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BIOGRAPHY AND TIMELINE

BRIEF OVERVIEW

Full Name:	Willard Mitt Romney
Born:	March 12, 1947, Detroit, Michigan
Family:	Wife Ann (married 37 years); five sons, ten grandchildren
Residences:	171 Marsh Street Belmont, MA 02478 2005 assessed value: \$3.162 million 87 Claflin Road Wolfeboro, NH 03894 2006 estimated value: \$5 million <i>The Boston Herald</i> noted Romney's "\$5 million Lake Winnepesaukee estate ... features a three-story, six-bedroom, 3-bathroom house, a sprawling \$200,000 stone boathouse and a recently renovated \$500,000 carriage house with guest quarters."¹ Vacation home Deer Valley, UT 2006 estimated value: \$5.2 million²
Education:	The Cranbrook School, Bloomfield Hills, MI (1965) Stanford University (1965-66, departed for 30-month mission after freshman year) B.A., Brigham Young University (1971) M.B.A., Harvard Business School; J.D., Harvard Law School (1975)
Employment:	Consultant, Boston Consulting Group (1975-77) Consultant, Bain & Company, Inc. (1977) Vice President, Bain & Company, Inc. (1978-84) Co-founder and managing general partner, Bain Capital, Inc. (1984-99) Interim CEO, Bain & Company, Inc. (1991-93) President and CEO, Salt Lake Organizing Committee (1999-2002)
Political Career:	Republican nominee for U.S. Senate from Massachusetts (1994) Governor of Massachusetts (2003-07) Chairman, Republican Governors Association (2005-06)

BIOGRAPHICAL TIMELINE

March 12, 1947	Romney is born in Detroit, MI, youngest of four children of future Michigan Gov. George Romney and his wife Lenore.
Spring 1965	Graduates from the Cranbrook School, an exclusive, all-male prep school in Bloomfield Hills, MI.
August 1965	Enrolls at Stanford University, where he spends only one year.
June 1966	Departs for France on a Mormon mission that will last 2½ years.

¹ *The Boston Herald*, 7/29/05

² *Deseret Morning News*, 12/24/06

June 1968	While in France, Romney is injured in a serious car accident (caused by a drunk driver) that kills the wife of his mission's leader; for a time, Romney's family is under the impression he has been killed.
December 1968	Returns to the United States from his mission in France.
March 21, 1969	Marries Ann Davies, his girlfriend of four years.
1969	Transfers to Brigham Young University in Provo, UT, enrolling as a sophomore.
1970	After four years of deferments through student and missionary status, Romney draws high draft number and avoids conscription and service in Vietnam.
Spring 1971	Graduates as valedictorian with highest honors from Brigham Young University.
Fall 1971	Enrolls at Harvard Law School.
1972	Enters joint program at Harvard that combines law and business degrees in one program.
Spring 1975	Graduates with joint M.B.A./J.D. from Harvard Business School and Harvard Law School; was Baker Scholar at business school and earned <i>cum laude</i> honors from law school.
Summer 1975	Joins Boston Consulting Group as a consultant after graduating from Harvard.
1977	Joins Bain & Company, Inc. as a consultant.
1978	Promoted to vice president at Bain & Co.
1984	Bain & Co. founder Bill Bain asks Romney to head a new private equity spin-off unit called Bain Capital, Inc.; serves as managing general partner at Bain Capital until 1999.
October 29, 1990	Bain & Co. announces Romney will take over as "worldwide managing director" in the near future; Bill Bain asks Romney to return on an interim basis to engineer turnaround of the flagging company.
January 1991	Takes over as interim CEO at Bain & Co., serving a two-year stretch and rescuing the company from a dire financial situation; continues to serve as managing general partner at Bain Capital.
October 1993	Switches party affiliation from Independent to Republican in anticipation of running for political office in 1994.
November 1993	Informs GOP activists he is likely to run for the U.S. Senate.
February 2, 1994	Formally declares his candidacy for the U.S. Senate.
September 20, 1994	Wins Republican U.S. Senate primary over businessman John Lakian by an 82-18% margin.
November 8, 1994	Loses U.S. Senate race to Sen. Ted Kennedy (D) by a 58-41% margin.
1995	Flirts with idea of running against Sen. John Kerry in the 1996 Senate race, but ultimately foregoes another run and backs then-Gov. Bill Weld (R).
Spring 1995	Co-chairs "The Task Force on Emerging Companies," a 13-member business panel formed by the Weld Administration and charged with recommending ways to foster growth of new companies.
July 26, 1995	George Romney, Mitt's father, dies in Michigan at age 88.

September 12, 1995	Attends White House event and is praised by President Clinton for supporting the beleaguered AmeriCorps program, which was under assault from congressional Republicans.
1996	Bain Capital acquires 11 firms in various transactions throughout the year; Romney earns an estimated \$22 million, according to <i>FinancialWorld</i> magazine.
November 13, 1996	After poor Republican showings in the 1996 election, the <i>Boston Herald</i> calls on Romney to step forward and become state GOP chairman.
November 14, 1996	Bain Capital and a partner firm complete sale of Experian to a British company, turning a \$200 million profit for Bain in less than three months.
1997	Bain Capital acquires at least 17 firms throughout the year, according to <i>Boston Globe</i> reporting.
April 16, 1997	Bain Capital pledges \$1 million through various charities to help Boston's youth.
April 27, 1997	Attends the "Presidents' Summit for America's Future," a Clinton Administration initiative to promote volunteerism initially spearheaded by George Romney just before his death.
July 7, 1998	Lenore Romney, Mitt's mother, dies at age 89.
December 1998	Ann Romney diagnosed with multiple sclerosis.
February 11, 1999	Hired as president and CEO of Salt Lake Organizing Committee, tasked with running the business side of the 2002 Olympic Winter Games; ultimately erases organization's \$379 million deficit and turns a profit.
April 9, 2000	Confirms he is considering a run for governor in Massachusetts following the 2002 Winter Olympics.
Summer 2000	Ann Romney's multiple sclerosis goes into remission.
August 21, 2001	While professing interest in another run for office, Romney declares he will not challenge any GOP incumbent in Massachusetts in 2002, saying he would back acting Gov. Jane Swift (R) if she decided to run.
February 24, 2002	Winter Olympics concludes.
March 19, 2002	Hours after Gov. Swift announces she will not seek a full term in 2002, Romney declares his intention to run for governor of Massachusetts.
April 24, 2002	Steps down as head of the Salt Lake Organizing Committee.
September 17, 2002	Wins Republican nomination for governor.
November 5, 2002	Elected governor of Massachusetts by a 50-45% margin over state Treasurer Shannon O'Brien (D).
January 2, 2003	Sworn in as 70th governor of Massachusetts.
November 18, 2003	Massachusetts Supreme Judicial Court rules same-sex marriage is protected in the Massachusetts Constitution.
May 17, 2004	Same-sex marriages begin in Massachusetts.
August 2004	Publishes "Turnaround: Crisis, Leadership and the Olympic Games," a book recounting his time at the Salt Lake Organizing Committee.

June 21, 2005	Acknowledges publicly he is considering a run for president in 2008; insists he still plans on seeking reelection as governor but promises decision in the fall.
December 1, 2005	Elected chairman of the Republican Governors Association.
December 14, 2005	Announces he will not seek re-election as governor in 2006.
April 12, 2006	Signs into law a comprehensive health care reform package designed to provide insurance for all Massachusetts residents by mid-2007.
July 10, 2006	A ceiling collapse in Boston's I-90 connector tunnel kills one woman and sparks a series of events affecting the entire "Big Dig" project; Romney takes large investigative role and earns much media attention throughout.
December 1, 2006	<i>Boston Globe</i> reports Romney has used illegal immigrants to perform maintenance work at his home.
January 3, 2007	Announces he will form a presidential exploratory committee, files papers with the FEC.
January 4, 2007	Leaves office as his gubernatorial term ends.

TOP HITS

SOCIAL ISSUES

Abortion

- Romney says he changed his mind on abortion meeting with Harvard stem cell researcher – Romney claims the doctor said scientists “kill” embryos after 14 days, but doctor later said Romney “mischaracterized my position.”
- Months after his “conversion,” Romney stated his commitment to upholding Massachusetts’ abortion laws and appointed pro-choice judge to state district court.
- In October 2005, Romney signed bill expanding family planning services, including abortion counseling and morning-after pill.
- In December 2005, Romney “abruptly ordered his administration to reverse course ... and require Catholic hospitals to provide emergency contraception medication to rape victims.”
- Romney health insurance plan expanded access to abortion, required Planned Parenthood representative on state panel.
- Romney endorsed legalization of abortion pill RU-486 access during his 1994 Senate race and backed federal funding of abortion, saying “I think it’s important that people see me not as a pro-life candidate.”
- In 1994 and 2002, Romney confirmed his support for Roe v. Wade decision and forcefully positioned himself as pro-choice in 1994 Senate race, saying “you will not see me wavering on that.”
- Romney has refused to comment on bill pending in South Carolina legislature requiring that abortion doctors offer pregnant women option of viewing ultrasound.

Gay Rights

- Romney endorsed Rep. Barney Frank’s Employment Nondiscrimination Act in 1994.
- In 1994, Romney called “don’t ask, don’t tell” policy first step toward having gays and lesbians “able to serve openly and honestly in our nation’s military” and said he would provide “more effective leadership” on gay rights issues than Ted Kennedy.
- In 2003, *The Washington Times* reported Romney “would support a Vermont-style civil union law in Massachusetts.”
- As governor, Romney said health coverage benefits and hospital visitation rights should be provided to gay couples.
- Romney promised to make gay partnership benefits a “hallmark of my leadership as governor” and has said he would attend gay weddings if invited.
- Romney publicly opposed Boy Scouts’ ban on homosexuals in 1994 and 2002 campaigns.
- In 2002, Romney backed hate crimes legislation that included sexual orientation provisions.
- In 2007, Romney praised gay parent who confronted him over gay marriage issue, but in 2005 remarked to South Carolina audience that some gay couples “are actually having children” and called it “wrong.”

Gun Control

- In 1994 Senate race, Romney backed Brady bill and assault weapons ban, saying “I don’t line up with the NRA” and “that’s not going to make me the hero of the NRA.”
- Romney called Clinton crime bill “a big step forward.”
- As governor, Romney quadrupled gun licensing fees and vowed not to “chip away” at tough gun laws
- In 2004, Romney signed permanent state-level ban on assault weapons that was mirrored after federal assault weapons ban.
- In January 2006, Romney said he owned a gun – then two days later admitted he did not and the gun belonged to his son.
- Romney bragged about being member of the NRA but later revealed he didn’t join until August 2006, just before launching his presidential campaign.
- Romney recently said he’s “been a hunter pretty much all my life” but later admitted he hunted only twice in his life, later clarifying remarks by claiming he has hunted “small varmints ... more than two times.”
- In 2006 press conference, Romney claimed he had been hunting “many times” after returning from quail hunt in Georgia.

ECONOMIC ISSUES

- State spending increased at well over rate of inflation under Romney’s watch, estimated at 24% - more than \$5 billion – over Romney’s final three years.
- Under Romney, Massachusetts dramatically underperformed the rest of the nation in terms of job growth.
- Romney has been criticized by experts for failing to deliver on issues of business development and economic growth after selling himself as the “CEO governor.”
- 2006 report issued by quasi-public Massachusetts Technology Collaborative warned the state was losing its grip as leader in “innovation economy” and that tech job was alarmingly slow.
- Romney left his successor to fill a budget deficit exceeding \$1 billion.
- Romney raised state fees and taxes more than \$700 million per year, according to independent experts.
- Romney raised fees by roughly \$500 million in his first year alone, a figure that was highest in the nation.
- Romney quadrupled gun licensing fees and raised fees on first responders, real estate transactions, the blind, golfers and many others.
- Massachusetts’ state and local tax burden rose more than 7% during Romney’s administration.
- Romney refused to endorse the Bush tax cuts in 2003, telling the state’s all-Democrat congressional delegation he wouldn’t be a cheerleader for the plan.
- Romney implemented three rounds of tax changes (which he referred to as “closing loopholes”) which increased business taxes by an estimated \$400 million per year.
- Massachusetts’ corporate tax climate now ranks 47th in the nation, according to the Tax Foundation.
- Romney proposed – then backed away from – a new internet tourism tax that would levy higher taxes on users of sites like Orbitz and Travelocity.
- Romney enrolled Massachusetts in multistate compact aiming to end moratorium on internet sales taxes.

- Romney took no position on estate tax issue in 2002 and signed 50% increase in state cremation fee, which observers called “hidden tax on the dead.”

FOREIGN POLICY

- Romney has no foreign policy experience.
- Though generally described as a supporter of the president’s policy in Iraq, Romney came under fire in April 2007 for advocating “secret” withdrawal timetable similar to proposal by Sen. Mark Pryor (D-AR).
- In June 2007, Romney stepped up his criticism of the Bush Administration’s Iraq policy by publicly denouncing the White House’s comparison of future troop presence in Iraq to our current presence in South Korea.
- Romney hedged on endorsing troop surge and has been criticized for not talking enough about Iraq.
- During June 2006 presidential debate, Romney incorrectly claimed weapons inspectors were not allowed to enter Iraq before the 2003 U.S. invasion.
- When Romney finally endorsed the president’s troop surge proposal, he unintentionally endorsed larger surge than was proposed by calling for extra regiment in Anbar province.
- Romney said capturing Osama bin Laden would result in “very insignificant increase in safety” for America and such effort was “not worth moving heaven and earth and spending billions of dollars” to catch one person.
- After calling for economic divestment from Iran, Romney was embarrassed by revelation that the Italian branch of Bain & Company – firm where Romney started as young consultant and served as CEO in early ‘90s – received \$2.3 million contract from National Iranian Oil Company in 2004.
- Bain Capital, the private equity firm that made Romney his fortune, currently owns a chemicals and paint company called SigmaKalon that operates an office in Tehran.
- Romney has made favorable comments about plan offered by Sen. Joe Biden (D-DE) to split Iraq into thirds.
- Romney has proposed doubling the size of the Guantanamo Bay detention facility and supports “enhanced interrogation techniques.”
- Romney called Cuban president Fidel Castro a “monster” and has taken hard line against the dictator, but mistakenly employed signature Castro slogan while speaking to largely Hispanic audience in Miami this year.
- Romney praised 2005 plan by Citgo Petroleum Corp. – ultimately controlled by the Venezuelan government and President Hugo Chavez – to provide low-income Massachusetts residents with discounted heating oil.

DOMESTIC POLICY

Campaign Finance Reform

- In 2002, Romney proposed installing 10 percent tax on private donations to political campaigns.
- Romney praised McCain at campaign rally shortly before 2002 election, saying he shared McCain’s “values”
- Romney once proposed capping spending on elections, abolishing PACs and “tightening regulations.”
- *National Review*’s Ramesh Ponnuru said Romney once held campaign finance positions “to the left of McCain-Feingold.”

Immigration

- In November 2005, Romney said McCain immigration plan was “quite different” from amnesty and called plan “reasonable.”
- Romney in 2005: “I think an amnesty program is what – which is all the illegal immigrants who are here are now citizens, and walk up and get your citizenship. What the president has proposed, and what Senator McCain and Cornyn have proposed, are quite different than that.”
- In March 2006, Romney supported “path toward citizenship” for illegal immigrants.
- Romney in 2006: “Those that are here paying taxes and not taking government benefits should begin a process towards application for citizenship.”
- Romney in 2006: “The 11 million or so that are here are not going to be rounded up and box-carted out of America.”
- Romney’s current immigration stance is at odds with top FL Republicans like Jeb Bush, Charlie Crist and Mel Martinez as he places emphasis on Florida in quest for GOP nomination.
- Romney mischaracterized former Gov. Jeb Bush’s immigration position, comparing his own initiative to let state police arrest illegal immigrants to a more limited, terrorism-focused program initiated by Bush in wake of 9/11 attacks.
- Romney has failed to clearly articulate any plan for dealing with the estimated 12 million illegal immigrants in the U.S.
- For more than a decade, Romney used services of company heavily reliant on illegal immigrant labor to perform landscaping duties at his home.
- While Romney was governor, state of Massachusetts approved government contract for New Bedford firm raided in early 2007 for massive immigration law violations.

Environment and Energy

- In 2003, Romney said, “I think the global warming debate is now pretty much over.”
- As governor, Romney was open to “regional cap and trade” system to address global warming – saying “now is the time to take action” – but later pulled Massachusetts out of regional agreement on same day he announced he would not seek reelection.
- In 2004, a Romney press event announcing new state policy to combat global warming was marred by his refusal to admit global warming is actually happening.
- As candidate for governor, Romney proposed increasing excise taxes on vehicles with high gas mileage – otherwise known as an “SUV tax.”
- Romney has been open to raising the federal gas tax in the past and has not ruled it out in the future.
- In 2007 television appearance, Romney refused to rule out a carbon tax or carbon caps if elected president.
- Romney teamed with Sen. Ted Kennedy to oppose renewable energy project on Cape Cod known as “Cape Wind.”

Health Care

- Romney changed positions on importing cheaper prescription drugs from Canada – first supporting it, now opposing it.
- Romney called rate of growth of prescription drug costs “outrageous” and said Medicare drug benefit passed in 2003 was too expensive and criticized the Bush Administration for failing to enact broader reforms.

- Romney's health insurance reform plan has been assailed by conservative health care experts as "a gourmet recipe for runaway spending" and praised by Ted Kennedy, Hillary Clinton and John Kerry.
- Romney once called his state's health insurance law a "once in a generation" achievement.
- *Wall Street Journal* said Romney oversold virtues of healthcare plan, imposed government mandate and now distances himself from own policy.
- Plan is encountering higher costs and more bureaucracy than Romney promised, as officials warn costs must be controlled or the program will be unsustainable.
- Plan will cost millions more than anticipated while exempting 20% of uninsured from coverage mandate.
- Romney health plan expanded access to abortion, required Planned Parenthood representative on state policy panel.

