Mission statement
The Massachusetts Business Roundtable’s (MBR) mission is to strengthen the state’s economic vitality. MBR engages with public and private leaders to develop public policy solutions that improve the long-term health of the Massachusetts economy and make this a highly desirable place to do business.

Value proposition
MBR applies the strategic perspective of its membership to assist the Commonwealth’s elected and appointed leaders in resolving complex public policy issues in ways that strengthen the state’s long-term social and economic prosperity. In order to enhance that perspective, MBR members are provided access to an influential network of public officials and business leader peers; educated on state public policy issues; provided a forum to formulate and influence public policy; and charged with defining the public policy agenda for MBR to pursue through research and advocacy.
Message from the Chair

For more than three decades the Roundtable and its business leader members have provided an important voice for the business community working to develop and implement public policies that strengthen our long-term economy. Serving as Chair during the past four years has presented numerous opportunities—through the Governor’s Economic Development Council, our work with legislative leaders to repeal the software services tax and most recently on Mayor Walsh’s economic development transition team—to advance the Roundtable’s competitiveness agenda for the Commonwealth.

With our many partners and through the dedication of our members, we have achieved measurable results in areas including STEM education, health care, transportation, economic development and competitiveness. The Roundtable has made significant contributions on the implementation of Chapter 224, the landmark health care cost containment bill. The Roundtable continues to lead on STEM education through the Governor’s STEM Advisory Council, development of the new statewide STEM Plan and funding for STEM in every region. Our work with the business community helped to produce meaningful reforms in our transportation system, as well as a new statewide plan for investing in roads, bridges and transit projects across the state. I am also proud that the business community continues to work collaboratively with the Patrick Administration and Legislature to improve both the perception and reality of doing business in Massachusetts.

Looking back at the past several years, the Roundtable made a seamless transition from long-time Executive Director Alan Macdonald to JD Chesloff, which honored Alan’s outstanding legacy of achievement and welcomed JD’s vision for continuing MBR’s important work. The Roundtable’s membership has grown in recent years with the addition of diverse voices from companies representing many different industry sectors. Member engagement is strong, members are impacting public policy, and the organization is on solid financial footing with a talented, committed staff.

One of the hallmarks of any good organization is that it has a strong succession plan in place. I am confident that our incoming Chair, A.D. Makepeace Company CEO Michael Hogan’s vast private and public sector experience and deep understanding of complex public policy issues will energize and build on the Roundtable’s member-driven competitiveness agenda in 2014 and beyond.

I want to thank all my fellow Roundtable members for your support, engagement and dedication to the organization during my tenure as Chair. I also want to thank the staff of the Roundtable for their commitment to MBR’s mission and for always finding opportunities to add value for our members. Finally, thank you to all our partners in the business community and in the public sector for your collaboration and commitment to making Massachusetts a better place to live, work and raise a family.

Donna Cupelo
Roundtable Public Policy Impact 2013

**Transportation**
The Roundtable’s Transportation Task Force worked with the Legislature as well as MassDOT Secretary Richard Davey and members of the business community throughout the legislative process advocating for continued reforms and long-term funding solutions that were adopted in legislation to invest in roads, bridges and transit projects that strengthen our economic competitiveness.

“The transportation finance legislation would not have happened as successfully as it did were it not for the involvement and advocacy of the Roundtable.”
Richard Davey, Secretary and Chief Executive Officer, Massachusetts Department of Transportation

**STEM Education**
The Roundtable continued to lead on STEM education through the Governor’s STEM Advisory Council, the creation of a new statewide STEM Plan, successfully advocating for $1.5 million in state funding and transitioning leadership of the STEM Initiative to Congressman Joseph Kennedy.

**Tax Policy**
The Roundtable partnered with business groups, trade associations and public officials to create a tax environment conducive to job creation and investment including the repeal of the software services tax. MBR’s work on the Department of Revenue’s Advisory Council also helped to advance DOR’s new Early Mediation Pilot program and led to improved communications between DOR and the business community.

