fund and \$135 million for the Housing Stabilization Fund in order to provide additional resources and create affordable rental and homeownership opportunities throughout the state.

We must also do more to address the underlying issues for why too many families in our state need state subsidized housing. More affordable housing, in all corners of our state, is likely one of the barriers to emerging out of poverty and an issue that the state needs to continue to address. Under legislation I authored and hope will become law in 2014, a commission will be created to study poverty throughout the commonwealth and how poverty can be reduced by joining together the public, private and non-profit sectors. Through this commission, we have an opportunity to research and study the root causes of poverty, income inequality, violence, educational barriers, and the potential long-term municipal and state government savings that can result from effective poverty reduction initiatives.

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

Too many families in our state are being housed in shelters, hotels and motels. Far too often these families are temporarily housed in cities and towns far away from their jobs, their children's schools, their extended families, and community support. Even during these tough economic times, we must increase funding and the amount of resources we dedicate to addressing this problem. At the same time, we need more affordable housing for these families to transition into. It is essential that we prioritize long-term investments over short-term quick fixes. The return on investment in getting families out of motels and hotels and into long-term affordable housing units is clear.

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?



PROGRESSIVE MASSACHUSETTS – ENDORSEMENT QUESTIONNAIRE

CANDIDATE:

OFFICE:

2014

Yes  No

CANDIDATE:

OFFICE:

**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?*

Currently, we spend billions of dollars each year on critical state programs including: health care, child care, housing, and public assistance, among others. We spend far less investing in opportunities for the working families dependent on these programs in order to provide them with the necessary tools to emerge out of a life of poverty and provide a better life for themselves and their children.

Today, approximately 75 percent of the state budget is consumed by spending on subsidized health care, human services and education, with another 12 percent allocated for fixed debt service and pension costs. This leaves only 13 percent of the state's revenue available for transportation, public safety, housing, job training, and economic development – all of which are vital for the economic future of our state.

There are countless ways to raise revenue. One example of a new revenue generating idea is a bill I authored this session, a carbon tax. Under this revenue-raising mechanism, we could protect our environment, preserve choices for businesses and consumers, and set up a mechanism designed to spur statewide innovation and economic growth. This is just one example of the type of creative idea that could be explored as we create a new vision for our budget going forward.

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).

This session, I co-sponsored legislation which will distinguish Massachusetts as a leader in climate change policy. Under this legislation, *An Act relative to shifting from carbon emissions to transportation investment*, we recognized the effects of individual carbon use on climate change policy and strived to achieve four overarching goals. First, we created a carbon tax – or anti-pollution tax – as an effective mechanism to change behavior in a positive manner, preserve choices for businesses and consumers, and reduce the amount of greenhouse gases (GHG) emitted in our commonwealth. Second, we set up a mechanism designed to spur statewide innovation and economic growth in the form of new alternatives to fossil fuel use. Third, this legislation is designed to be a part of a larger conversation addressing our state's ongoing transportation and revenue needs. Finally, this legislation is flexible, progressive, and much of the revenue raised through the tax would be returned to low-income families.

CANDIDATE:

OFFICE:

During my eight years as a legislator, I also initiated laws that will protect taxpayers and retiree benefits at the same time. I authored a comprehensive study that detailed fiscally sound ways to keep our retiree benefit plans solvent by using non-tax revenues to fund our ongoing pension and other post-employee benefit obligations. By utilizing dedicated non-tax revenues to fund ongoing debt obligations, we can serve the Commonwealth's best interests, create a sustainable system going forward, and maintain a sense of fairness to public sector employees and private sector taxpayers.

3. **Tax Rates for Upper Incomes.** Do you support increasing income taxes on the wealthiest residents of Massachusetts?  
Yes  No
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
5. **Capital Gains.** Do you support increasing the capital gains tax (with safeguards to protect seniors)?  
Yes  No
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
7. **Corporate Tax Breaks.** Do you support eliminating or substantially reducing corporate tax breaks?  
Yes  No

I continue to work closely with my colleagues on this issue, particularly House Revenue Committee Chair Jay Kaufman. I have read and have a keen understanding of the myriad corporate tax credits that exist in our tax code. While some make sense – for example, tax credits for hiring the handicapped – there are too many corporate tax breaks overall. Dozens of industries have at least one, and thus corporate tax reform becomes an issue in which achieving fairness becomes particularly complicated. I will continue to study this issue and work with my colleagues to craft legislative solutions where appropriate.

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

I continue to study this issue closely. Since introducing the Film Production Tax Credit, many states have duplicated our program and this has diminished its use and effectiveness. I also continue to pay close attention to the Department of Revenue's reports on the effectiveness of the Tax Credit program. As treasurer, I would conduct my own analysis of this program in order to gain a better understanding of its effectiveness.

PROGRESSIVE MASSACHUSETTS – ENDORSEMENT QUESTIONNAIRE

2014

CANDIDATE:

OFFICE:

8. **Clawbacks and Transparency in Corporate Tax Breaks.** Do you support increasing corporate tax break transparency and clawback provisions?

Yes  No

9. **Graduated Income Tax.** Would you support a state constitutional amendment creating a Massachusetts progressive income tax?

Yes  No

CANDIDATE:

OFFICE:

**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.

If elected your next state treasurer, I will lead by example, based on sound principles such as far-sighted financial management and core values such as economic justice and creating opportunities for all. I will offer compassion for the less fortunate, tempered by the need for responsible and accountable budgeting. I will respect for the covenant we have made with public sector employees and their retirement benefits, while having the foresight to ensure the solvency of our pension system. I will encourage a vibrant business community and public-private partnerships, while preserving the rights of employees to earn living wages in stable work environments.

This balancing act between compassion and prudence, between heart and head is critical for our future. I carry this sense of balance within me each day, and I want to apply it successfully as our next state treasurer.