BUSINESS RECORD

- Romney spent most of his business career as CEO of private equity firm Bain Capital – as of June 2007 he maintained an investor's stake in the company.
- Bain Capital has been criticized for relentless focus on bottom line at expense of workers and jobs.
- Romney describes himself as a "business legend" in his campaign ads and once said of himself: "I'm basically in the investor's Hall of Fame."
- Bain Capital and Bain & Co. employees donated at least \$171,000 to Romney's presidential campaign in Q1 2007 and gave tens of thousands more in support of his previous political activities.
- Bain Capital financed 1988 buyout with junk bonds issued by Drexel Burnham – when SEC filed charges against the firm and CEO Michael Milken, Bain Capital maintained their business relationship; Romney later reminisced about "the glorious days of Drexel Burnham."
- In 2004, Bain & Co. received a multi-million dollar contract from the National Iranian Oil Company.
- Romney sat on board of directors of Bain portfolio company Damon Clinical Laboratories, which in 1996 was fined over \$100 million for Medicare fraud committed during Romney's tenure.
- Bain Capital owned company named Ampad that purchased an Indiana paper plant, fired its workers and offered to bring them back at drastically reduced salary and benefits – the firings became an issue in the 1994 Senate race when workers blamed Romney for their situation and appeared in Kennedy campaign ads.
- After Romney became governor, Bain Capital teamed up with Chinese appliance maker Haier Group in 2005 in effort to purchase Newton, IA-based Maytag Corp. and send jobs overseas.
- At least two Bain Capital companies – Stream International and Modus Media – focused on outsourced technical support services, expanding facilities abroad while contracting operations in the United States.
- Bain Capital operated steel company called GS Industries which went bankrupt in 2001 after years of labor strife, closing a plant in Kansas City and laying off over 700 workers.

POLITICAL ISSUES

- In late 2002, Romney described himself as "a progressive-on-social-issues governor of Massachusetts."
- Romney left the state GOP weaker than when he took over as governor, with the party described as being "at its weakest point in years."

- During 1998 panel on urban issues, Romney addressed need for Boston business communities to work together and claimed “Hillary Clinton is very much right, it does take a village.”
- In 1994, Romney opposed the Contract with America without even reading it.
- Romney has made political contributions to Democratic candidates, saying he places friendship above politics.
- Romney appeared in 2003 TV ad endorsing Democrat Rocky Anderson – who has been outspoken in calling for President Bush’s impeachment over Iraq war – for reelection as Salt Lake City mayor; Romney featured an Anderson testimonial in his own TV ads while running for governor in 2002.
- Romney proclaimed he wasn’t a Republican during the Reagan years, saying “I was an independent during the time of Reagan-Bush. I’m not trying to return to Reagan-Bush.”
- Romney was an independent until deciding to run for the Senate in 1994.
- Romney voted for Paul Tsongas in the 1992 Democratic presidential primary.
- Romney has surrounded himself with policy advisers – like Gregory Mankiw, Vin Weber, Kerry Healey, Bill Weld and more – who do not share his beliefs on key issues.
- Top Romney campaign aides and surrogates have ties to several recent Washington ethics scandals.
- Romney’s spending decisions as chairman of the Republican Governors Association during 2006 election cycle “raised eyebrows” in light of his presidential aspirations.

SOCIAL ISSUES

EXECUTIVE SUMMARY

Abortion

- Romney says he changed his mind on abortion meeting with Harvard stem cell researcher – Romney claims the doctor said scientists “kill” embryos after 14 days, but doctor later said Romney “mischaracterized my position.”
- Months after his “conversion,” Romney stated his commitment to upholding Massachusetts’ abortion laws and appointed pro-choice judge to state district court.
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- Romney has refused to comment on bill pending in South Carolina legislature requiring that abortion doctors offer pregnant women option of viewing ultrasound.

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- Romney recently said he’s “been a hunter pretty much all my life” but later admitted he hunted only twice in his life, later clarifying remarks by claiming he has hunted “small varmints ... more than two times.”
- In 2006 press conference, Romney claimed he had been hunting “many times” after returning from quail hunt in Georgia.

ABORTION

During His Political Career, Romney Has Been Pro-Choice, Then Not Pro-Choice, Then Pro-Choice Again, Now Claims To Be Pro-Life

Romney Forcefully Positioned Himself As Pro-Choice In 1994 Senate Race, Saying “You Will Not See Me Wavering On That.” “When Kennedy called him ‘multiple choice,’ Romney demanded an extra rebuttal. He revealed that a close relative died of an illegal abortion years ago and said, ‘Since that time, my mother and my family have been committed to the belief that we can believe as we want, but we will not force our beliefs on others on that matter, and you will not see me wavering on that.’” (Joan Vennochi, “Romney’s Revolving World,” *The Boston Globe*, 3/2/06)

- **In 1994, Romney Claimed He Supported Legalizing Abortion Before Roe v. Wade Decision.** ROMNEY: “I joined my mother in 1970 when she said she was in favor of legalizing abortion.” (Scot Lehigh, “Romney Labeled A ‘Pretender’ On Abortion Rights,” *The Boston Globe*, 10/12/94)
-  **Romney, During 1994 Debate:** “I believe that abortion should be safe and legal in this country. I have since the time that my mom took that position when she ran in 1970 as a US Senate candidate. I believe that since Roe v. Wade has been the law for 20 years we should sustain and support it.” (Joan Vennochi, “Romney’s Revolving World,” *The Boston Globe*, 3/2/06)

As Romney Considered Run For Office In Utah In 2002, He Told Local Paper He Did Not “Wish To Be Labeled Pro-Choice.” “After Romney lost the Senate race, he decamped to Utah to run the Winter Olympics. When it was rumored he might seek political office there, he wrote this in a letter to the editor of the Salt Lake City Tribune: ‘I do not wish to be labeled prochoice.’” (Joan Vennochi, “Romney’s Revolving World,” *The Boston Globe*, 3/2/06)

- **Romney:** “When I am asked if I am pro-choice or pro-life, I say I refuse to accept either label.” (Glen Warchol, “This Is The Place, But Politics May Lead Romneys Elsewhere,” *The Salt Lake Tribune*, 2/14/99)

Announcing For Massachusetts Governor In 2002, Romney Reaffirmed His Pro-Choice Position. “[A]s Governor of the Commonwealth, I will protect the right of a woman to choose under the law of the country and the laws of the Commonwealth.” (Joan Vennochi, “Romney’s Revolving World,” *The Boston Globe*, 3/2/06)

-  **Romney:** “I will preserve and protect a woman’s right to choose, and am devoted and dedicated to honoring my word in that regard. I will not change any provisions of Massachusetts’ pro-choice laws.” (2002 Romney-O’Brien Gubernatorial Debate, Suffolk University, Boston, MA, 10/29/02)

- **“Romney ... Said He Was Pro-Choice When He Ran For Governor Of Massachusetts.”** (Michael Goot, “Romney On Campaign Trail,” *Foster's Daily Democrat*, 4/27/07)

In 2002, Romney Offered His Completed NARAL Questionnaire, Filled Out With “Mostly Abortion-Rights Positions,” To The Media Even Before Returning It To NARAL. “Yesterday, Romney also aimed to head off confusion about his stance on abortion rights by answering a Mass National Abortion and Reproductive Rights Action League questionnaire with mostly abortion-rights positions. He offered the questionnaire to the press even before he returned it to MassNARAL...” (Stephanie Ebbert, “Romney Pushes Education At Campaign Stop,” *The Boston Globe*, 4/10/02)

Romney Now Insists He Has Always Been Personally Pro-Life. “I’ve always been personally pro-life. ... For me, the role of government (on that issue) was what was uncertain.” (AnnMarie Timmins, “Romney Tells Voters: Ask Away,” *Concord Monitor*, 4/4/07)

Former Adviser Mike Murphy, On Romney’s Pro-Life Position: “He’s been a pro-life Mormon faking it as a pro-choice friendly.” (John J. Miller, “Matinee Mitt,” *The National Review*, 12/14/05, www.nationalreview.com, Accessed 4/30/07)

Romney Says He Changed His Mind On Abortion After 2004 Meeting On Stem Cell Research With Harvard Doctor, Who Later Said Romney Mischaracterized Their Conversation

Romney Says He “Simply Changed His Mind” On Abortion One Day In November 2004. “On abortion, Romney says he simply changed his mind. He recalls that it happened in a single revelatory moment, during a Nov. 9, 2004, meeting with an embryonic-stem-cell researcher who said he didn’t believe therapeutic cloning presented a moral issue because the embryos were destroyed at 14 days. ‘It hit me very hard that we had so cheapened the value of human life in a Roe v. Wade environment that it was important to stand for the dignity of human life,’ Romney says.” (Karen Tumulty, “What Romney Believes,” *Time*, 5/21/07)

Romney’s “Epiphany” Came After Meeting Harvard Stem Cell Researcher – Romney Claimed The Doctor Said Scientists “Kill” Embryos After 14 Days. “Romney says he changed his mind in November 2004, when he met with a scientist from the Harvard Stem Cell Institute. Romney claimed in a June 2006 interview that the researcher had told him: ‘Look, you don’t have to think about this stem cell research as a moral issue, because we kill the embryos after 14 days.’ Romney went on to say that both he and his chief of staff had an epiphany, recognizing that embryonic stem cell research cheapened respect for human life.” (Scott Helman, “Romney’s Journey To The Right,” *The Boston Globe*, 12/17/06)

The Doctor, Harvard’s Douglas Melton, Claimed Romney “Mischaracterized My Position.” “Governor Romney has mischaracterized my position; we didn’t discuss killing or anything related to it. ... I explained my work to him, told him about my deeply held respect for life, and explained that my work focuses on improving the lives of those suffering from debilitating diseases.” (Scott Helman, “Romney’s Journey To The Right,” *The Boston Globe*, 12/17/06)

- **Spokesman For Harvard Stem Cell Institute:** “The words ‘kill’ and ‘killing’ are not in Dr. Melton’s professional vocabulary, a vocabulary used to discuss finding cures for diseases in order to save lives.” (Jennifer Rubin, “Mitt Romney’s Conversion,” *The Weekly Standard*, 2/5/07)

National Review’s Rich Lowry: Romney’s Conversion Story “Isn’t Very Compelling.” “[Romney’s] account of how he came to change his view on abortion – through the issue of stem-cell research – isn’t very compelling and he would probably be better off not talking about it at all. Fairly or not, people aren’t going to believe it.” (Rich Lowry, “The Romney Speech,” National Review’s “The Corner” Blog, <http://corner.nationalreview.com>, 1/29/07)

Romney Ran For Senate And Governor “Promising To Protect Abortion Rights, But Disavowed That View As He Began Preparations For A Presidential Run.” “Romney’s shifting positions on abortion have become a major flashpoint in the Republican presidential campaign. He ran for Senate in 1994 and governor in 2002 promising to protect abortion rights, but disavowed that view as he began preparations for a presidential run.” (Rick Klein and Jake Tapper, “Romney’s Pro-Life Conversion: Myth Or Reality?” *ABC News*, 6/14/07)

Six Months After His Abortion “Epiphany,” Romney Still Said He Was “Absolutely Committed” To Upholding Abortion Laws In Massachusetts

Romney: “When I First Ran For Office ... I Concluded, Wrongly, That I Would Support The Law As It Was In Place ... And So I Publicly Acknowledged My Error, And Joined With You To Promote The Sanctity Of Human Life.” “As you know, when I first ran for office ... I concluded, wrongly, that I would support the law as it

was in place – effectively, a pro-choice position. ... And I was wrong. And so I publicly acknowledged my error, and joined with you to promote the sanctity of human life. And you know that my words were matched with my actions.” (Mitt Romney, Remarks To Massachusetts Citizens For Life Mother’s Day Dinner, Agawam, MA, 5/10/07)

- **Romney:** “I believe every speck of human life is a divine speck that comes from God and as a result of that, that forms a great deal of my sense of responsibility to the people of this nation and the of the world.” (Fox News’ “The Big Story,” 4/3/07)

 **In May 2005, Romney Still Claimed He Was “Absolutely Committed” To Maintaining Pro-Choice Laws In Massachusetts.** ROMNEY: “I am absolutely committed to my promise to maintain the status quo with regards to laws relating to abortion and choice and so far I’ve been able to successfully do that and my personal philosophical views about this issue is not something that I think would do anything other than distract from what I think is a more critical agenda ...” (Mitt Romney, Press Conference, 5/27/05)

Republican Strategist Keith Appell Said Romney Airing Pro-Choice Views After Abortion “Epiphany” Begs Question: “How Many Epiphanies Have You Had?” “If he was still taking actions that appear to reflect his old, ‘pro-choice’ views after November 2004, it raises an important question for Republicans, Appell said. ‘It’s part of Romney’s challenge: How many epiphanies have you had?’ he said.” (Rick Klein and Jake Tapper, “Romney’s Pro-Life Conversion: Myth Or Reality?” [ABC News](#), 6/14/07)

Before His Recent Conversion, Romney Had Long Pro-Choice Public Record

March 2005: Romney Considered Abortion-Rights Supporter By Pro-Life Groups – Aide Claimed His Position Had Not Changed. “Marie Sturgis, legislative director of Massachusetts Citizens for Life, said she hasn’t detected any change in Romney stance. The group considers Romney to be an abortion-rights supporter, as do national antiabortion groups such as the Family Research Council. ... [Romney aide Eric] Fehrstrom said the governor’s position has not changed on either sex education or abortion.” (Scott S. Greenberger, “Roe V. Wade Omitted From Proclamation,” *The Boston Globe*, 3/25/05)

Romney In 2002 NARAL Questionnaire: “I respect and will protect a woman’s right to choose. This choice is a deeply personal one ... Women should be free to choose based on their own beliefs, not mine and not the government’s.” (Stephanie Ebbert, “Clarity Sought On Romney’s Abortion Stance,” *The Boston Globe*, 7/3/05)

- **Romney:** “[A]s Governor of the Commonwealth, I will protect the right of a woman to choose under the law of the country and the laws of the Commonwealth.” (Joan Vennoch, “Romney’s Revolving World,” *The Boston Globe*, 3/2/06)
-  **Romney:** “I do not take the position of a pro-life candidate. I’m in favor of preserving and protecting a woman’s right to choose. ... It’s an issue that’s important. I’ve established my view very clearly.” (Mitt Romney, Gubernatorial Candidates Debate, Boston, MA, 10/29/02)

“On A Questionnaire Planned Parenthood Gave To The Gubernatorial Candidates In 2002, Romney Answered ‘Yes’ To The Question, ‘Do You Support The Substance Of The Supreme Court Decision In Roe V. Wade?’” (Scott S. Greenberger, “Roe V. Wade Omitted From Proclamation,” *The Boston Globe*, 3/25/05)

In 2002, “Romney Also Professed Support For State Funding Of Abortion Services For Low-Income Women, [Planned Parenthood Spokesperson Erin] Rowland Said.” (Scott S. Greenberger, “Roe V. Wade Omitted From Proclamation,” *The Boston Globe*, 3/25/05)

- **Romney in 2002:** “This state does provide Medicaid funding for abortions, and that’s something which I would keep in place.” (“Changing Statements On The Right To Choose,” *The Boston Globe*, 3/24/02)

In 1999, Romney Said “We Have Choice. Whether You Are Pro Or Against Abortion Is Irrelevant.” ROMNEY: “We have choice. Whether you are pro or against abortion is irrelevant. The question is what is the choice. I am in favor of the women of America having the opportunity to make the right choice by providing support and care for those who want to take the child to full term and put it up for adoption. And providing information and counseling to people trying to make that decision.” (Glen Warchol, “This Is The Place, But Politics May Lead Romneys Elsewhere,” *The Salt Lake Tribune*, 2/14/99)

In 1994, Romney Claimed He Had Been Pro-Choice For Nearly 25 Years. “I believe that abortion should be safe and legal in this country. I have since the time that my mom took that position when she ran in 1970 as a US

Senate candidate. I believe that since Roe v. Wade has been the law for 20 years we should sustain and support it.” (Joan Vennochi, “Romney’s Revolving World,” *The Boston Globe*, 3/2/06)

- **Romney Campaign Accused Ted Kennedy Of Flip-Flopping On Abortion, Saying “Mitt Has Always Been Consistent In His Pro-Choice Position.”** “Citing a 1971 letter written by Kennedy, [Romney campaign consultant Charles] Manning responded, ‘I think the reason they don’t trust Ted Kennedy is that he flip-flopped on abortion. He was pro-life before Roe v. Wade and now he’s changed. Mitt has always been consistent in his pro-choice position and that’s why the group respects him.’” (Bruce Mohl, “Mass. Antiabortion Group Backs Romney,” *The Boston Globe*, 9/8/94)

Romney In 1994: “I Think It’s Important That People See Me Not As A Pro-Life Candidate.” “Republican U.S. Senate hopeful W. Mitt Romney further distanced himself from anti-abortion forces at the start of the GOP state convention in Springfield, saying he does not want to be labeled a ‘pro-life’ candidate. Anti-abortion delegates are expected to caucus before today’s convention vote, but Romney said he will not meet with them. ‘I’m not seeking their endorsement,’ said Romney, who remains the clear favorite to win the party’s endorsement today. ‘I think it’s important that people see me not as a pro-life candidate.’” (Joe Battenfeld, “Romney Assumes Role Of Favorite,” *Boston Herald*, 5/14/94)

Romney Also Backed RU-486 Access During His ‘94 Race. “GOP Senate hopeful W. Mitt Romney, who has been accused of waffling on abortion, came down more firmly in the abortion rights camp yesterday, voicing support for the RU-486 ‘morning after’ abortion pill and a bill to ensure clinic access.” (Andrew Miga, “Romney Leans Toward Abort Rights Camp,” *Boston Herald*, 5/19/94)

- **“[Romney] Has Won Praise From Abortion Rights Groups ... For Endorsing The Legalization Of RU-486, The Abortion-Inducing Drug Used In Europe.”** (Scot Lehigh, “Romney Admits Advice Against Abortion,” *The Boston Globe*, 10/20/94)
- **Romney, On RU-486:** “I think it would be a positive thing to have women have the choice of taking the morning-after pill ... I would favor having it available.” (Andrew Miga, “Romney Leans Toward Abort Rights Camp,” *Boston Herald*, 5/19/94)

In 2002, Romney Filled Out Questionnaires Supporting Abortion Rights, State Funding For Abortions And Was Endorsed By Pro-Choice Groups