**Health Care**
The Roundtable’s report on best practices in corporate wellness helped to inform the Department of Public Health’s creation of a new Model Wellness Guide, while highlighting the innovative wellness practices of MBR members including Consigli Construction, Northmark Bank, Blue Cross and UMass. MBR worked to reduce administrative burdens on employers serving on the Health Connector’s Employer Advisory Council and on the implementation of Chapter 224 serving on the Health Policy Commission’s Advisory Council.

**Workforce Training**
The Roundtable teamed up with the Workforce Solutions Group and Commonwealth Corporation on workforce training including implementation of $5 million from the Workforce Competitiveness Trust Fund for regional training partnerships across the state.
Roundtable Collaborations in 2013

The Roundtable’s members value and promote collaboration with leaders in government, industry, non-profit organizations, higher education, as well as with our partners in other business groups. MBR staff are in constant contact with leaders in the Administration and the Legislature to exchange ideas and provide input from the business community. There were numerous policy successes in 2013 resulting from strong collaboration, and the Roundtable was proud to play a part in those success stories.

...with DOR

Tax policy and administration are perennial priorities for the Roundtable, which this year worked closely with the state’s Department of Revenue (DOR) through Commissioner Amy Pitter’s new 16-member Advisory Council that included MBR member companies General Electric, Partners Healthcare and Ernst & Young, as well as MBR Deputy Director Chris Kealey. MBR hosted two conversations with Commissioner Pitter and members about ways to improve interactions between the business community and DOR in areas including dispute resolution, audit practices and customer service.

Working with MassPort

Roundtable staff and members worked with MassPort CEO Thomas Glynn and his team on opening up more non-stop flights from Logan Airport to key business destinations in China, Latin America and Japan. Roundtable executives from GE, iRobot, Siemens and Colliers International joined Mr. Glynn as well as Secretary Davey, Joint Transportation Committee Chairmen Senator Thomas McGee, Representative William Straus, and Japan Airlines Chairman Masaru Onishi announcing plans to resume non-stop service on the 787 Dreamliner between Boston and Tokyo. The Roundtable also joined Governor Patrick and other leaders to celebrate non-stop service from Boston to Beijing on Hainan Airlines and non-stop flights to Panama City via Copa Airlines. Boston is an international hub for business, which strengthens the state’s economy.

...with the City of Boston

Roundtable Chair and Region President for Verizon New England Donna Cupelo was tapped by Boston’s newly elected Mayor Marty Walsh to serve as co-leader of the transition team’s economic development committee. The team worked to promote job creation for residents of all Boston’s neighborhoods and help businesses thrive throughout the city.

“The Roundtable’s collaborative approach and the frank exchange of ideas with its members are helping the Department of Revenue as we continue to expedite dispute resolution, enhance communications with the business community and improve our customer service.”

Amy Pitter, Commissioner, Department of Revenue
....with the Legislature

In addition to the Roundtable’s collaboration with legislative leaders on transportation, tax policy, STEM and health care, MBR urged action on a range of policy issues.

- MBR Executive Director JD Chesloff urged the Joint Committee on Telecommunications, Utilities and Energy to support “An Act Upgrading Mobile Broadband Coverage in the Commonwealth,” which would expedite the permitting process to help bring broadband services to more people across the state.

- The Roundtable supported “An Act Modernizing Telephone Regulation and Encouraging Economic Growth,” before the Joint Committee on Telecommunications, Utilities and Energy. The key message of the Roundtable’s testimony focused on the need for regulation that allows for innovation.

- The Roundtable supported the work of the Joint Committee on Economic Development and Emerging Technologies on “An Act to Create and Maintain Jobs in the Commonwealth.”

- MBR joined the Greater Boston Chamber, AIM and the Taxpayers Foundation to oppose “An Act Relative to Tax Expenditure Information.” The state already publishes an annual tax credit transparency report.

The Roundtable also hosted conversations with Attorney General Martha Coakley, as well as numerous cabinet secretaries, commissioners, and appointed officials on MBR’s policy priorities and partnered with Northeastern University on the CEO Breakfast Series that featured EMC CEO Joseph Tucci and CVS CEO Larry Merlo.

“To keep our economy on a strong forward path, it takes leadership and real engagement between government and the business community. MBR builds bridges between policymakers and business leaders which is so important to keeping Massachusetts competitive in a global economy.”