Romney Professed Support For Roe v. Wade, Public Funding Of Abortions. “On a questionnaire Planned Parenthood gave to the gubernatorial candidates in 2002, Romney answered ‘yes’ to the question, ‘do you support the substance of the supreme court decision in Roe v. Wade?’ Romney also professed support for state funding of abortion services for low-income women, [spokesperson Erin] Rowland said.” (Scott S. Greenberger, “Roe V. Wade Omitted From Proclamation,” *The Boston Globe*, 3/25/05)

- **Romney, In NARAL Questionnaire:** “I respect and will protect a woman’s right to choose. This choice is a deeply personal one ... Women should be free to choose based on their own beliefs, not mine and not the government’s. The truth is, no candidate in the Governor’s race in either party would deny women abortion rights. So let’s end this argument that does not exist and stop the cynical, divisive attacks made only for political gain.” (Stephanie Ebbert, “Clarity Sought On Romney’s Abortion Stance,” *The Boston Globe*, 7/3/05)

Romney Bragged Of Being Pro-Choice Since Before Roe v. Wade. “I don’t think it’s NARAL’s position to say who’s pro-choice and who’s not pro-choice ... I joined my mother in 1970 when she said she was in favor of legalizing abortion. I guess they’d say she wasn’t pro-choice because we didn’t have those items to vote for.” (Scot Lehigh, “Romney Labeled A ‘Pretender’ On Abortion Rights,” *The Boston Globe*, 10/12/94)

Romney Argued He Was Most Pro-Choice Candidate In 2002 Election. “Gubernatorial candidates Shannon O’Brien and Mitt Romney sparred ... over who was the strongest abortion rights supporter by touting endorsements from abortion rights groups and challenging each other’s records on the issue.” (John McElhenny, “O’Brien, Romney Tout Abortion Rights Credentials,” *The Associated Press*, 10/3/02)

- **“Romney ... Was Endorsed By The New York-Based Republican Pro-Choice Coalition.”** (John McElhenny, “O’Brien, Romney Tout Abortion Rights Credentials,” *The Associated Press*, 10/3/02)

In 2002, Romney Opposed Mandatory Counseling And Waiting Periods

***Boston Magazine*, Circa 2002: Romney Opposed “Any Curtailment Of Existing Abortion Rights, Including The Anti-Abortion Movement’s Attempts To Impose Mandatory Counseling And Waiting Periods.”** “According to [Romney’s] written response to an abortion-rights group questionnaire, Romney supports a ban on partial-birth abortions but otherwise opposes any curtailment of existing abortion rights, including the anti-abortion movement’s attempts to impose mandatory counseling and waiting periods.” (Jon Keller, “Latter-Day Complaints,” *Boston Magazine*, 6/02)

Romney Affirmed His Support For Roe v. Wade Decision In Both Of His Previous Campaigns

1994: Romney Said He Would “Sustain And Support” Roe v. Wade. “I believe that abortion should be safe and legal in this country. I have since the time that my mom took that position when she ran in 1970 as a US Senate candidate. I believe that since Roe v. Wade has been the law for 20 years we should sustain and support it.” (Joan Vennochi, “Romney’s Revolving World,” *The Boston Globe*, 3/2/06)

2002: Romney Confirmed His Support For Roe v. Wade Decision In Planned Parenthood Questionnaire. “On a questionnaire Planned Parenthood gave to the gubernatorial candidates in 2002, Romney answered ‘yes’ to the question, ‘Do you support the substance of the Supreme Court decision in Roe v. Wade?’” (Scott S. Greenberger, “Roe V. Wade Omitted From Proclamation,” *The Boston Globe*, 3/25/05)

Romney Has More Than Once Become “Firmer” In His Position On Abortion

1994 Romney Spokesman: “As Mitt has studied the issues with regard to choice more and more and talked with a lot of people about them, he has become firmer in his position.” (Scot Lehigh, “Romney Takes More Heat On Abortion,” *The Boston Globe*, 9/10/94)

2007 Romney Spokesman: “[T]his was clearly an issue where the governor realized he was wrong in the past and is clearly and firmly dedicated to advocating the position of protecting life.” (Glen Johnson, “Romney’s Abortion Views First Shaped By Personal, Then Clinical,” *The Associated Press*, 2/7/07)

Romney Became More Pro-Choice As 1994 Senate Race Went On, First Opposing – Then Backing – Federal Funding Of Abortion

February 1994: Romney Claimed He Opposed Medicaid-Funded Abortions. “[Romney] also said he would oppose spending public money for Medicaid-funded abortions. ‘I am not in favor of government funding of abortion,’ he said. ‘I don’t think government should either promote or prevent abortion.’” (Scot Lehigh and Frank Phillips, “GOP’s Romney Declares, Says Kennedy Out Of Date,” *The Boston Globe*, 2/3/94)

Later In The Campaign, Romney Changed Positions And Backed States’ Rights To Offer Medicaid-Funded Abortions. “More recently, Romney ... has also said that he would leave the decision about Medicaid abortions to the states.” (Scot Lehigh, “Romney Takes More Heat On Abortion,” *The Boston Globe*, 9/10/94)

- **Spokesman: Romney “Would Leave To The States The Decision On Whether To Use Federal Funds For Abortion.”** “Manning said Romney wants to leave health care abortion coverage to the consumer, would support the Freedom of Choice act as long as went no further than codifying Roe v. Wade, and would leave to the states the decision on whether to use federal funds for abortion.” (Scot Lehigh and Frank Phillips, “Lakian, Romney Try Finger-Pointing,” *The Boston Globe*, 9/9/94)
- **“Asked How [Ted] Kennedy And Romney Differ On The Abortion Issue, [Romney Aide Charles] Manning Said, ‘It’s Tiny Nuances.’”** (Bruce Mohl, “Mass. Antiabortion Group Backs Romney,” *The Boston Globe*, 9/8/94)

By September 1994, Romney Was For Abortion Coverage In Federal Health Plans, Codifying Roe v. Wade And Federal Abortion Funding. “Romney supports a federal health care plan option that includes abortion services, would vote for a law codifying the 1972 Roe v. Wade decision that legalized abortion and backs federal funding for abortions as long as states can decide if they want the money, [a spokesman] said.” (Ed Hayward, “Anti-Abortion Group Endorses Romney Bid,” *Boston Herald*, 9/8/94)

Romney’s Wife Contributed To Planned Parenthood

Romney’s Wife Ann Made Contribution To Planned Parenthood In 1994, Check Written “From The Romney’s Joint Checking Account.” “As abortion continues to define the Republican presidential primary, Mitt Romney’s campaign said yesterday that Romney’s wife, Ann, made a \$150 contribution to Planned Parenthood in

1994, the year Romney ran for Senate as a candidate supporting abortion rights. Romney spokesman Kevin Madden said Ann Romney does not remember whether it was a straight donation to the abortion rights group, which supports abortion rights, or whether she wrote the check as an admission fee for an event. ... Madden confirmed the payment in response to a question from the Globe asking whether Romney or his wife had given to the organization. He said the check was written from the Romneys' joint checking account ..." (Scott Helman, "Romney's Wife Made Contribution To Planned Parenthood," *The Boston Globe*, 5/10/07)

ROMNEY ON ABORTION AS GOVERNOR

Romney Says That During His As Governor Tenure He Was "Consistently ... Pro-Life," But His Actions Dispute Such A Claim

Romney Now Says He Was Effectively A Pro-Life Governor. ROMNEY: "You don't have to take my word for it. You can look at what I did as a governor. And as a governor I came down on the side of life." (Fox News' "Hannity & Colmes," 5/7/07)

Romney Claim: "You Can See In My Record As Governor That I Have Consistently Been Pro-Life." ROMNEY: "[Y]ou can look at my record as governor, and you can see in my record as governor that I have consistently been pro-life. Every piece of legislation that dealt with life..." CNN's JOHN ROBERTS: "Even though you were effectively pro-choice?" ROMNEY: "You know, as governor, all the decisions I made as governor and all the bills that came to my desk were – I came down on the side of life. So when I ran for office, I was effectively pro- choice. I didn't call myself pro-choice, but I said I would keep the law the way it was. But the first time as governor that I saw a piece of legislation that dealt with life, I came down on the side of life." (CNN's "American Morning," 6/18/07)

ABC News: "Several Actions Romney Took Mere Months After" His Abortion Epiphany "Call Into Question How Deep-Seated His Conversion Truly Was." "Former Massachusetts Gov. Mitt Romney has long cited a November 2004 meeting with a Harvard stem-cell researcher as the moment that changed his long-held stance of supporting abortion rights to his current 'pro-life' position opposing legal abortion. But several actions Romney took mere months after that meeting call into question how deep-seated his conversion truly was." (Rick Klein and Jake Tapper, "Romney's Pro-Life Conversion: Myth Or Reality?" [ABC News](#), 6/14/07)

Romney Appointed Pro-Choice Judge Just Two Months After His Abortion "Conversion"

"Within Two Months Of His Epiphany On This Issue, Romney Appointed To A Judgeship A Democrat Who Was An Avowed Supporter Of Abortion Rights." (Rick Klein and Jake Tapper, "Romney's Pro-Life Conversion: Myth Or Reality?" [ABC News](#), 6/14/07)

Romney Appointed Matthew Nestor To The Somerville District Court In January 2005. (Mitt Romney, Letter To The Executive Council, 1/18/05)

Nestor Is Pro-Choice, A Position He "Stressed" During State House Campaign. "Nestor was born in Lynn, grew up in Randolph and graduated from Wesleyan University and Boston College Law School. ... In the campaign, he has stressed his support for the death penalty and welfare reform as well as a pro-choice stance on abortion, issues on which he and Jones agree.." (Andy Dabilis, "Jones, Nestor Lock Horns In 21st Middlesex Contest," *The Boston Globe*, 10/16/94)

Republican Strategist Keith Appell: "This would appear to be evidence that he bowed to political pressures instead of following his supposed judicial philosophy, and that's what the conservative base of the Republican Party is very leery of ... If you espouse a certain judicial philosophy, your appointments should reflect it." (Rick Klein and Jake Tapper, "Romney's Pro-Life Conversion: Myth Or Reality?" [ABC News](#), 6/14/07)

Romney Health Care Plan Expanded Access To Abortion, Required Planned Parenthood Representative On State Policy Panel

October 2006: Romney Took Credit For "Officially" Launching Commonwealth Care, Calling It "Key Component" Of RomneyCare. "The following information was released by the Massachusetts Office of the Governor: Governor Mitt Romney today officially launched Commonwealth Care, an innovative health insurance product that will allow thousands of uninsured Massachusetts residents to purchase private health insurance products at affordable rates. Commonwealth Care is a key component of the state's landmark healthcare reform law approved by the Governor in April. 'We are now on the road to getting everyone health insurance in

Massachusetts,' said Governor Romney. ... 'Today, we celebrate a great beginning.'" ("Romney Unveils First New Healthcare Reform Product," *States News Service*, 10/2/06)

- **Romney:** "Earlier this year, I offered a plan called Commonwealth Care that opens the market to much lower-cost insurance than is now available." (Mitt Romney, Op-Ed, "Health-Care Reform Gets A Fair Shake," *Boston Herald*, 6/21/05)

Under Commonwealth Care, State Pays For Coverage For Those Earning Less Than Federal Poverty Level And "Subsidizes" Insurance For Those Making Up To Three Times Poverty Level. "For individuals ... earning less than the federal poverty level of \$10,210, the state created a new program called Commonwealth Care to offer essentially free coverage. The state already has signed up 63,000 of the estimated 140,000 of its poorest residents. ... For those making slightly more up to three times the federal poverty level or \$30,630 for an individual the state requires payments between \$18 and \$106 a month in premiums depending on their income, but still subsidizes a portion of the cost." (Steve LeBlanc, "Massachusetts Celebrates Anniversary Of Landmark Health Care Law," *The Associated Press*, 4/11/07)

Commonwealth Care, Which Is "Funded By The State," Provides Access To Abortion Services. "Commonwealth Care is run by the Commonwealth Health Insurance Connector Authority and funded by the state. ... Commonwealth Care health plans include: outpatient medical care (doctor's visits, surgery, radiology and lab, abortion, community health center visits) ..." (MassResources Website, www.massresources.org, Accessed 2/5/07)

As Of June 1, 2007, Commonwealth Care Enrollment Had Reached 79,000 People. "Enrollment in Commonwealth Care, the subsidized program for people with income not exceeding 300 percent of the federal poverty level (\$30,630 for an individual and \$61,950 for a family of four), spiked to more than 79,000 as of June 1. This marks an increase of 10,000, or 15 percent, over the previous month." (Commonwealth Health Insurance Connector Authority, Press Release, 6/4/07)

Section 3 Of The Health Care Reform Bill Romney Signed In To Law Requires That One Member Of MassHealth Payment Policy Board Must Be Appointed By Planned Parenthood Of Massachusetts. From Chapter 58 of the Acts of 2006: "SECTION 3. Chapter 6A of the General Laws is hereby amended by inserting after section 16I the following 6 sections: . . . Section 16M. (a) There shall be a MassHealth payment policy advisory board. The board shall consist of the secretary of health and human services or his designee, who shall serve as chair, the commissioner of health care financing and policy, and 12 other members: ... 1 member appointed by Planned Parenthood League of Massachusetts ..." (Massachusetts General Court Website, www.mass.gov, Accessed 2/5/07)

- **In June 2007, Romney Denied His Bill Included The Planned Parenthood Mandate.** QUESTION: "I noticed some of the conservative groups back in Massachusetts, they complain about there's a Planned Parenthood rep mandate to be on the planning board for the health care plan. Is that something you just had to deal with in negotiating with the legislature?" ROMNEY: "It's certainly not something that was in my bill." (Eric Krol, "Full Text Of Romney Interview," [Arlington Heights, IL] *Daily Herald*, 6/17/07)

Romney Signed Bill Expanding Family Planning, Morning-After Pill Distribution In Massachusetts

In October 2005, Romney Signed Bill Expanding Family Planning Services, Including Abortion Counseling And Morning-After Pill. "Governor Mitt Romney has signed a bill that could expand the number of people who get family-planning services, including the morning-after pill, confusing some abortion and contraception foes who had been heartened by his earlier veto of an emergency contraception bill. ... The services include the distribution of condoms, abortion counseling, and the distribution of emergency contraception, or morning after pills, by prescription ..." (Stephanie Ebbert, "Romney Signs Bill On Family Planning," *The Boston Globe*, 10/15/05)

- **Law Called For State To Seek Federal Waiver To Expand Number Of Low-Income Residents Eligible For Family Planning Services By Estimated 88,000 People.** "The new law calls for the state to seek a federal waiver to expand the number of low-income people eligible for comprehensive family-planning services statewide. If the federal government approves the waiver, an estimated 88,000 more people would be eligible, said Richard Powers, spokesman for the state's Executive Office of Health and Human Services." (Stephanie Ebbert, "Romney Signs Bill On Family Planning," *The Boston Globe*, 10/15/05)

Romney Had Previously Argued That Morning-After Pills "Cause Abortions." "In July, Romney vetoed a bill to expand the use of the morning-after pills by requiring hospitals to offer them to rape victims and requiring pharmacists to dispense them without prescriptions. At the time, the governor embraced opponents' argument

that the pills not only prevent pregnancies, but cause abortions. The Legislature overrode the veto in September.” (Stephanie Ebbert, “Romney Signs Bill On Family Planning,” *The Boston Globe*, 10/15/05)

- **In July 2005 *Boston Globe* Op-Ed, Romney Argued That Morning-After Pill Plan B Would “Terminate Life After Conception.”** “Yesterday I vetoed a bill that the Legislature forwarded to my desk. Though described by its sponsors as a measure relating to contraception, there is more to it than that. The bill does not involve only the prevention of conception: The drug it authorizes [Plan B emergency contraception] would also terminate life after conception.” (Mitt Romney, “Why I Vetoed Contraception Bill,” *The Boston Globe*, 7/26/05)

Romney Communications Director Eric Fehrstrom “Suggested That The Decision Was Not Controversial.” “The administration did not publicize the waiver request. Yesterday, the governor’s communications director, Eric Fehrstrom, suggested that the decision was not controversial.” (Stephanie Ebbert, “Romney Signs Bill On Family Planning,” *The Boston Globe*, 10/15/05)

- **Fehrstrom:** “The Commonwealth already provides these health services to low-income women, and we have no objection to the Legislature’s directive that we seek a waiver to expand the eligible population to women with a slightly higher income ...” (Stephanie Ebbert, “Romney Signs Bill On Family Planning,” *The Boston Globe*, 10/15/05)

“[R]omney’s Move Has Left Some Conservatives Across The Country Confused ...” (Stephanie Ebbert, “Romney Signs Bill On Family Planning,” *The Boston Globe*, 10/15/05)

- **Joseph M. Scheidler, Pro-Life Action League:** “The guy’s not coming around ... If he’s trying to win prolife folks, he won’t get the hardcore. ... If he were consistent, he would have vetoed that ...” (Stephanie Ebbert, “Romney Signs Bill On Family Planning,” *The Boston Globe*, 10/15/05)

As Governor, Romney Ordered Catholic Hospitals To Distribute Emergency Contraception

In December 2005, Romney “Abruptly Ordered His Administration To Reverse Course ... And Require Catholic Hospitals To Provide Emergency Contraception To Rape Victims.” “Gov. Mitt Romney abruptly ordered his administration to reverse course yesterday and require Catholic hospitals to provide emergency contraception medication to rape victims. In a turnaround that foes derided as politically motivated, Romney directed his Department of Public Health to scrap rules that exempted the Catholic institutions from a new law governing the medicine.” (Kimberly Atkins, “Romney Flip Nixes Hospital Exception On Post-Rape Drug,” *Boston Herald*, 12/9/05)

- **Romney:** “It’s the right thing for hospitals to provide information and access to emergency contraception to anyone who is a victim of rape.” (Dave Wedge, “Merry Christy,” *Boston Herald*, 12/11/05)
- **Romney:** “My personal view in my heart of hearts is that people who are subject to rape should have the option of having emergency contraceptives or emergency contraceptive information ...” (Kimberly Atkins, “Romney Flip Nixes Hospital Exception On Post-Rape Drug,” *Boston Herald*, 12/9/05)

Romney Had Initially Supported State Ruling Allowing Hospitals To Opt Out On Moral Grounds. “The decision overturns a ruling made public this week by the state Department of Public Health that privately run hospitals could opt out of the requirement if they objected on moral or religious grounds. Romney had initially supported that interpretation...” (Scott Helman, “Romney Says No Hospitals Are Exempt From Pill Law,” *The Boston Globe*, 12/9/05)

***Boston Herald* Called It “An Olympic-Caliber Double Flip-Flop.”** “Flip, flop, flip. Yes, Gov. Mitt Romney has now executed an Olympic-caliber double flip-flop with a gold medal-performance twist-and-a-half on the issue of emergency contraception. ... It’s no secret Mitt Romney would like to be president. But who would have thought he’d take John Kerry as his campaign role model?” (Editorial, “Politics On Display The Morning-After,” *Boston Herald*, 12/9/05)

ROMNEY ON ABORTION IN 2007

In Early 2007, Romney Gave South Carolina Audiences Conflicting Answers On His Abortion Position

Romney In South Carolina, January 29: “Over the last multiple years, as you know, I have been effectively pro-choice ... I never called myself that as a label but I was effectively pro-choice and that followed a personal experience in my extended family that led to that conclusion.” (Bruce Smith, “Romney Campaigns In SC With Sen. DeMint,” *The Associated Press*, 1/30/07)

Romney In South Carolina, February 8: “I am firmly pro-life ... I was always for life.” (Jim Davenport, “Romney Affirms Abortion Opposition During Stop In SC,” *The Associated Press*, 2/8/07)

Romney Refused To Comment On South Carolina Legislation That Would Require Pregnant Women To Be Offered View Of Ultrasound Image Of Fetus Before Choosing An Abortion

Romney “Refused To Comment” On Bill Pending In South Carolina Legislature Requiring That Abortion Doctors Offer Women Option Of Viewing Ultrasound. “In a campaign stop in South Carolina at the end of last week, Republican presidential candidate Mitt Romney refused to comment on a bill pending in the South Carolina legislature that is a new trend in reducing abortions. The measure would require abortion practitioners to allow women a chance to see an ultrasound. ... It follows on research showing that a high number of abortion-minded women who see ultrasounds at pregnancy centers decide to keep their baby.” (Steven Ertelt, “Mitt Romney Won’t Comment On South Carolina Abortion-Ultrasound Bill,” *Life News*, 4/17/07)

- **“Romney Appeared To Sidestep The Question” When Asked If He Supported The Measure.** “The legislation enjoys the support of other top GOP presidential candidates, but Romney appeared to sidestep the question when asked whether he backed it. ‘I would like to see each state be able to make its own law with regard to abortion,’ Romney told AP when asked a question about his stance on it. ‘I think the Roe v. Wade one-size-fits-all approach is wrong.’” (Steven Ertelt, “Mitt Romney Won’t Comment On South Carolina Abortion-Ultrasound Bill,” *Life News*, 4/17/07)
- **“[Romney] Declined Friday To Weigh In ... [T]he Former Massachusetts Governor Said States Should Make Their Own Abortion Laws.”** (Meg Kinnard, “Romney Sidesteps Ultrasound Viewing Requirement For Abortion,” *The Associated Press*, 4/13/07)

Huckabee, McCain, Brownback All Support Ultrasound Bill. “Other candidates were more specific on the measure in interviews with the newspaper. Former Arkansas Gov. Mike Huckabee, who has signed pro-life bills into law as governor in his state, says he backs the idea. ... Arizona Sen. John McCain says he, too, favors the abortion-ultrasound requirement. ... Kansas Sen. Sam Brownback said he supported the bill as well.” (Steven Ertelt, “Mitt Romney Won’t Comment On South Carolina Abortion-Ultrasound Bill,” *Life News*, 4/17/07)

Pro-Life Groups, Pro-Choice Groups And Romney’s Own Advisors Have Been Confused About His Abortion Stance

Romney Advisor James Bopp, Circa 2007: “I’m Really Not Sure Where [Abortion] Will Ultimately Fit In His Agenda. He’s Still On A Journey.” “Will any of these candidates really advocate to end abortion, or are they just paying lip service on an important issue to the base? ... ‘I don’t know yet about Romney,’ [Romney advisory James] Bopp admits. ‘I’m not really sure where [abortion] will ultimately fit in his agenda. He’s still on a journey.’” (Jonathan Martin, “Abortion Wars (Cont.),” *Politico*, www.politico.com, 2/21/07)

In 2005, Confusion Reigning Over Romney’s Abortion Beliefs. “Advocates on both sides of the abortion debate say they are confused over Governor Mitt Romney’s position on abortion and are seeking to understand the meaning of recent comments he has made, in light of the positions he outlined during the 2002 gubernatorial campaign.” (Stephanie Ebbert, “Clarity Sought On Romney’s Abortion Stance,” *The Boston Globe*, 7/3/05)

2002: Romney Declined To Fill Out Massachusetts Citizens For Life’s Questionnaire. “[Massachusetts Citizens for Life’s Marie Sturgis said] ‘We honestly don’t know where he stands on this issue.’ ... When he ran for governor in 2002, she said, her group considered him an abortion rights supporter; Romney declined to complete the Citizens for Life questionnaire.” (Stephanie Ebbert, “Clarity Sought On Romney’s Abortion Stance,” *The Boston Globe*, 7/3/05)

- **New York Sun’s Ryan Sager, On Romney And Massachusetts Citizens For Life:** “[D]uring his 2002 campaign for governor, Mr. Romney ran away from the group’s endorsement at a televised debate like a dog from a vacuum cleaner.” (Ryan Sager, “Political Video Of The Day: Romney And Mass. Citizens For Life,” *New York Sun’s Politics Blog*, 5/9/07)

In 2005, Massachusetts Citizens For Life Still Considered Romney To Be An Abortion Rights Supporter. “[Sturgis] said she hasn’t detected any change in Romney’s stance. The group considers Romney to be an abortion-rights supporter, as do national antiabortion groups such as the Family Research Council.” (Scott S. Greenberger, “Roe V. Wade Omitted From Proclamation,” *The Boston Globe*, 3/25/05)

Romney In Early 2002: Don’t Call Me Pro-Choice Or Pro-Life. His position on abortion is already an issue because Romney insists on not being labeled either pro-life or pro-choice. ‘People have to look at my views piece

by piece, and they can decide what to call me,' he said. ... 'I do not favor the choice of abortion,' he said. 'I do, however, if I am elected governor, believe that is it my responsibility to protect the right of a woman to make that choice herself.'" (Lisa Riley Roche, "At Peace In Massachusetts," *Deseret News*, 4/28/02)

 **Romney In Late 2002: "I Do Not Take The Position Of A Pro-Life Candidate."** (David Guarino, "Last Brawl," *Boston Herald*, 10/30/02)

In Early 2005, Romney Refused To Say Where He Stood On Abortion In Any Other Context Than Governor. "Asked in an interview with *Washington Post* reporters in February 2005 whether he favored making abortion illegal, he replied: 'I'm telling you exactly what I will do as governor of Massachusetts, but I'm not going to tell you what I'd do as mayor of Boston or a congressman or any of those positions.'" (Dan Balz and Shailagh Murray, "Mass. Governor's Rightward Shift Raises Questions," *The Washington Post*, 12/21/06)

Romney Falsely Claimed President Bush Was Pro-Choice Before He Became Pro-Life

Romney Recently Claimed President George W. Bush "Was Pro-Choice Before He Became Pro-Life." "Former Massachusetts Gov. Mitt Romney said this week that President Bush 'was pro-choice before he became pro-life,' an assertion the Romney campaign now acknowledges was inaccurate. The remark was based on a magazine article Romney had read, his campaign said." (Mike Allen, "Romney Misstates Past Bush View On Abortion," *The Politico*, www.politico.com, 2/25/07)

White House Responded That President Bush Has Always Been Pro-Life. "The White House said Bush has always been 'pro-life.' During the presidential race of 2000, Dan Bartlett – then a spokesman for the Bush campaign, now the White House counselor – was asked about a quotation from a Texas newspaper in 1978 suggesting Bush's position had been unclear. Bartlett told *The Washington Post*: 'The governor was pro-life before he ran for Congress, during his run for Congress and after he ran for Congress.' A White House official said Friday that Bartlett's quote is still accurate today." (Mike Allen, "Romney Misstates Past Bush View On Abortion," *The Politico*, www.politico.com, 2/25/07)

Romney Campaign Said Romney's Remark Was "Off The Cuff" And Based On One Op-Ed Column. "Romney's campaign said the comment was off the cuff and was based on a National Review article, which remained on Romney's Web site Saturday morning, asserting that "George W. Bush ran as a pro-choice politician in his 1978 congressional campaign." (Mike Allen, "Romney Misstates Past Bush View On Abortion," *The Politico*, www.politico.com, 2/25/07)

STEM CELL RESEARCH

Romney Was Once Emphatically In Favor Of Embryonic Stem Cell Research

June 2002: Romney "Spoke Extensively" About His Support For Embryonic Stem Cell Research At Bioethics Forum. "Speaking at a bioethics forum, GOP gubernatorial hopeful Mitt Romney yesterday endorsed embryonic stem cell research ... [Romney] endorsed embryonic stem cell research, saying the controversial science might one day help treat his wife's multiple sclerosis in addition to numerous other degenerative diseases. ... Romney spoke extensively about his position on stem cell research, which also involves embryo destruction." (Raja Mishra, "Romney Endorses Stem Cell Research, Is Silent On Cloning," *The Boston Globe*, 6/14/02)

- **Romney Promised To "Work And Fight For Stem Cell Research," Criticized President Bush's 2001 Policy.** "'I am in favor of stem cell research. I will work and fight for stem cell research,' [Romney] said, adding, 'I'd be happy to talk to [President Bush] about this, though I don't know if I could budge him an inch.' Last summer, Bush set tight limits on taxpayer-funded embryonic stem cell research..." (Raja Mishra, "Romney Endorses Stem Cell Research, Is Silent On Cloning," *The Boston Globe*, 6/14/02)

In 2004, Romney Reiterated Support At Biotech Conference, Saying He Didn't Want "Any Impediment To Doing Research In Massachusetts." "In his remarks, Mr. Romney also said he supported stem cell research ... 'We don't want there to be any impediment to doing research in Massachusetts, any impediment that would take you to another state,' Mr. Romney said." (Lisa Eckelbecker, "Leaders Deride Drug Imports," *Telegram & Gazette* [Worcester, MA], 4/30/04)

As Of February 2005, Romney Took A "More Liberal Position Than The President's" On Stem Cell Research. "Under a Bush administration policy announced Aug. 9, 2001, researchers can only use federal funding on batches of embryonic stem cells created before that date. Romney said that scientists should be able

to work with those embryonic stem cells, but also with embryonic stem cells created after that date, as long as they have been made from embryos generated for fertility clinics that otherwise would have been discarded. This represents a more liberal position than the president's." (Gareth Cook, "Stem Cell Research Holds Promise Against Many Illnesses," *The Boston Globe*, 2/11/05)

Romney Later "Stunned" Scientists And Observers By Trying To Criminalize Form Of Embryonic Stem Cell Research That Creates Embryos For Scientific Purposes

In 2005, Romney Vetoed Legislation That Allowed Research On Eggs Created Via "Somatic Cell Nuclear Transfer." "Romney vetoed the legislation, in part, because it allowed somatic cell nuclear transfer, or "therapeutic cloning" -- using human eggs specifically for research. ... 'It is wrong to allow science to take an assembly line approach to the production of human embryos, the creation of which will be rooted in experimentation and destruction,' Romney said in a May 27, 2005, letter to lawmakers explaining his veto." (Glen Johnson, "Healey Splits With Romney And Favors Stem Cell Research," *The Associated Press*, 2/27/06)

- **"Romney's Opposition Stunned Scientists, Lawmakers And Observers..."** "At a campaign appearance at Brandeis University in June 2002, Romney strongly endorsed stem cell research. At that event and in several instances since, he declined to offer an opinion on embryo cloning ... But on Feb. 10, 2005 ... Romney came out strongly against the cloning technique ... He vowed to press for legislation to criminalize the work. Romney's opposition stunned scientists, lawmakers, and observers because of his past statements endorsing, at least in general terms, embryonic stem cell research." (Scott Helman, "Romney's Journey To The Right," *The Boston Globe*, 12/17/06)

Romney Has Actively Worked To Curtail And Even Outlaw Embryonic Stem Cell Research In Massachusetts. "[L]ast year, [Romney] said that human embryos should never be created for the purpose of scientific research. ... Last year, Massachusetts lawmakers supported a bill that would allow scientists to use human embryos created for research, overriding Romney's veto. In August, the spat between Romney and lawmakers resurfaced when Romney-appointed regulators imposed new guidelines for stem cell research that critics deemed more restrictive than the state's stem cell law." (Sarah Liebowitz, "Romney Reaching To Right," *Concord Monitor*, 12/10/06)

Six Months After His November 2004 Conversion On Life Issues, Romney Endorsed Federal Legislation That Provided Funding For Research On Surplus Embryos From In Vitro Fertilization Procedures

In May 2005 – Six Months After His Supposed "Conversion" On Life Issues – Romney Stated His Support For Federal Bill That Provided Funding For Research On Surplus Embryos From Fertility Clinics. "In response to a question then, Mr. Romney drew a distinction between the House bill and the state measure. 'The United States House of Representatives voted for a bill that was identical to what I proposed,' Mr. Romney said. 'They voted to provide for surplus embryos from in vitro fertilization processes being used for research and experimentation. That's what I said I support.'" (Michael Luo, "Romney Faces Another 'Flip-Flop' Question: Has He Changed On Stem Cells?" *The New York Times*, 6/15/07)

 **Romney Called Congressional Bill "Identical To What I Proposed ... What The U.S. House Of Representatives Is Doing Is Exactly What Gov. Romney Proposed."** "The United States House of Representatives voted for a bill that was identical to what I proposed ... They voted to provide for surplus embryos from in vitro fertilization processes to be used for research and experimentation. That's what I have said I support. That's what they have just supported. ... What is done in Washington is consistent with what I have said I support which is using surplus embryos from fertilization processes. ... So it would be helpful if people pointed out that in fact what the U.S. House of Representatives is doing is exactly what Gov. Romney proposed." (Rick Klein and Jake Tapper, "Romney's Pro-Life Conversion: Myth Or Reality?" ABCNews.com, 6/14/07)

"Scarcely Two Years Later, Former Gov. Romney Now Said He Would Oppose That House Bill." (Rick Klein and Jake Tapper, "Romney's Pro-Life Conversion: Myth Or Reality?" ABCNews.com, 6/14/07)

 **Romney Currently Opposes Government Funding For Embryos From In Vitro Fertilization Processes But Supports Allowing The Research To Go Forward.** "[I]n a little-noticed moment at the first Republican presidential debate, last month in California, Mr. Romney was asked whether he would encourage broader federal financing. When he did not directly answer that question, he was pressed on whether scientists should be able to do research at all on embryos that fertility clinics would otherwise discard anyway. Mr. Romney said he would be 'happy to allow that,' then stopped himself and said: 'I shouldn't say happy. It's fine for that to be allowed, to be

legal. I won't use our government funds for that.'" (Michael Luo, "Romney Faces Another 'Flip-Flop' Question: Has He Changed On Stem Cells?" *The New York Times*, 6/15/07)

Romney Said He Had No Ethical Problem With Using Surplus Embryos From Fertility Procedures For Stem Cell Research

In May 2005, Romney Said He Had No Ethical Problem With Surplus IVF Embryos Being Used For "Research And Experimentation." FOX's CHRIS WALLACE: "[S]pecifically, you don't see, as I understand it, the use of these leftover embryos in fertility clinics as destroying life?" ROMNEY: "That's right. I believe that when a couple gets together and decides that they want to bring a child into the Earth, and they go to a fertility clinic to do so, and if they're going to be through that process a leftover embryo or two, that they should be able to decide whether to preserve that embryo for future use or to destroy it; to have it put up for adoption or potentially to be used for research and experimentation, hopefully leading to the cure of disease. And so for me, that's where the line is drawn. Those surplus embryos from fertility clinics can be used for research." (Fox's "Fox News Sunday," 5/22/05)

- **Romney:** [I] can't imagine politics or ambition for anyone would stand in the way with doing what they think is right for the family of humankind on an issue like this." (Fox's "Fox News Sunday," 5/22/05)

Romney Has Been Criticized By Conservatives For Trying To Have It Both Ways On Stem Cell Issue

2007: Romney Campaign Told Conservative Blog Romney Supports Research Methods "That Do Not Destroy The Embryo." "Here's what [Romney's] press office told me as to what his official position is: 'Governor Romney supports using adult stem cells and other alternative methods that do not destroy the embryo. Governor Romney supports stem cell research but opposes scientifically creating life "cloning" for medical research.'" (David Brody, "Romney on Stem Cells," *The Brody File Blog*, www.cbn.com, 1/16/07)

- **Claim: Romney Has Opposed "Embryo Destructive Research."** "Governor Romney supports adult stem cell research but has opposed efforts to advance embryo destructive research in Massachusetts and he has not supported public funding for embryo destructive research." (Romney For President Exploratory Committee, Press Release, 2/5/07)

But Romney Supports Research On Surplus Human Embryos From In-Vitro Fertilization, Which Destroys The Embryo. "Stem cell research does not require the cloning of human embryos. Some stem cells today are obtained from surplus embryos from in-vitro fertilization. I support that research, provided that those embryos are obtained after a rigorous parental consent process that includes adoption as an alternative." (Mitt Romney, Op-Ed, "The Problem With The Stem Cell Bill," *The Boston Globe*, 3/6/05)

Group Founded By Phyllis Schlafly Noted Romney's "Mixed Signals" On Stem Cell Research. "Massachusetts Governor Mitt Romney is being touted by some as a potential 2008 presidential candidate. Again, we have a politician who has recently sent mixed signals as to where he stands on the life issues. He likes to say he is 'pro-life.' However, while he says he opposes the cloning of human embryos, he supports using embryos generated in IVF clinics for experimentation – a distinction without a difference. An embryo is an embryo, period!" (Republican National Coalition For Life, "RNC For Life Report," Spring 2006)

Republican National Coalition For Life: "Mitt Romney's Position On Embryonic Stem Cell Research Is Not Pro-Life, And No One Should Say That It Is." (Republican National Coalition For Life's "Fax Notes," 2/3/07)