Attorney General Martha Coakley
...with the media

A Boston Sunday Globe story featured the Roundtable’s health care report on the best practices of corporate wellness initiatives. The story highlighted several Roundtable members including Consigli Construction, Northmark Bank and Blue Cross Blue Shield, whose companies are successfully using wellness programs to keep employees healthier and reduce costs. MBR also appeared often in social and traditional media including Boston Business Journal and Education Week and commented frequently in other publications with members and stakeholders.

MBR’s JD Chesloff and Universal Technical Institute’s Chuck Barresi joined co-anchor of NECN Business Mike Nikitas to promote STEM education in Massachusetts.

...with the BRT

MBR works closely with the national Business Roundtable (BRT) on important policy and competitiveness issues. The BRT issued its 2013 sustainability report featuring “narratives from 147 CEOs on how their companies are improving the quality of life for all Americans and for tens of millions of people around the world through their sustainability efforts.”

MBR is proud to share 15 companies that are members of both organizations and showcased throughout the year what our shared members are doing to protect our environment, improve education and enhance the quality of life for people all over the world.
...with partners on talent

Workforce Development Summit
Roundtable members Steve Vinter, Google, Marcy Reed, National Grid, Ranch Kimball, Babson and Marty Jones, MassDevelopment led discussions with more than 250 public and private leaders from industry, government and education at the 4th Annual Jobs & Workforce Summit. House Speaker Robert DeLeo touted the state’s strong fiscal management, talented workforce and world-class educational institutions as key drivers of economic growth. Labor & Workforce Development Secretary Joanne Goldstein, Worcester Chamber President Tim Murray, State Senator Jamie Eldridge and other local leaders participated in the summit supported by Verizon, State Street, MassDevelopment, TJX and Eastern Bank.

“As our Commonwealth and the country confront a recovering, reinvented economy, STEM education has never been more essential. From preparing our students for the jobs of tomorrow to retraining workers who are looking for a new path forward, the Roundtable is leading the way in ensuring Massachusetts remains competitive in the global innovation economy.”

Congressman Joseph Kennedy III

STEM Summit
The Roundtable co-hosted and sponsored the 10th Annual STEM Summit, which drew a record crowd of more than 1,200 industry leaders, educational officials, teachers, policy makers and students at Gillette Stadium. Congressman Joseph Kennedy, Chair of the Governor’s STEM Advisory Council unveiled the state’s newly updated STEM Plan 2.0, which will guide the next phase of the state’s nationally-renowned commitment to STEM education. Governor Deval Patrick led a standing ovation for the Massachusetts STEM Teacher of the Year, Kelly Powers, a computer science teacher at the Advanced Math and Science Academy in Marlborough. The award was created through a partnership between the New England Patriots and Raytheon. Roundtable members sponsored and supported the Summit including EMC, National Grid, Verizon, UMass, Comcast, iRobot, Raytheon, IBM, Partners Healthcare, Mass. Technology Collaborative, Siemens, MITRE and the Museum of Science.
The Roundtable's 2013 Annual Meeting was hosted at the TD Garden by longtime member Charlie Jacobs, Principal, Delaware North Companies and the Boston Bruins. The meeting featured “A Conversation with Jeremy Jacobs,” Chairman of Delaware North Companies and Owner of the Bruins. It also included a discussion of federal policy challenges with Bill Miller from the national Business Roundtable. Immediately after the meeting, members enjoyed a special behind-the-scenes guided tour of the TD Garden and The New England Sports Club.

“Our experience has shown that it is the remarkable skill and dedication of the people in Massachusetts that make this a great place to do business.”