***Boston Globe* Noted Romney's Tendency To Want It Both Ways On Stem Cell Issue.** "Governor Mitt Romney's national fund-raising operation sent a mass mailing to Republican Party leaders and elected officials in 17 states this month ... The letter ... highlights his opposition to the 'human cloning' provision of the stem cell bill the Legislature recently approved, without noting that Romney himself supports research on surplus embryos from fertility clinics, which anti abortion groups oppose." (Scott Greenberger, "Committee Promotes Romney Record," *The Boston Globe*, 6/17/05)

Romney Flip-Flopped On Importance Of Stem Cell Research To Massachusetts Biotech Industry

In 2002, Romney Spokesman Claimed Biotech Industry Depended On Stem Cell Research. "'Mitt Romney supports stem cell research,' said Eric Fehrstrom, the governor-elect's spokesman. 'He believes the growth of our biotech industry at least partially depends on this type of research...'" (Jeffrey Krasner, "Bill Aims To Foster Stem Cell Work," *The Boston Globe*, 12/4/02)

In 2005, Romney Claimed Biotech Industry Did Not Depend On Stem Cell Research. “Some fear that, without cloning, Massachusetts biotech could fall behind other states. That is not the case. Only 3 percent of the biotech companies nationwide are doing stem cell research of any kind. The figure is even smaller in Massachusetts.” (Mitt Romney, Op-Ed, “The Problem With The Stem Cell Bill,” *The Boston Globe*, 3/6/05)

GAY RIGHTS

Romney Is Strong Opponent Of Gay Marriage, Claims States Should Have Ultimate Say

Romney “Favors States Being Able To Define Marriage As Being Between A Man And A Woman.” “He later told reporters that, while he favors states being able to define marriage as being between a man and a woman, he wouldn’t tell them what to do when it comes to domestic partner benefits. ‘I don’t have a problem with gay people being able to visit one another in the hospital,’ he said.” (Jim Davenport, “Romney Affirms Abortion Opposition During Stop In SC,” *The Associated Press*, 2/8/07)

In 2006, Romney Called McCain “Disingenuous” For Saying Gay Marriage Should Be Decided By The States. “McCain ... on Sunday told ABC News: ‘I believe that the issue of gay marriage should be decided by the states.’ ... ‘That’s his position, and in my opinion, it’s disingenuous,’ [Romney] said. ‘Look, if somebody says they’re in favor of gay marriage, I respect that view. If someone says – like I do – that I oppose same-sex marriage, I respect that view. But those who try and pretend to have it both ways, I find it to be disingenuous.’” (Bill Sammon, “Romney: ‘I’m A Conservative Republican,’” *The Examiner*, 11/21/06)

In 2007, Three Of Romney’s Own Massachusetts Supporters Voted Against Sending Gay Marriage Ban To Voters In Form Of Constitutional Amendment

Three Massachusetts State House Republicans Who Have Endorsed Romney Voted Against Sending Gay Marriage Ban To Voters. Romney supporters and State House Reps. Bradley Jones, Bradford Hill and Richard Ross voted against sending gay marriage ban to Massachusetts voters. (Romney For President, “Massachusetts Leaders Endorse Governor Mitt Romney,” Press Release, www.mittromney.com, 2/15/07)

- **Romney Supporter Rep. Richard Ross Switched Vote From Supporting Gay Marriage Ban In January 2007 To Opposing It In June.** (“2nd Roll Call Vote On Ballot Question Proposing Gay Marriage Ban,” *The Associated Press*, 1/2/07)

Former Gov. Bill Weld, Who Has Endorsed Romney, Lobbied Against Sending Gay Marriage Ban To Voters

Former Massachusetts Governor Bill Weld Endorsed Romney For President In January 2007, Serves As Campaign’s New York State Co-Chair. “Former Massachusetts governor William F. Weld has emerged as a major backer of Mitt Romney, despite a long friendship with Rudolph W. Giuliani, the former New York City mayor who is a potential Romney rival in the race for the 2008 Republican presidential nomination. ... Weld is cochairman of Romney’s campaign in New York state.” (Brian C. Mooney, “Weld Backs Romney For Oval Office,” *The Boston Globe*, 1/9/07)

- **Weld Participated In Romney’s Debate Prep For June 5 New Hampshire Debate, Is Pictured In Wolfeboro With Romney And Top Advisors.** (Romney For President Website, <http://fivebrothers.mittromney.com>, 6/5/07)

Weld Strongly Opposed Putting Gay Marriage Ban On Ballot, Calling It A “Distraction.” “Former Gov. William F. Weld ... said Tuesday he hoped legislators would vote this week to kill a proposed constitutional amendment banning gay marriage in Massachusetts. Weld, in the Statehouse on behalf of Lehman Brothers, an investment banking firm, said: ‘I hope it doesn’t go on the ballot.’ He said if a constitutional convention votes Thursday to allow the measure on the November 2008 ballot, ‘I think it’s going to be a distraction for the next 18 months.’ Weld was an avid supporter of gay rights while serving as governor from 1991 to 1997, and he later attended the wedding of his former chief of staff, Kevin Smith, who is gay.” (“Former Governor Weld Says He Hopes Gay Marriage Ban Defeated,” *The Associated Press*, 6/12/07)

Weld Lobbied GOP State Legislator Against Amendment Allowing Voters To Decide On Gay Marriage In State. “With the Constitutional Convention just hours away, a proposal to allow voters to decide the future of same-sex marriage in Massachusetts was hanging by a thread in the Legislature last night. ... Some unexpected movement could come in the Senate, where an overwhelming majority, 32 of 40 members, voted last year to block the amendment from the ballot. Two more senators, Democrat Michael Morrissey of Quincy and Republican

Robert Hedlund of Weymouth, are now saying they are reconsidering and may oppose sending the amendment to the voters. ... Some of the state's major political figures have joined with Patrick, DiMasi, and Murray. US Senator Edward M. Kennedy has placed calls to Democratic legislators. Former governor William F. Weld, a Republican who was an early advocate of gay rights, also reached out to at least one GOP lawmaker, placing a call to Hedlund." (Frank Phillips, "Tight Vote Looms On Same-Sex Marriage Lobbying Intense On Both Sides," *The Boston Globe*, 6/14/07)

Weld, Who Supports Gay Marriage, Appointed Judge Who Wrote Opinion Legalizing Gay Marriage In State

Weld Appointed Judge Who Wrote Opinion Legalizing Gay Marriage In Massachusetts, Said He Was "Proud And Happy" With Her Stand On Gay Marriage. "Weld said he was 'proud and happy' Supreme Judicial Court Chief Justice Margaret Marshall, whom he appointed, took a stand backing gay marriage so 'we could all be here today.'" (Ann E. Donlan, "GOP: Gay Old Party," *Boston Herald*, 6/23/04)

- **Weld "Supports Abortion Rights And Gay Marriage."** (Michael Gormley, "Weld Drops Out Of New York Governor's Race," *The Associated Press*, 6/6/06)

Weld Endorsed Goodridge Decision, Later Officiated At Gay Marriage. "In 2003, shortly after the state Supreme Judicial Court delivered the ruling that led to the practice of gay marriage here, Weld endorsed the decision, and later officiated at a same-sex marriage." (*Statehouse News Service*, 6/12/07)

Romney Has Changed Positions On Several Gay Rights Measures, Including Gays In The Military And Employment Nondiscrimination Legislation

In 1994, Romney Claimed "You Will Not Have Me Taking Different Positions In Different Places." "Outlining ['94 GOP Senate candidate John] Lakian's shifting positions [on gay rights] on Wednesday, Romney essentially accused his rival of talking out of both sides of his mouth. 'You will hear me say the same thing again and again and again and you will not have me taking different positions in different places,' he said." (Scot Lehigh and Frank Phillips, "Lakian, Romney Try Finger-Pointing," *The Boston Globe*, 9/9/94)

That Year, Romney Endorsed Rep. Barney Frank's Employment Nondiscrimination Act (ENDA). "When he challenged Sen. Ted Kennedy, D-Mass., in 1994, Romney endorsed Rep. Barney Frank's, D-Mass., Employee Non-Discrimination Act which would have prohibited employers from making decisions about hiring, firing, promoting, or compensation based on sexual orientation." (Teddy Davis, "Romney Draws Fire For Shift On Gay Rights," ABC News' Political Radar [Blog](#), 4/23/07)

- **Romney:** "I am aware of the legislation that Barney Frank proposed and do support that and would vote in favor of that." (Chris Muther, "Romney: I'll Be Better Than Ted For Gay Rights," *Bay Windows*, 8/25/94)

Romney Now Opposes ENDA. "My experience over the past several years as governor has convinced me that ENDA would be an overly broad law that would open a litigation floodgate and unfairly penalize employers at the hands of activist judges." ("A Primary Factor," *National Review Online*, 12/14/06)

April 2007: Romney Is Criticized By Log Cabin Republicans After Reversing Prior Support For ENDA. "Mitt Romney's shifting stance on gay rights drew fire Monday from the president of the Log Cabin Republicans in advance of Tuesday's re-introduction of the Employee Non-Discrimination Act -- gay rights legislation whose main provisions Romney once supported but no longer does. 'Gov. Romney has some explaining to do about why he suddenly and dramatically changed his position on this issue,' Patrick Sammon, the president of the Log Cabin Republicans, tells ABC News. 'It really raises the question about whether you can trust Mitt Romney. Whether the issue is guns, gays, abortion, or other issues, his views seem to be constantly shifting and changing.'" (Teddy Davis, "Romney Draws Fire For Shift On Gay Rights," ABC News' Political Radar [Blog](#), 4/23/07)

In 1994, Romney Called "Don't Ask, Don't Tell" Policy First Step Toward Having Gays And Lesbians "Able To Serve Openly And Honestly In Our Nation's Military." "One issue I want to clarify concerns President Clinton's 'don't ask, don't tell, don't pursue' military policy. I believe that the Clinton compromise was a step in the right direction. I am also convinced that it is the first in a number of steps that will ultimately lead to gays and lesbians being able to serve openly and honestly in our nation's military." (Mitt Romney, Letter To Log Cabin Republicans Of Massachusetts, 10/6/94)

Romney Now Opposes Gays Serving Openly In The Military. "[Romney] called President Bill Clinton's 'don't ask, don't tell' military policy 'the first of a number of steps that will ultimately lead to gays and lesbians being able

to serve openly and honestly in our nation's military.' Romney has since backed away ... from his previously expansive position on gay people in the military. On that issue, he told National Review Online, he now defers to military leaders." (Dan Balz and Shailagh Murray, "Mass. Governor's Rightward Shift Raises Questions," *The Washington Post*, 12/21/06)

Romney Says He Would "Trust The Counsel Of Those In Uniform." "As for military policy and the 'don't ask, don't tell' policy, I trust the counsel of those in uniform who have set these policies over a dozen years ago. I agree with President Bush's decision to maintain this policy and I would do the same." ("A Primary Factor," *National Review Online*, 12/14/06)

Romney Has Expressed Past Support For Civil Union-Like Benefits For Gay Couples

In 2005, Log Cabin Republicans Asked: "What Happened To The Mitt Romney Who Ran For Governor Supporting ... Civil Union-Like Benefits For Gay Couples?" "The Log Cabin Republicans, a national gay advocacy group, said the Romney who preached tolerance during the 2002 gubernatorial campaign is fading from view. 'What happened to the Mitt Romney who ran for governor supporting employment non-discrimination, hate crimes legislation, domestic partnerships, and civil union-like benefits for gay couples?' said Log Cabin Massachusetts president Ken Sanchez." (Steve LeBlanc, "Massachusetts' Romney Is The Latest Republican Governor With A Wandering Political Eye," *The Associated Press*, 3/3/05)

- **Roll Call's Mort Kondracke:** "[Romney] pretty clearly was in favor of something like Vermont-style civil unions, which he now denies that he was in favor." (Fox News' "Special Report," 12/13/06)

In 2003, Washington Times Reported Romney "Would Support A Vermont-Style Civil Union Law In Massachusetts." "Massachusetts Gov. Mitt Romney said yesterday he was ready to work with lawmakers to craft a 'civil union'-style law to give some marriage rights to homosexual couples, even though he also supports a constitutional amendment to preserve traditional marriage. ... Mr. Romney yesterday told TV news stations that he would support a Vermont-style civil union law in Massachusetts..." (Cheryl Wetzstein, "Romney Pursues Law On Gay Unions," *The Washington Times*, 11/20/03)

2003: Romney Said Health Coverage Benefits And Hospital Visitation Rights Should Be Provided To Gay Couples. "The governor denounced the court ruling and came out strongly against gay marriage, promising to support the Defense of Marriage Act ... He repeated his position yesterday to a far wider audience on NBC's 'Today' and ABC's 'Good Morning America.' ... A few hours later, Romney seemed to modify his position, telling reporters that he believes the court would allow some version of civil unions to be approved instead of outright gay marriage. He has not provided a full list of what rights and benefits he believes the civil unions should carry with them, but has said health coverage and hospital visitation rights should be included." (Rick Klein, "Image On The Line, Romney Treads Carefully," *The Boston Globe*, 11/20/03)

In 2002, Romney Promised To Make Gay Partnership Benefits "Hallmark Of My Leadership As Governor." "Romney, who opposes both civil unions and gay marriage, said he will make domestic partner benefits a 'hallmark of my leadership as governor.'" (Stephanie Ebbert, "Romney: Religion Should Not Be Campaign Issue," *The Boston Globe*, 10/18/02)

- **"Republican Mitt Romney Opposes Civil Unions, But Supports Domestic Partnership Laws That Would Give Gay Couples Access To Health Benefits And Survivorship Rights."** (Joanna Weiss, "Reich Supports Gay Right To Marry," *The Boston Globe*, 6/22/02)

Fox News' Carl Cameron, Circa 2002: Romney Supports Civil Unions. CAMERON: "[Shannon] O'Brien, the state treasurer, also says she is personally opposed to gay marriage and will instead push to legalize so-called civil unions, which are now only recognized in neighboring Vermont. The Republican candidate also supports civil unions, but billionaire businessman Mitt Romney, chief of the last Winter Olympics, says O'Brien wants it both ways." (Fox News' "Special Report," 10/16/02)

Romney Indicated Support For Gay Couples Raising Children – Calling It Example Of "The American Way" – But Two Years Ago Expressed Horror That "Some Are Actually Having Children Born To Them"

June 2007: When Confronted By Frustrated Gay Parent Over His Opposition To Gay Marriage, Romney Told Her He Was "Delighted That You Have A Family ... That's The American Way," Adding "I Welcome That." "A New Hampshire woman, frustrated with Republican presidential hopeful Mitt Romney's opposition to gay marriage, made a point Wednesday of telling him about her personal experience. ... Romney paused, asked [gay parent Cynthia] Fish about her children and then praised her. 'Wonderful,' Romney said. 'I'm delighted that

you have a family and you're happy with your family. That's the American way. ... People can live their lives as they choose and children can be a great source of joy, as you know. And I welcome that.” (“N.H. Woman Challenges Romney On Gay Marriage,” *The Associated Press*, 6/6/07)

- **Romney Said Scenario Such As “Gay Couples Raising Kids” Was “The American Way, To Have People Have Their Freedom Of Choice.”** “The former Massachusetts governor acknowledged other scenarios that raise children. ‘There are other ways to raise kids that’s fine: single moms, grandparents raising kids, gay couples raising kids. That’s the American way, to have people have their freedom of choice,’ he said.” (“N.H. Woman Challenges Romney On Gay Marriage,” *The Associated Press*, 6/6/07)
- **Romney Previously Expressed Support For Gay Parental Rights In June 2005.** ROMNEY: “There will be children born to same-sex couples, and adopted by same-sex couples, and I believe that there should be rights and privileges associated with those unions and with the children that are part of those unions.” (Mitt Romney, Press Conference, 6/15/05)

But In February 2005, Romney Railed Against Gay Parents In Speech To SC Republican Audience, Saying “Some Are Actually Having Children Born To Them ... It’s Not Right On Paper. It’s Not Right In Fact.” “On gay marriage, Romney vilified the Supreme Judicial Court for striking ‘a blow against the family.’ ‘Today, same-sex couples are marrying under the law in Massachusetts,’ Romney said, stressing the word ‘marrying.’ ‘Some are actually having children born to them.’ To thunderous applause from the Spartanburg Republican audience, he said, ‘It’s not right on paper. It’s not right in fact. Every child has the right to have a mother and a father.’” (David Guarino, “Mitt’s Gay-Wed Stance Hits Carolina Chord,” *Boston Herald*, 2/22/05)

-  **Romney In South Carolina, Circa February 2005:** “Today same-sex couples are marrying under the law in Massachusetts. Some are actually having children born to them. We’ve been asked to change their birth certificates to remove the phrase mother and father and replace it with parent A and parent B. It’s not right on paper. It’s not right in fact.” (ABC’s “This Week,” 2/18/07)
- **National Journal:** “[Romney] has used the specter of gay parents to play up to conservative audiences.” (Marc Ambinder, “Journey To The Right,” *National Journal*, 2/10/07)

February 2007: Romney Would Not Answer Question On Whether Or Not He Supported Gay Adoption. ABC’s GEORGE STEPHANOPOULOS: “[I]n 2005 in South Carolina you actually seemed to mock the idea of gays and lesbians adopting and bearing children. ... Are you for [gay adoption]?” ROMNEY: [T]here are gay couples that are having – that are having children of their own. And that’s – obviously, that’s their right. But my belief is that the ideal setting for a child is where there’s a mom and dad.” (ABC’s “This Week,” 2/18/07)

Romney Has Said In Past He Would Attend Gay Marriages Himself If Invited

In 2004, Romney “Said He Would Attend Gay Weddings If Invited.” “Even so, there wasn’t much opponents could do to stop this week’s weddings. Gov. Mitt Romney – a Republican who leans conservative on social issues, even in this most Democratic of states – fought the November court decision approving same-sex marriages. He then pushed for a constitutional amendment to ban them. ... A weary Romney seemed resigned to the inevitable last week: he said he would attend gay weddings if invited.” (Debra Rosenberg, “The ‘Will & Grace’ Effect,” *Newsweek*, 5/24/04)

Romney Claims To Find Discrimination Against Gays “Offensive” But Reportedly Called Homosexuality “Perverse” At Church Gathering Prior To His 1994 Senate Race

In 1994, Romney “Went Out Of His Way” To Court Homosexual Community. “One group [Romney] went out of his way to court [in 1994] was the gay rights community. While he noted that he opposed same-sex marriage, Romney said that ‘certain benefits and privileges should be offered to gay couples and lesbian couples.’ Acknowledging that Kennedy had a strong record on sexual-orientation issues, Romney said his GOP identity gave his words extra weight. ... He said he would push gay rights issues if elected. ‘I think the gay community needs more support from the Republican Party, and I would be a voice in the Republican Party to foster anti-discrimination efforts,’ he said then.” (Dan Balz and Shailagh Murray, “Mass. Governor’s Rightward Shift Raises Questions,” *The Washington Post*, 12/21/06)

- **Romney Claimed He’d Have Been More Effective On Gay Rights Than Ted Kennedy.** “Twelve years ago, Romney boasted that he would be more effective in fighting discrimination against gay men and lesbians than

Sen. Edward M. Kennedy (D-Mass.)... " (Dan Balz and Shailagh Murray, "Mass. Governor's Rightward Shift Raises Questions," *The Washington Post*, 12/21/06)

- **Romney: "As We Seek To Establish Full Equality For America's Gay And Lesbian Citizens, I Will Provide More Effective Leadership Than My Opponent."** (W. Mitt Romney, Letter To Log Cabin Club Of Massachusetts, 10/6/94)

In 1999, Romney Said "Any Discrimination Against Homosexuals ... I Find Offensive And Should Be Eradicated." "Regardless of how I think about my own personal and moral decision and my religion, I completely endorse the right of others to make their choices and to be entitled to equal protection under the law ... Any discrimination against homosexuals, for instance, I find offensive and it should be eradicated. I do not, however, favor same sex marriages." (Glen Warchol, "This Is The Place, But Politics May Lead Romneys Elsewhere," *The Salt Lake Tribune*, 2/14/99)

In November 1993, Romney Allegedly Called Homosexuality "Perverse" During Church Gathering. "Speaking last fall to a Mormon Church gathering, Mitt Romney, then on the verge of launching a bid for a US Senate seat, expressed dismay at reports of homosexual behavior in the group and denounced homosexuality as 'perverse,' according to several people present at the meeting. Romney's alleged comments on homosexual practices were part of a 20-minute address he delivered on November 14 to the Cambridge University Ward, which numbers about 250 to 300 single Mormons." (Scot Lehigh and Frank Phillips, "Romney Allegedly Faulted Gays In Talk To Mormons," *The Boston Globe*, 7/15/94)

- **Romney Admitted Calling Homosexuality "Wrong" But Denied Calling It "Perverse."** "The GOP candidate said in an interview on Wednesday that he was merely emphasizing church teachings that any sex outside of marriage is immoral. 'I specifically said they should avoid homosexuality and they should avoid heterosexual relations outside of marriage,' Romney said. 'I did not use the words perverse or perversion. I just said it was wrong. . . . That is what my church believes.'" (Scot Lehigh and Frank Phillips, "Romney Allegedly Faulted Gays In Talk To Mormons," *The Boston Globe*, 7/15/94)

In 1994, Romney Endorsed Gays In The Boy Scouts – In 2002, An Aide Said Romney Favored Letting Local Troops And Councils Decide The Issue For Themselves

Romney Reprimanded By Boy Scouts Of America For Endorsing Gays In Scouts. "Romney came in for some fire of his own, not from the Kennedy camp but from an organization on whose executive board he sits – the Boy Scouts of America. A Boy Scout spokesman said the Republican candidate may have run afoul of the group's strict rule that board members support Boy Scout policies, including its ban on homosexuals." (Peter G. Gosselin, "Kennedy, Romney Continue Trading Charges Over Facts," *The Boston Globe*, 10/27/94)

-  **Romney:** "I feel that all people should be allowed to participate in the Boy Scouts regardless of their sexual orientation." (Mitt Romney, U.S. Senate Candidates Debate, Boston, MA, 10/25/94)

Boy Scouts Spokesman: Romney Statement Not "Consistent" With Group's Policy. "Asked about the policy in Tuesday's debate, Romney said, 'I support the right of the Boy Scouts of America to decide what it wants to do on that issue.' But he then added, 'I feel that all people should be allowed to participate in the Boy Scouts regardless of their sexual orientation.' 'From where I'm sitting, that doesn't appear to be a consistent statement,' said Richard Walker, the Boy Scouts' national spokesman. 'His second statement seems to be inconsistent with our policy and as a member of the executive board he is expected to support our policy.'" (Peter G. Gosselin, "Kennedy, Romney Continue Trading Charges Over Facts," *The Boston Globe*, 10/27/94)

In 2002, Romney Aide Said Romney Had Let His "Views Be Known" On The Issue, Saying Romney Believed Local Troops Should Make Their Own Decisions On Allowing Gays. "Romney, who has said he opposes the Boy Scouts' policy of exclusion, has sat on the 71-member national executive board since 1993. His spokesman, Eric Fehrstrom, said he has let his 'views be known,' but would not detail how he did so. ... Fehrstrom said that Romney has made his opposition clear. 'The Boy Scouts of America are well aware of Mitt's position that local troops and councils should make their own decisions,' he said. He said Boy Scout officials could look to statements Romney made on the campaign trail in 1994, when he challenged US Senator Edward M. Kennedy." (Stephanie Ebbert, "On Boards, Silence On Gay Concerns," *The Boston Globe*, 10/18/02)

Romney Has Backed Hate Crimes Legislation That Included Sexual Orientation

In 2002, Romney Supported Hate Crimes Legislation Including Sexual Orientation Provision. “On gay rights, Romney supports hate crimes legislation which provides added penalties for crimes committed against a person because of their sexual orientation, race or religion. He does not support gay marriage, but believes health and other workplace benefits should be extended to domestic partners, [Romney aide Eric] Fehrstrom said.” (Erik Arvidson, “Romney’s Running Mate Could Leave Him In Tight Spot,” *Lowell Sun*, 3/30/02)

Massachusetts Log Cabin Republicans’ Ken Sanchez, In 2005: “What happened to the Mitt Romney who ran for governor supporting employment non-discrimination, hate crimes legislation...” (Steve LeBlanc, “Massachusetts’ Romney Is The Latest Republican Governor With A Wandering Political Eye,” *The Associated Press*, 3/3/05)

SECOND AMENDMENT ISSUES

In 1994 Senate Race, Romney Backed Brady Bill And Assault Weapons Ban, Saying “I Don’t Line Up With The NRA”

In 1994, Romney Backed Brady Bill. “[Romney] said he will take stands that put him at odds with some traditional ultra-conservative groups, and cited his support for the assault rifle ban and the Brady gun control law. ‘That’s not going to make me the hero of the NRA,’ he said. ‘I don’t line up with a lot of special interest groups.’” (Andrew Miga, “Mitt Rejects Right-Wing Aid,” *Boston Herald*, 9/23/94)

- **Romney, In 1994: “I Don’t Line Up With The NRA.”** (Scott Helman, “Romney Retreats On Gun Control,” *The Boston Globe*, 1/14/07)

Romney Called Clinton Crime Bill “A Big Step Forward.” “Correction: Because of a reporting error, a story in yesterday’s Metro/Region section about the taping of a debate between Republican gubernatorial candidates incorrectly attributed to John Lakian a quote about the federal crime bill. It was Mitt Romney who said: ‘This legislation isn’t perfect. But if we think we’re going to go to Washington and only vote for things that are perfect, I think we’d be making a big mistake. This bill is a big step forward.’” (“Correction,” *The Boston Globe*, 8/28/94)

- **“Romney Said He Supports The Ban On 19 Assault Weapons Included In The Bill...”** (Scot Lehigh, “Kennedy’s Rivals Say Crime Bill Was Too Weak For Them,” *The Boston Globe*, 8/13/94)

Romney Criticized Republican Opponent, Defended Ted Kennedy’s Support For Crime Bill. “Lakian, who denounced the crime law as ineffective and costly to local communities, criticized Romney’s support for the measure. But Romney countered, ‘There is nothing dishonorable or un-Republican to vote for that just because Ted Kennedy supports it.’” (Scot Lehigh and Frank Phillips, “Romney, Lakian Debate Crime, Tax And Abortion,” *The Boston Globe*, 9/7/94)

- **Romney Later Blamed Kennedy For Watering Down A “Perfectly Good Bill.”** “Mitt Romney charged that Kennedy had helped water down a tough [crime] bill to the point where it should not have been passed. ‘I think the House did the right thing in saying, “Let’s fix this bill,”’ Romney said of the House’s 225-210 decision not to bring the \$33 billion conference committee bill to the floor for a vote. ... Romney blamed Kennedy for what he saw as flaws in the bill. ‘What was a perfectly good bill when it came out of the Senate was taken into the conference committee and, behind closed doors, Ted Kennedy made some big mistakes,’ Romney said.” (Scot Lehigh, “Kennedy’s Rivals Say Crime Bill Was Too Weak For Them,” *The Boston Globe*, 8/13/94)

In 1994, Romney Backed Assault Weapons Ban And Brady Bill, Boasting “That’s Not Going To Make Me The Hero Of The NRA.” “[Romney] said he will take stands that put him at odds with some traditional ultra-conservative groups, and cited his support for the assault rifle ban and the Brady gun control law. ‘That’s not going to make me the hero of the NRA,’ he said. ‘I don’t line up with a lot of special interest groups.’” (Andrew Miga, “Mitt Rejects Right-Wing Aid,” *Boston Herald*, 9/23/94)

- **Romney In 1994: 5-Day Waiting Period Won’t Have “Massive Effect On Crime But ... Will Have A Positive Effect.”** “The candidate reiterated his support for an assault weapons ban contained in Congress’ crime bill, and the Brady law which imposes a five-day waiting period on handgun purchases. ‘I don’t think (the waiting period) will have a massive effect on crime but I think it will have a positive effect,’ Romney said.” (Joe Battenfeld, “Herald Panel Grills Romney On Crime,” *Boston Herald*, 8/1/94)

As Governor, Romney Quadrupled Gun Licensing Fees And Vowed Not To “Chip Away” At Tough Gun Laws

 **Romney, In 2002: “We Do Have Tough Gun Laws In Massachusetts. I Support Them. I Won’t Chip Away At Them. I Believe They Help Protect Us And Provide For Our Safety.”** (Gubernatorial Candidates Debate, Springfield, MA, 9/24/02)

-  [Watch Video](#): Romney Voices Support For Massachusetts’ “Tough” Gun Control Laws.

Romney Raised Gun Licensing Fee By 400 Percent. “Gun owners [are] upset that the cash-strapped Legislature and Romney administration raised the [firearms license] renewal fee from \$25 to \$100 in this year’s budget.” (Lane Lambert, “Gun Permit Renewal Delays Frequent,” *The Patriot Ledger* [Quincy, MA], 9/17/03)

Gun Owners Action League’s James Wallace Called Romney’s Action A Tax On All Gun Owners. “James Wallace, spokesman for the Gun Owners Action League, said his organization considers the state firearm registration fee – which Romney proposes raising ... to be a tax on the 200,000 state residents who hold firearm identification cards.” (Joanna Weiss, “Romney Proposals On Fees Draw Fire,” *The Boston Globe*, 2/28/03)

- **Wallace:** “It’s a tax on an individual’s right to bear arms in Massachusetts ... Basically, we’re being robbed.” (Ken Maguire, “Governor Says Proposed New, Higher Fees Are Not Taxes,” *The Associated Press*, 2/27/03)

In 2004, Romney Signed Permanent State-Level Ban On Assault Weapons

Romney Signed State-Level Assault Weapons Ban That Was Mirrored After Federal Assault Weapons Ban. “[P]erhaps the most significant gun legislation Romney signed as governor was a 2004 measure instituting a permanent ban on assault weapons. The Legislature mirrored the law after the federal assault weapons ban, which was set to expire. According to activists at the time, the bill made Massachusetts the first state to enact its own such ban, and Romney hailed the move. ... [T]he NRA and many local affiliates do not support assault weapons bans, arguing that the arms are rarely used in crimes and have a legitimate purpose in hunting, target shooting, and self-protection.” (Scott Helman, “Romney Retreats On Gun Control,” *The Boston Globe*, 1/14/07)

- **Romney:** “These guns are not made for recreation or self-defense ... They are instruments of destruction with the sole purpose of hunting down and killing people.” (Scott Helman, “Romney Retreats On Gun Control,” *The Boston Globe*, 1/14/07)

Gun Owners Of America’s Erich Pratt: Romney’s Assault Weapons Ban Was “Draconian.” “[Romney] signed a draconian ban on common, household firearms that are owned by millions of americans across the nation.” (Erich Pratt, “Will The Real Romney Please Stand Up?” *Human Events* Online, www.humanevents.com, 1/22/07)

In April 2007, Romney Said He Would “Consider” Supporting Renewal Of Federal Assault Weapons Ban. TOWNHALL.COM’s MARY KATHERINE HAM: “[Y]ou supported an assault weapons ban in Massachusetts. This [Virginia Tech] tragedy is being used to push the renewal of the federal assault weapons ban. What would your stance be if that comes up again?” ROMNEY: “Well, you know, the weapon used here was not an assault weapon, so I’m not sure what the relevance is. ... You know, if there’s a weapon that puts our police at risk, like machine guns, of course, then that’s something I would, of course, consider.” (Mary Katherine Ham, “Townhall.com Sits Down With Gov. Romney,” *TownHall.com* [Blog](#), 4/20/07)

Romney’s 2003 Proposal To Divert Hunting Fees To General Fund Angered Hunters, Jeopardized Federal Aid

Hunters Banded Together To Oppose Romney Proposal To Divert Fees From Wildlife To General Fund. Men and women who hunt and fish in the region are banding together to oppose a proposal by Governor Mitt Romney to use money raised by hunting and fishing licenses for the state’s general fund. Historically, the money raised by sporting fees - what amounts to more than \$8 million each year statewide - is deposited into a fund dedicated to preserving wildlife. ... Romney, however, has proposed a budget for 2004 that calls for the environmental money to be consolidated into the general fund to reduce the deficit.” (Trudy Tynan, “Proposal To Divert Hunting And Fishing License Fees Could Prove Costly,” *The Associated Press*, 2/4/03)

- **League Of Essex County Sportsmen’s Club’s Tom Walsh:** “This money is being raised by us, not the general taxpayers. It’s a lot of money, money we raise. It should be going right back into wildlife.” (Trudy Tynan, “Proposal To Divert Hunting And Fishing License Fees Could Prove Costly,” *The Associated Press*, 2/4/03)

Romney Proposal Jeopardized Federal Aid For Wildlife. “A proposal by Gov. Mitt Romney to divert more than \$1.3 million in hunting and fishing license fees and federal wildlife funds into the cash-strapped state’s general

fund could cost Massachusetts millions of dollars in federal aid, U.S. wildlife officials said.” (Trudy Tynan, “Proposal To Divert Hunting And Fishing License Fees Could Prove Costly,” *The Associated Press*, 2/4/03)

Federal Aid Requires State License Fees To Be Used Solely For Fish And Wildlife Agency. “The federal money comes from the state’s share of federal excise taxes on guns, fishing tackle and motorboat fuels ... Under the programs, which date back to the 1930s, states must agree to use hunting and fishing license revenue solely for their fish and wildlife agency ... States are also prohibited from using the lands acquired for wildlife protection for other purposes...” (Trudy Tynan, “Proposal To Divert Hunting And Fishing License Fees Could Prove Costly,” *The Associated Press*, 2/4/03)

In January 2006, Romney Said He Owned A Gun, Then Two Days Later Admitted He Did Not

Romney Told Conservative “Glenn And Helen” Show That He Owned A Gun. “I have a gun of my own, I go hunting myself...” (Glenn And Helen Show, www.glennandhelenshow.com, 1/10/07)

- **Romney Appealed To Gun Owners For Support, Claiming To Be One Of Them.** “[Romney said] he hopes states would continue to ease regulations on gun owners, and he expressed enthusiasm for guns and hunting. ‘I have a gun of my own. I go hunting myself. I’m a member of the NRA and believe firmly in the right to bear arms,’ Romney said. ... He now touts his work as governor to ease restrictions on gun owners. He proudly describes himself as a member of the NRA – though his campaign won’t say when he joined.” (Scott Helman, “Romney Retreats On Gun Control,” *The Boston Globe*, 1/14/07)

Two Days Later, Romney Admitted That He Did Not Own A Gun. “On Wednesday, Romney said on an Internet podcast, ‘The Glenn and Helen Show,’ that he hopes states would continue to ease regulations on gun owners, and he expressed enthusiasm for guns and hunting. ‘I have a gun of my own. I go hunting myself. I’m a member of the NRA and believe firmly in the right to bear arms,’ Romney said. Asked by reporters at the gun show Friday whether he personally owned the gun, Romney said he did not. He said one of his sons, Josh, keeps two guns at the family vacation home in Utah, and he uses them ‘from time to time.’” (Scott Helman, “Romney Retreats On Gun Control,” *The Boston Globe*, 1/14/07)

Romney Brags About NRA Membership But Didn’t Join Until August 2006

Romney Bragged About Being Member Of The NRA. “I’m a member of the NRA and believe firmly in the right to bear arms.” (Glenn And Helen Radio Show, www.glennandhelenshow.com, 1/10/07)

Romney Later Revealed He Didn’t Join NRA Until Last August, Just Before Presidential Campaign Began. “Mitt Romney, who has touted his support of gun owners since launching his presidential campaign, yesterday acknowledged he did not become a member of the National Rifle Association until last August, campaign officials said.” (David Abel, “Romney Joined NRA In August,” *The Boston Globe*, 2/19/07)

Romney Declined Comment On Whether Or Not He Still Supports “Tough” Gun Laws

In January 2007, Romney Refused To Say If He Still Supports Gun Control Laws. “Romney says he still backs the ban on assault weapons, but he won’t say whether he stands by the Brady Bill. And after the gun show tour, his campaign declined to say whether he would still describe himself as a supporter of tough gun laws.” (Scott Helman, “Romney Retreats On Gun Control,” *The Boston Globe*, 1/14/07)

Today, Romney Maintains Support For Assault Weapons Ban. “I know the NRA does not support an assault weapon ban, so I don’t line up on that particular issue with the NRA, neither does President Bush. He likewise says he supported an assault weapon ban.” (ABC’s “This Week,” 2/18/07)