Charlie Jacobs, Principal, Delaware North Companies & Boston Bruins

@MABizRoundtable
The Roundtable successfully launched its new Twitter account engaging with MBR members, policy makers and key partners to share news and ideas instantly from the business community.
**Roundtable Task Forces**

**Transportation & Infrastructure**

**Jay Doherty**  
**Cabot, Cabot & Forbes, Chief Executive Officer**

MBR’s Transportation & Infrastructure Task Force engaged with MassDOT Secretary Richard Davey and worked in partnership with stakeholders in the business community, transportation advocates, non-profit organizations and others to share MBR’s principles for a long-term, sustainable transportation solution for the state. Many of the principles developed by Roundtable members for a more efficient and effective transportation system were embedded in MassDOT’s “Way Forward” transportation plan. The Roundtable and the Massachusetts Taxpayers Foundation published a timely report that advanced the public discourse on transportation and highlighted both the progress at MassDOT and the need for continued reforms. Working with Task Force Chair Jay Doherty, MBR met with leaders from the Legislature and the Administration to advocate for the principles adopted by Roundtable members. MBR convened members and Secretary Davey and MBTA General Manager Beverly Scott to examine progress on reforms and plans for investments in the transportation system.

“When we think about the future of education and our workforce, it’s about life sciences, it’s about STEM. The Massachusetts Business Roundtable is helping us highlight the importance of the state’s STEM agenda—helping us expose students to STEM education to prepare them for the jobs of the 21st century.”

Matthew Malone, Secretary of Education

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**Education & Workforce Development**

**Marcy Reed**  
**National Grid Massachusetts, President**

The Roundtable’s Education Task Force Chaired by Marcy Reed convened a discussion with Secretary of Education Matt Malone and business leaders at iRobot’s headquarters in Bedford and began to develop a shared set of principles for the business community’s advocacy in 2013. Members worked with Google Director Steve Vinter on the importance of expanding computer science opportunities for students in Massachusetts, as well as with Speaker DeLeo and the Department of Higher Education on the new STEM Academy, a partnership with community colleges to train students interested in STEM careers. The Task Force convened a discussion with UMass President Robert Caret about higher education, STEM and the role of the UMass system in stimulating economic activity across the Commonwealth. The Task Force also reviewed the results from an employer survey on education reform conducted by the MassINC Polling Group for the Massachusetts Business Alliance for Education, Associated Industries of Massachusetts and the Roundtable, which revealed employer attitudes and ideas about the goals of our educational system and the need for continued reforms. The findings will help inform the Roundtable’s advocacy on education in 2014.
Competitiveness

Barry Nearhos
PricewaterhouseCoopers, Managing Partner

Chairman Barry Nearhos convened the Roundtable’s Competitiveness Task Force to address revenue and transportation proposals under consideration in the Legislature. Members expressed concerns about the impact some of the proposed taxes could have on the state’s competitiveness, as well as the uncertainty around the revenue language and its implementation. Members played a key role identifying the challenges associated with the proposed tax on computer software services, which formed the basis of the Roundtable’s advocacy throughout the year toward its repeal working with lawmakers, administration officials and the other business groups. MBR’s Competitiveness Task Force included leaders from companies including Raytheon, EMC, Verizon, John Hancock, Comcast, Citizens Bank, Northeast Utilities, Cabot Corporation, Shawmut Design & Construction, Steward Healthcare, Harvard Pilgrim, Ernst & Young, Deloitte, Mintz Levin, Weil Gotshal, Korn/Ferry International, Cohen Kinne Cook Valicenti, Wilmer Hale and PwC.

Investment Committee

Irina Simmons
EMC Corporation, Senior Vice President & Chief Risk Officer

Roundtable Treasurer and Chair of the newly formed Investment Committee Irina Simmons joined MBR members Jeff Cook, Jerry Sargent and Bud LaCava to address the use of MBR’s surplus and to establish an investment policy guiding the amount maintained in MBR’s reserve fund. The Committee also oversaw a review of MBR’s information systems needs, which led to necessary investments in systems upgrades, cyber security enhancements and a new server. The Committee reported back to the full Roundtable Board of Directors on these upgrades and noted that the annual audit had produced no findings and no management letter. Treasurer Simmons conducted quarterly reviews of the Roundtable’s finances, systems and operating budget.