 **Romney Says Because Of Instant Background Checks, Brady Bill Not Needed.** “Today we don’t have the Brady Bill because we have instantaneous background checks, that’s no longer an operative or needed measure.” (ABC’s “This Week,” 2/18/07)

ROMNEY’S HUNTING BACKGROUND

In April 2007, Romney Told New Hampshire Audience He’s “Been A Hunter Pretty Much All My Life” And Previously Said He Owned A Gun

 **Romney: “I Purchased A Gun When I Was A Young Man. I’ve Been A Hunter Pretty Much All My Life.”**
(Glen Johnson, “Romney Calls Himself A Longtime Hunter,” *The Associated Press*, 4/5/07)

Romney Has Spoken Of His Hunting Prowess “On Several Occasions.” “The Republican presidential contender has told audiences on several occasions, most recently this week in gun-savvy – and early voting – New Hampshire, that he has been a longtime hunter.” (Glen Johnson, “Romney Calls Himself A Longtime Hunter,” *The Associated Press*, 4/5/07)

Romney Repeatedly Claimed He Owned A Gun And Went Hunting Himself. “[Romney] expressed enthusiasm for guns and hunting. ‘I have a gun of my own. I go hunting myself. I’m a member of the NRA and believe firmly in the right to bear arms,’ Romney said.” (Scott Helman, “Romney Retreats On Gun Control,” *The Boston Globe*, 1/14/07)

- **“I Have A Gun Of My Own, I Go Hunting Myself...”** (Glenn And Helen Radio Show, www.glennandhelenshow.com, 1/10/07)

Romney’s Pro-Gun Campaign Rhetoric Noted By Media. “To hear Mitt Romney talk on the campaign trail, you might think the Republican presidential candidate had a gun rack in the back of his pickup truck.” (Glen Johnson, “Romney Calls Himself A Longtime Hunter,” *The Associated Press*, 4/5/07)

Romney Forced To Admit He Hunted Only Two Times In His Life And Does Not Own A Gun

Romney Later Admitted He Has Been Hunting Only Twice In His Life – Once Nearly Fifty Years Ago, Once At “Fenced Game Preserve” On 2006 Retreat For Political Donors. “[T]he former Massachusetts governor’s hunting experience is limited to two trips at the bookends of his 60 years: as a 15-year-old, when he hunted rabbits with his cousins on a ranch in Idaho, and last year, when he shot quail on a fenced game preserve in Georgia. Last year’s trip was an outing with major donors to the Republican Governors Association, which Romney headed at the time.” (Glen Johnson, “Romney Calls Himself A Longtime Hunter,” *The Associated Press*, 4/5/07)

- **Romney’s Recent Hunting Experience: RGA Quail Hunt In Sea Island, Georgia.** “According to his campaign, Romney spent a summer as a 15-year-old hunting rabbits in Idaho and didn’t hunt again until last year, when he attended a quail hunt in Sea Island, Ga., sponsored by the Republican Governors Association.” (Scott Helman, “Romney’s Record On Guns Questioned,” *The Boston Globe*, 4/5/07)

After Professing He Owned A Gun, Romney Admitted The Gun Was Not His But Maintained He Went Hunting “From Time To Time.” “Asked by reporters at the gun show Friday whether he personally owned the gun, Romney said he did not. He said one of his sons, Josh, keeps two guns at the family vacation home in Utah, and he uses them ‘from time to time.’” (Scott Helman, “Romney Retreats On Gun Control,” *The Boston Globe*, 1/14/07)

- **“Even Romney Acknowledges That The Single Gun In One Of His Homes Isn’t His; It Belongs To His Son.”** (Editorial, “Modified Mitt,” *Lowell Sun*, 2/22/07)
- **“[Romney] Does Not Own A Firearm, Despite Claiming To Earlier This Year.”** (Glen Johnson, “Romney Defends Lack Of Hunting License,” *The Associated Press*, 4/7/07)

Voter Who Asked Initial Question Said Of Romney: “I See Another John Kerry Coming Down The Road”

 **Joe Feuer, Who Asked Romney Initial Question: “I See Another John Kerry Coming Down The Road.”**
FOX 25 BOSTON’S JOE BATTENFELD: “Do you view this as sort of one more, kind of...” JOE FEUER: “Flip flop? Yeah, I see another John Kerry coming down the road.” (Fox 25 News, www.youtube.com, 4/11/07)

-  [Watch](#) Feuer Comment On Romney’s Hunting Remarks.

A Day Later, Romney Revised His Remarks, Saying He’d Hunted “Small Varmints” And “Rodents” More Than Twice

 **Romney Revised His Remarks The Next Day, Saying He Has “Always” Hunted “Rodents” And “Varmints.”** “Republican presidential candidate Mitt Romney is taking a second shot at describing his hunting experience. ... Campaigning in Indianapolis on Thursday, Romney said he has hunted small game since his youth. ‘I’m not a big-game hunter. I’ve made that very clear,’ he said. ‘I’ve always been a rodent and rabbit hunter.

Small varmints, if you will. I began when I was 15 or so and I have hunted those kinds of varmints since then. More than two times.” (Emily Udell, “Romney Aims Again To Explain Hunting,” *The Associated Press*, 4/6/07)

- **Boston Herald’s Brett Arends: “Varmints? Rabbits? Hello, Elmer Fudd.”** “‘I’ve always been a rodent and rabbit hunter. Small varmints if you will,’ the hapless ex-governor said last week following his claim that he had been ‘a hunter all my life.’ Varmints? Rabbits? Hello, Elmer Fudd.” (Brett Arends, Op-Ed, “Mitt Shoots Holes In His Credibility,” *Boston Herald*, 4/11/07)

Romney “Was Not Trying To Mislead Anyone,” Claimed His Aides. “An aide said Wednesday that Romney was not trying to mislead anyone, although he confirmed Romney had been hunting only on those occasions in his life.” (Glen Johnson, “Romney Calls Himself A Longtime Hunter,” *The Associated Press*, 4/5/07)

- **Romney Spokesman Kevin Madden: “I Think This Is Probably A Lot Of Quibbling Over The Term ‘Lifelong.’”** (MSNBC’s “Live News,” 4/5/07)

Lowell Sun Called Romney’s Claim To Have Longtime Passion For Hunting “More Than A Little Weak.” “Romney and his spokesman are working overtime to convince gun enthusiasts the former governor didn’t switch his position just to appeal to gun owners, but it is a tough sell. His argument that he has been a hunter ‘all his life,’ because as a boy working on a ranch in Idaho he shot rabbits that were eating the barley and that he has recently been quail hunting, is more than a little weak.” (Editorial, “Modified Mitt,” *Lowell Sun*, 2/22/07)

Washington Post: Romney’s Hunting Gaffe Serves As Lesson That Money Can’t Buy Authenticity. “There are things in politics that money can’t buy, and chief among them is the quality of authenticity: the ability to convince voters that a candidate is more than the sum of positioning by his or her handlers. Last week, former Massachusetts governor Mitt Romney was the latest to discover that truth.” (Editorial, “Killer Rabbits,” *The Washington Post*, 4/10/07)

- **“Mitt Romney Tried To Look Like A Hunter – And Ended Up Shooting Himself In The Foot.”** (Editorial, “Killer Rabbits,” *The Washington Post*, 4/10/07)

TheHill.com’s Brent Budowsky: “Now Mitt Romney Lies About Hunting.” “Now Mitt Romney lies about hunting. The former Massachusetts governor said he had been a hunter for just about all his life. Almost immediately his staff reminded him he had only been hunting twice. Presumably Mr. Romney forgot about all the times he never hunted.” (Brent Budowsky, “The Republicans’ Pinocchio Problem,” *The Hill’s Pundits Blog*, 4/5/07)

Newsweek: Romney’s “Varmints” Explanation “Sounded Stiff And Lame.” “Romney tried to explain that he had not been a ‘big game’ hunter but rather shot at varmints and smaller game ... But the explanations sounded stiff and lame – one more example of Romney’s trying to pander to true-blue conservatives and getting called out for it.” (Evan Thomas et al, “Is Mitt Romney Ready For Prime-Time Politics?” *Newsweek*, 4/16/07)

Flashback: Romney Admitted Only One Prior Hunting Experience In 2003 Remarks

In Late 2003, Romney Admitted He Had Only Been Hunting Once In His Life. “His only hunting experience was shooting rabbits at a ranch in Idaho with a .22-caliber rifle and he acknowledged he has struggled when he tried fly fishing in the past.” (John J. Monaghan, “Romney OKs Funds For Wildlife Programs,” [Massachusetts] *Telegram & Gazette*, 11/1/03)

No Evidence Exists Romney Has Ever Taken Out A Hunting License

Romney Has Never Procured A Hunting License, According To Officials In Four States Where He Has Lived. “Officials in the four states where Mitt Romney has lived say the Republican presidential contender, who calls himself a lifelong hunter, never took out a license. Romney says that’s because he has seldom hunted where he needed one. ... Hunting certain small game there doesn’t require a license. ... [T]he *Associated Press* asked wildlife officials in Michigan, Massachusetts, New Hampshire and Utah for any documentation verifying Romney had been a registered hunter.” (Glen Johnson, “Romney Defends Lack Of Hunting License,” *The Associated Press*, 4/7/07)

No Record Of Romney License In Michigan, Massachusetts Or New Hampshire – Utah Does Not Allow Access To License Records. “Officials from Michigan, Massachusetts and New Hampshire, where a license is necessary to hunt such small game, said they could not immediately locate any license for Romney. An official in Utah said a change in state law last year blocked public access to license records.” (Glen Johnson, “Romney Defends Lack Of Hunting License,” *The Associated Press*, 4/7/07)

Romney's Handling Of Gun Issue Compared To Similar Efforts By John Kerry In 2004

Associated Press Report: Criticism Of Romney Evokes Echoes Of Kerry. "Critics said it was the latest example of a White House aspirant willing to say anything to reach the Oval Office. ... The charge echoed with similarities to the criticism the Republican National Committee used to level against another Massachusetts politician running for president, Sen. John Kerry, who was his party's 2004 nominee." (Glen Johnson, "Romney Calls Himself A Longtime Hunter," *The Associated Press*, 4/5/07)

- **Eye On 08 Blog: "Mitt Romney Has A Problem With Gun Owners, And It Is That He Is Like John Kerry."** ("Romney On Guns: More Mitt-Representations," Eye On 08 Blog, www.eyeon08.com, 4/4/07)
- **American Spectator's Philip Klein: "This Is Al Gore/John Kerry-Type Stuff, And Completely Unnecessary."** (Philip Klein, "Romney The Rodent Hunter," American Spectator's "AmSpec" [Blog](#), 4/6/07)

Lowell Sun: "Let's Recall That Sen. John Kerry ... Was Pilloried" For Trying To Court Gun Owners With Staged Hunt. "Let's recall that Sen. John Kerry, D-Mass., was pilloried by his political foes, and the media, when he tried to court gun owners by joining a duck hunt – in brand-new camouflage duds. No one believed a guy normally spotted skiing or windsurfing was a hunting enthusiast, and no one should believe Romney is, either." (Editorial, "Modified Mitt," *Lowell Sun*, 2/22/07)

MSNBC's Norah O'Donnell Asked Campaign Adviser If Romney's Hunting Remarks Could Be Compared To John Kerry's Duck Hunt From 2004. O'DONNELL: "[Y]ou may recall the 2004 presidential race. John Kerry was widely ridiculed when there was video of him on a hunting trip and after that came this tide of criticism, painting Kerry as this flip flopper, like, 'Look at him out there, he's trying to prove he is a huntsman and he's not.' Are you concerned that Romney could get portrayed as a flip flopper in the same sort of way?" (MSNBC's "Live News," 4/5/07)

Boston Globe Columnist Compared Romney's Gaffe With Kerry's "Can I Get Me A Hunting License" Comment. "Of course, Romney is not alone when it comes to trying to woo the hunting crowd. During the 2004 campaign, John Kerry asked store owners in Ohio, 'Can I get me a hunting license here?' He was further lampooned after he emerged from a cornfield, wearing a camouflage jacket and holding a dead goose. But Kerry actually owns guns." (Joan Vennochi, Op-Ed, "Guns, Trust, And Romney," *The Boston Globe*, 4/8/07)

- **Globe Columnist: "Leave It To Mitt Romney To Shoot Himself In The Foot With A Gun He Doesn't Own."** (Joan Vennochi, Op-Ed, "Guns, Trust, And Romney," *The Boston Globe*, 4/8/07)

Boston Herald Drew Parallels Between Romney's "Pandering" To Gun Owners And Kerry's '04 Efforts. "Why pandering to the National Rifle Association requires actually invoking some kind of hunting expertise is still a mystery. There are no real rules about pandering, after all. And if Romney doesn't believe that, there's a once-used L.L. Bean hunting outfit John Kerry might lend him." (Editorial, "Let The 'Varmint' Hunt Begin," *Boston Herald*, 4/7/07)

Washington Post's Dana Milbank: "He's Getting A Little Bit Of A Kerry Problem." "He doesn't call them small animals, he calls them varmints. It sounds like Yosemite Sam here... 'Say your prayers, varmints.' Does it recall or bring to mind something that happened about this time in the 2004 cycle with John Kerry and his hunting? It's curious that these two from Massachusetts seem to have this sort of 'I voted for the \$87 billion before I voted against it' problem going on here, just as Mitt Romney is rising to prominence in the Republican field, he's getting a little bit of a Kerry problem." (MSNBC's "Countdown," 4/9/07)

Romney Joined NRA For Blatantly Political Reasons Months Before Forming Presidential Exploratory Committee

Romney Explains He Signed Up For Lifetime NRA Membership In August 2006 Because "I'm After The NRA's Endorsement. ... If I'm Going To Ask For Their Endorsement, They're Going To Ask For Mine." "Expressing familiarity with and support for gun rights is key among Republican presidential contenders ... It helps explain why Romney joined the NRA last August, signing up not just as a supporter but a designated 'Lifetime' member ... Romney told a Derry, N.H., audience, 'I'm after the NRA's endorsement. I'm not sure they'll give it to me. I hope they will. I also joined because if I'm going to ask for their endorsement, they're going to ask for mine.'" (Glen Johnson, "Romney Calls Himself A Longtime Hunter," *The Associated Press*, 4/5/07)

AFFIRMATIVE ACTION

Romney Once Advocated That Public Companies And Government Agencies Be Required To List Women And Minority Employees By Salary Level To Identify And “Break Through” Glass Ceiling

In 1994, Romney Wanted Companies To Report Numbers Of Women And Minorities Hired In Order To “Break Through” The Glass Ceiling. “Asked about affirmative action and discrimination, Romney said that there definitely was a ‘glass ceiling’ holding back women and minorities and that ‘I believe that public companies and federal agencies should be required to report in their annual 10K the number of minorities and women by income group within the company so we can identify where the glass ceiling is and break through it.’” (Jonathan Last, “Romney: Seriously Great, But With Baggage,” *The Philadelphia Inquirer*, 1/21/07)

- **Romney’s Bain & Co. And Bain Capital Did Not Have Affirmative Action Programs.** “Romney acknowledged that Bain & Co. and Bain Capital do not have affirmative action programs or an organized outreach to minorities and women. He said the Bain consulting firm in particular recruited from the elite business schools, which, he said, graduate only a handful of minorities and women.” (Frank Phillips, “Romney Is Yet To Be Tested In Politics,” *The Boston Globe*, 5/9/04)

As Governor, Romney Issued Executive Order Expanding But Renaming State Office Of Affirmative Action, Which Critics Claimed Effectively Watered Down The Office’s Mission

In 2003, Romney Issued Executive Order Renaming Office Of Affirmative Action And “Broadening Its Mission To Include The Creation Of A Work Force Reflective Of Massachusetts’ Demographics.” “Gov. Mitt Romney issued an executive order Tuesday expanding the state Office of Affirmative Action and broadening its mission to include the creation of a work force reflective of Massachusetts’ demographics and ‘responsive to the Commonwealth’s citizens.’ The renamed Office of Diversity and Equal Opportunity will be charged with creating a workplace ‘that welcomes, respects and values people of abilities, cultures, nationalities, religions, races, genders, sexual orientations, ethnic background and veteran’s status.’” (“Governor Creates New Office To Improve Work Force Diversity,” *The Associated Press*, 6/17/03)

- **Romney:** “My administration is committed to assembling a state government workforce that reflects the fabric of our community ... We will work hard to ensure that our administration recruits and retains talented individuals for all backgrounds at every level of government.” (“Governor Creates New Office To Improve Work Force Diversity,” *The Associated Press*, 6/17/03)
- **Romney Executive Order:** “Whereas securing diversity, non-discrimination and equal opportunity shall be the policy of the Executive Branch of the Commonwealth of Massachusetts in all of its decisions, programs and activities...” (Gov. Mitt Romney, “Governor’s Diversity And Equal Opportunity Initiative,” [Executive Order](#))
- **Romney Executive Order:** “Whereas, the Executive Branch of State Government recognizes the importance of Affirmative Action, equal opportunity and diversity in State employment and State business...” (Gov. Mitt Romney, “Governor’s Diversity And Equal Opportunity Initiative,” [Executive Order](#))

Romney Executive Order Eliminated Office Of Affirmative Action And Created Office Of Diversity And Equal Opportunity. “Romney’s executive order eliminates the state’s Office of Affirmative Action, putting its functions in a newly created Office of Diversity and Equal Opportunity. He said in a statement released in June that the move was aimed at broadening the mission of the state’s outreach efforts.” (Rick Klein and Yvonne Abraham, “Affirmative Action System Overhauled,” *The Boston Globe*, 8/28/03)

After Criticism, Romney “Promised To Reinstate Elements Of The State’s Longstanding Diversity Policies.” “Seeking to quell harsh criticisms of his affirmative action overhaul, Governor Mitt Romney yesterday promised to reinstate elements of the state’s longstanding diversity policies that he effectively eliminated by executive order earlier this summer. Romney, in his first public comments on the executive order he signed two months ago, said he never intended to water down the affirmative action guidelines, some of which were established 20 years ago by then-governor Michael S. Dukakis.” (Yvonne Abraham, “Romney Says He Will Alter Diversity Plan,” *The Boston Globe*, 8/29/03)

- **Romney Spokesperson Nicole St. Peter:** “The governor has had a strong commitment to affirmative action.” (Yawu Miller, “Coalition Calls For Changes To Romney Affirmative Action Plan,” *Bay State Banner*, 7/1/04)