Membership & Nominations Committee

Robert Sullivan
Korn/Ferry International, Managing Director

Led by Chairman Robert Sullivan, the Roundtable added new members in 2013 including Colin Angle, iRobot; James Clemmer, Covidien; James O’Leary, Alternate Concepts, Inc.; Carlo Zaffanella, General Dynamics; and, Steven Bradley, Baystate Health. MBR also welcome three members toward the end of the calendar year—Steve Vinter, Google; Christopher MacKenzie, McGladrey; and, David McCabe, Eaton Vance Investment Counsel. MBR’s Annual Meeting in June 2013 hosted by longtime Roundtable member Charlie Jacobs, Principal, Delaware North Companies and the Boston Bruins, featured A Conversation with Jeremy Jacobs, Chairman of Delaware North Companies and Owner of the Bruins. Mr. Sullivan served as moderator for the discussion with Chairman Jacobs and Roundtable members.
Public Policy Priorities for 2014

The MBR Board of Directors approved the following public policy priorities:

I. Cost Competitiveness
   - Health Care Reform Law Implementation
   - Fiscal Policy

II. Public Investment Strategy
   - Workforce Development/STEM
   - Transportation
   - Housing

Within those categories, MBR will focus on the following in 2014:

Health Care Reform MBR’s Health Care Task Force developed a “Framework for Cost Containment,” a set of principles that guided our involvement in the creation of the state’s cost containment legislation, Chapter 224 of the Acts of 2012. With that law now being implemented, the Health Care Task Force will develop a new set of principles to inform our advocacy around the implementation of that law that builds upon the framework established in 2011.

2014 DELIVERABLE: Develop and disseminate “Principles for the Implementation of Payment Reform” document.

Fiscal Policy The 2014 legislative session, as well as initiative petitions that appear headed to the 2014 ballot, include many issues of importance to MBR and the state’s business climate, including: an increase in the minimum wage; earned sick leave; unemployment insurance reform; nurse staffing ratios; and the elimination of indexing the gasoline tax to inflation. The Tax Fairness Commission also will issue its final report. All of these could impact MBR’s membership and the state’s business climate. MBR, through the Competitiveness Task Force, will continue to gather information from the membership to further define and update our positions on these issues, as well as develop the framework for a state economic development strategy that will drive our advocacy as well as inform candidates for public office.

2014 DELIVERABLE: Develop framework for economic competitiveness and update MBR’s Competitiveness Agenda.

Workforce Development/STEM MBR’s Education and Workforce Development Task Force identified a series of priorities for 2014 including continued leadership on the state’s STEM agenda, implementation of the new statewide STEM Plan and codification of the STEM initiative. MBR will participate in MassCAN, an initiative to expose all students in Massachusetts to computer science; develop a shared education agenda within the business community; continue to push for a coordinated, collaborative workforce development system that is aligned with the needs of industry; and, promote early childhood education with a focus on its link with STEM.

2014 DELIVERABLE: Codify the state’s STEM agenda; incorporate computer science more intentionally in the state STEM agenda; complete survey of business leaders and develop a shared set of education policy priorities for the business community; continue advocacy for early childhood education and aligning the education and workforce development systems with industry needs through participation in a variety of appointed positions.

Interconnected Investment Growth Strategy MBR’s Board of Directors identified the relationship between transportation, housing, and workforce policy as an area for additional review. MBR will bring the lens of the interconnectedness of these policy areas to our advocacy for pro-growth public policy. We have engaged with a team of researchers from the UMass Boston, who are conducting in-depth interviews with Roundtable members, public officials and other stakeholders to explore this issue further and issue a report.

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Jones, Marty
President & CEO
MassDevelopment

Judge, James J. *
Executive Vice President & CFO
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Kennedy, William F.
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Nutter, McClennen & Fish

NEW MEMBER
Angle, Colin
Chairman of the Board, CEO and Co-Founder
iRobot Corporation

NEW MEMBER
Bradley, Steven F.
Vice President
Baystate Health

NEW MEMBER
Clemmer, James C.
President, Medical Supplies
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NEW MEMBER
Goemaat, Thomas E.
Chief Executive Officer
Shawmut Design & Construction

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NEW MEMBER  
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Walsh, Jane C.*  
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Northmark Bank

NEW MEMBER  
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Vice President  
John Hancock Financial Services

Wroe, Jr., Thomas  
Chairman & CEO  
Sensata Technologies

NEW MEMBER  
Carlo Zaffanella  
Vice President, Open Combat Systems  
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