Romney: We’re Trying To Increase “The Number And The Percentage Of People From All Backgrounds And Ethnic Heritages In State Government.” ROMNEY: “If there’s anything in the regulation which was issued

that needs to be amended with old language from the prior regulations, we're happy to do that ... There's nothing we're trying to eliminate. We're only trying to build upon what's been done in the past with a new, more effective effort in increasing the number and the percentage of people from all backgrounds and ethnic heritages in state government." (Yvonne Abraham, "Romney Says He Will Alter Diversity Plan," *The Boston Globe*, 8/29/03)

Romney Executive Order Eliminated Punitive Measures For Failure To Follow Laws, Ended Role Of Massachusetts Commission Against Discrimination In Disputes. "Romney's order nullified earlier governor's orders calling for punitive measures, such as hiring freezes and closer supervision, against state departments that do not use hiring practices consistent with the goals of affirmative action. It eliminated the explicit role of the Massachusetts Commission Against Discrimination in state employee hiring disputes. It also replaced the state Office of Affirmative Action with a new Office of Diversity and Equal Opportunity." (Yvonne Abraham, "Romney Says He Will Alter Diversity Plan," *The Boston Globe*, 8/29/03)

Romney Order "Superseded" Dozens Of Other Affirmative Action Regulations. "The Romney order also revoked requirements that departments provide ongoing diversity training programs. His order includes no discussion of how affirmative action must be applied in the awarding of contracts by the state; it revoked a requirement that all private health care facilities licensed by the state comply with nondiscrimination policies in patient admissions. Dozens of other affirmative action regulations were also superseded." (Yvonne Abraham, "Romney Says He Will Alter Diversity Plan," *The Boston Globe*, 8/29/03)

Romney: "I Welcome The Opportunity To Recommit The Commonwealth To Affirmative Action And The Bedrock Principles Of Fairness And Equality." "As governor, I welcome the opportunity to recommit the commonwealth to affirmative action and the bedrock principles of fairness and equality. With these principles as our guide, the promise of Massachusetts will remain unlimited for years to come for all of our citizens. If genuine diversity and equality are to thrive in the executive branch, it will be because the right climate has been created. We want to move beyond simply valuing diversity to understanding that diversity is valuable." (Howard Manly, Op-Ed, "To Mitt, 'Minority' Means Republican," *Boston Herald*, 6/1/04)

Romney Campaign Claims He Now Opposes "Quotas And Preferences"

In May 2007, Romney's Campaign Said He Did Not "Support Quotas Or Preferences." "Most recently, in Michigan in 2006, Connerly set out to prove the Supreme Court 'got it wrong' in 2003 when it upheld the constitutionality of the University of Michigan Law School's use of race 'as one of many factors' to achieve student diversity. ... Former Massachusetts governor Mitt Romney has not spoken publicly on the Michigan initiative, but his campaign says he 'does not support quotas or preferences.'" (Jennifer Rubin, "Propositioning The States," *The Weekly Standard*, 5/7/07)

JUDICIAL ISSUES

Romney Selected From Pool Of Nominees Forwarded To Him By Nonpartisan Judicial Nominating Commission, After Which Governor's Council Voted Nominee Up Or Down

State's Nonpartisan Judicial Nominating Commission – Reformed And Centralized By Romney Himself – Forwarded Romney Resumes From Which To Select Nominees. "Romney won praise in the legal community when he replaced regional judicial nominating committees that were viewed as politically tainted with a centralized Judicial Nominating Commission. The commission considers applicants using a 'blind' first phase of the selection process that removes names from applications in an attempt to ensure the candidates will be judged on their merits." (Raphael Lewis, "Romney Jurist Picks Not Tilted To GOP," *The Boston Globe*, 7/25/05)

Nominees' Qualifications Also Rated By Joint Bar Committee. "[A]ll of Romney's nominees have been submitted to a Joint Bar Committee on Judicial Nominations, which rates candidates as qualified, well-qualified, or unqualified and each has been found to be either qualified or well-qualified." (Raphael Lewis, "Romney Jurist Picks Not Tilted To GOP," *The Boston Globe*, 7/25/05)

After Romney Picked Nominee, Candidate Needed Approval From Democrat-Dominated Governor's Council. "After Romney nominates the candidate, the pick must be approved by the Governor's Council, where Democrats hold eight of nine seats." (Raphael Lewis, "Romney Jurist Picks Not Tilted To GOP," *The Boston Globe*, 7/25/05)

Romney Issued Executive Order Designed To Combat Patronage – Then Later Waived It

Romney Waived His Own Executive Order To Appoint Unapproved Judge. "Gov. Mitt Romney has named a lawyer to the Juvenile Court without approval from the current Judicial Nominating Commission, bypassing a complex system that was designed to combat patronage and favoritism in judicial picks...Romney nominated Springfield attorney Henry L. Rigali for a seat on the Hampden County Juvenile Court, waiving a provision in his own Executive Order 466 that would have required Rigali's approval by the JNC within the last 18 months in order for the nomination to be allowed." (Melissa A. Murphy, "MA Governor Bypasses Selection Process With Judicial Pick," *Massachusetts Lawyers Weekly*, 8/1/05)

Romney Issued Executive Order Late In Term To Restrict Role Of Judicial Nominating Commission

Romney "Seized Control Of The Way Judges Are Nominated" And Weakened Power Of 35-Year-Old Non-Political Panel As He Prepared To Run For President. "With an abundance of judicial vacancies likely this year, Governor Mitt Romney has seized control of the way judges are nominated in Massachusetts, weakening a 35-year-old panel intended to evaluate candidates without regard to politics. In a series of executive actions, Romney has stripped the Judicial Nominating Commission, a panel of 21 lawyers, of its long-held power to evaluate candidates' fitness for the bench, restricting their role to a cursory review of educational and professional experience. The changes strengthen Romney's ability to put his own stamp on the state's judiciary, as he prepares a possible run for president in 2008." (Michael Levenson, "Romney Curtails Judicial Vacancy Panel," *The Boston Globe*, 4/9/06)

- **Romney's Action Was Reversal Of Pledge For "Squeaky Clean" Nominating Process.** "Romney's actions have stunned lawyers and judges in Massachusetts because the governor made a point of elevating the role of the Judicial Nominating Commission when he came to office in 2003, invoking John Adams as he pledged a 'squeaky clean process that has no room for politics and favors.'" (Michael Levenson, "Romney Curtails Judicial Vacancy Panel," *The Boston Globe*, 4/9/06)

Romney Broke Pledge Not To Make Lame Duck Judicial Nominations

Despite Vowing Not To Make Lame Duck Nominations After November 8, Romney Nominated 15 People To The Bench After His Self-Imposed Deadline. ("Massachusetts News In Brief," *The Associated Press*, 12/21/06)

In First Two And A Half Years Of His Term, Romney Picked Democrats & Independents 75% Of The Time

July 2005: Romney "Passed Over GOP Lawyers For Three-Quarters Of The 36 Judicial Vacancies" He Had Faced At That Time. "Governor Mitt Romney, who touts his conservative credentials to out-of-state Republicans, has passed over GOP lawyers for three-quarters of the 36 judicial vacancies he has faced, instead tapping registered Democrats or independents including two gay lawyers who have supported expanded same-sex rights, a *Globe* review of the nominations has found." (Raphael Lewis, "Romney Jurist Picks Not Tilted To GOP," *The Boston Globe*, 7/25/05)

- **Romney's Picks By The Numbers:** "Of the 36 people Romney named to be judges or clerk magistrates, 23 are either registered Democrats or unenrolled voters who have made multiple contributions to Democratic politicians or who voted in Democratic primaries, state and local records show. In all, he has nominated nine registered Republicans, 13 unenrolled voters, and 14 registered Democrats." (Raphael Lewis, "Romney Jurist Picks Not Tilted To GOP," *The Boston Globe*, 7/25/05)

During His Full Term, Romney Chose Left-Leaning Jurists At Least 50% Of The Time

At Least 46 Registered Democrats Or Democrat Donors: A study of Romney's 80 nominations to the bench shows that Romney chose at least 46 nominees who were registered Democrats or independent voters who had contributed to Democratic campaigns.

PROBLEMS WITH SPECIFIC NOMINEES

Romney Chose Two Openly Gay Lawyers For State Bench

Romney Nominated Candidates Who Are Strong Advocates Of Gay Rights. "Governor Mitt Romney, who touts his conservative credentials to out-of-state Republicans, has passed over GOP lawyers for three-quarters of the 36 judicial vacancies he has faced, instead tapping registered Democrats or independents including two gay lawyers who have supported expanded same-sex rights, a *Globe* review of the nominations has found." (Raphael Lewis, "Romney Jurist Picks Not Tilted To GOP," *The Boston Globe*, 7/25/05)

- **Romney:** “I’ve appointed approximately 60 judges, one or two of whom... one of whom I’m quite confident is gay, the other may be gay as well. I think he probably is, and there may be more for all I know.” (Interview with Marc Ambinder, “Romney Explains Himself,” *National Journal*, 2/9/07)
- **[Marianne] Hinkles Is An “Openly Gay” Judge.** (Laura Kiritsy, “Romney Fires Another Gay,” *Bay Windows*, 7/20/06)
- **Hinkles Is A Member Of Dignity/USA, An Organization Of Gay And Lesbian Catholics.** (Raphael Lewis, “Romney Jurist Picks Not Tilted To GOP,” *The Boston Globe*, 7/25/05)
 - o **DignityUSA Vision Statement:** “DignityUSA envisions and works for a time when Gay, Lesbian, Bisexual and Transgender Catholics are affirmed and experience dignity through the integration of their spirituality with their sexuality, and as beloved persons of God participate fully in all aspects of life within the Church and Society.” (DignityUSA Website, www.dignityusa.org, Accessed 2/21/07)
- **[Stephen] Abany Is An “Openly Gay” Judge.** (Laura Kiritsy, “Romney Fires Another Gay,” *Bay Windows*, 7/20/06)
- **Abany Is A Former Board Member Of The MA Lesbian And Gay Bar Association.** (Raphael Lewis, “Romney Jurist Picks Not Tilted To GOP,” *The Boston Globe*, 7/25/05)
- **Abany Organized Opposition To Bill That Would Have Outlawed Same-Sex Marriage.** In May, Romney selected for a district court judgeship Stephen S. Abany, a former board member of the Massachusetts Lesbian and Gay Bar Association who organized the group’s opposition to a 1999 bill to outlaw same-sex marriage. (“Republican Governor Leans To Dems When Selecting Judges,” *The Associated Press*, 7/25/05)
 - o **Romney Noted Liberal Tilt Of State Bench Days Before Nominating Abany.** Two days before nominating Abany, Romney “was lamenting the liberal tilt of the state’s bench, telling Fox News that, ‘our courts have a record here in Massachusetts, don’t they, of being a little blue and being Kerry-like.’” (Raphael Lewis, “Romney Jurist Picks Not Tilted To GOP,” *The Boston Globe*, 7/25/05)
- **Abany Told Man To Obey Police And Then “Sue The Pants Off Them.”** “Even if you are being treated unfairly by police, Judge Stephen Abany told Richard Sorell, you must still obey the officers – but then ‘you sue the pants off them.’” (Julie Manganis, “Bewitched Statue Protester Files Civil Rights Suit,” *Salem News*, 7/28/06)

Romney Appointed Commissioner Of Controversial State Agency To Judgeship

Romney Appointed Department Of Youth Services Commissioner Michael Bolden – Who Repeatedly Defended Troubled Agency – To Seat On Boston Municipal Court. “Gov. Mitt Romney nominated the state’s youth services commissioner Wednesday to become an associate justice at the Boston Municipal Court, after three years leading an agency that often found itself caught up in controversy. If approved by the Governor’s Council, Michael Bolden will become a judge in the court’s Roxbury division.” (“Massachusetts News In Brief,” *The Associated Press*, 12/8/04)

- **Department Record: 100 Attempted Suicides In Two Years By Teens In Agency’s Care.** “In March, Bolden found himself defending the agency after a published report revealed that 100 teenagers in the care of his department had attempted suicide in the preceding two years, and two had succeeded. Bolden said that his staff is trained to prevent suicides, but cannot prevent all of them.” (“Massachusetts News In Brief,” *The Associated Press*, 12/8/04)
- **One Employee Was Allowed To Remain On The Job After Strip Searching 13-Year-Old Boy.** “In July, the issue was a DYS employee who was allowed to continue working in a Worcester juvenile jail for nearly two months after he allegedly conducted a sexually humiliating strip search on a 13-year-old boy.” (“Massachusetts News In Brief,” *The Associated Press*, 12/8/04)
- **Bolden Allowed Release Of 130 Juvenile Offenders To Make A Political Point.** “The short-lived decision by the Department of Youth Services to release 130 offenders on the alleged grounds of budgetary insufficiency without telling [Gov. Jane Swift’s] office was, calculated or not, a huge insult. She was negotiating a \$6.4 million supplemental appropriation with cooperative legislative leaders to cover the money gap, and her staff says the leadership of DYS knew it. Commissioner Michael Bolden and his boss, Health and Human Services Secretary Robert Gittens, apparently wanted us to believe that money was so short they immediately had to close 164 beds, 14 percent of residential capacity. But to order 130 kids let loose with 88

percent of the fiscal year remaining, and roughly that much of the available money unspent, is an insult to everyone's intelligence..." (Editorial, "DYS Fiasco Insults Our Intelligence," *Boston Herald*, 8/16/02)

- **During '02 Campaign, *Boston Herald* Urged Romney To Fire Bolden If He Won Office.** "If Mitt Romney wins the Corner Office, he should tell these two [Bolden and former HHS Secretary Robert Gittens] not to submit resumes." (Editorial, "DYS Fiasco Insults Our Intelligence," *Boston Herald*, 8/16/02)

Romney Appointed Woman Who Called State Police "Storm Troopers"

Romney Appointee Renee Dupuis Called State Police "Storm Troopers." "But now Gov. Mitt Romney, preparing to run for president as a conservative Republican, is trying to appoint as a judge a woman who in a sworn 2001 deposition referred to the Rhode Island State Police as 'storm troopers...' This is from Renee [Dupuis] statement: 'All he did was scream and yell and rant and rave that he was showing up . . . with the Rhode Island state police. . . . He called my mother, who is 67 years old, and terrorized her that he was going to show up with the storm troopers from Rhode Island.'" (Op-Ed, Howie Carr, "Mitt's Pick Courts Controversy," *Boston Herald*, 8/7/05)

Dupuis Allegedly Threatened She Would Shoot Her Ex-Husband, Saying She Would Be Better Off If He Was Dead. "A top Bristol County prosecutor up for a juvenile court judgeship allegedly recently told her ex-husband she should 'just shoot' him as their bitter custody battle rages in Plymouth Probate and Family Court, records show. State police Sgt. Barry J. Domingos claimed that his ex-wife, former homicide prosecutor Renee Dupuis, said: 'We would be better off if you were dead. I should just shoot you' according to a June 6 affidavit reviewed by the Herald." (Maggie Mulvihill, "Claims Probed In Judge Pick; Appointment On Hold," *Boston Herald*, 8/9/05)

Romney Waived His Own Executive Order For "Emergency" Nomination Of Previously Rejected Judge

Claiming Emergency Vacancy, Romney Waived His Own Executive Order To Appoint Henry Rigali To Juvenile Court. "Gov. Mitt Romney has named a lawyer to the Juvenile Court without approval from the current Judicial Nominating Commission, bypassing a complex system that was designed to combat patronage and favoritism in judicial picks. Citing a vacancy that was 'seriously hampering the court's ability to keep up with its caseload,' Romney nominated Springfield attorney Henry L. Rigali for a seat on the Hampden County Juvenile Court, waiving a provision in his own Executive Order 466 that would have required Rigali's approval by the JNC within the last 18 months in order for the nomination to be allowed." (Melissa A. Murphy, "MA Governor Bypasses Selection Process With Judicial Pick," *Massachusetts Lawyers Weekly*, 8/1/05)

Rigali Already Had Been Rejected For Superior Court Judgeship In The Past. "Rigali, who has already been rejected for a superior court judgeship, has been slammed for a lack of experience and for wrongfully convicting a Springfield man. His nomination also has been questioned because Romney waived some application rules for him." (Dave Wedge, "Objections Raised Vs. Romney Bench Nominees," *Boston Herald*, 8/10/05)

Rigali Nomination Was Eventually Withdrawn Over Controversy Surrounding Romney Bypassing Nomination Process. "When Rigali's well-publicized nomination was later withdrawn amid controversy that the governor had bypassed the judicial nominating process, most assumed that another candidate would be named shortly. But now, almost 20 months after the position first opened, the judgeship remains unfilled..." (David Frank, "Vacancy On Hampden Juvenile Court Has Lawyers And Judges Miffed," *Massachusetts Lawyers Weekly*, 2/13/06)

Romney Nominated Lawyer Who Defended Drunk Driver And Child Rapist

Dominic Paratore Called Sentence Of Six Years For His Client, A Drunk Driver Who Killed Standout High School Student, "A Little Bit Harsh." "A high school dropout whose drunken death-defying dash up Route 1 on Christmas night 2001 killed one of the top high school students in the country was sentenced yesterday to spend at least the next six years behind bars ... 'I think it's a little bit harsh,' defense attorney Dominic Paratore said. The maximum sentence [Brendan] Murphy could have received was 15 years. 'He was celebrating with friends and made a bad choice,' Paratore said." (Laurel J. Sweet, "Wakefield Man Gets Six Years For DUI Death Of Star Student," *Boston Herald*, 3/17/03)

Paratore Also Defended An Accused Child Rapist, Calling Him "A Hard-Working Kid." "A Wilmington man pleaded innocent yesterday to charges he raped two girls repeatedly, sexually assaulted a third and fed alcohol and drugs to a fourth over the past six years. 'He's a hard-working kid who's never been in trouble with the law before,' [Andrew] Ventre's attorney, Dominic Paratore, said. 'His employer supports him. His mother and family are supporting him.'" (Jose Martinez, "Man Pleads Innocent To Child Rape Charges," *Boston Herald*, 1/15/00)

Romney Appointed Judge Seen As Easy On Criminals

Mitchell Sikora Sentenced Woman Whose Speeding Car Killed A Police Officer To Probation And Community Service. “After Garland pleaded guilty yesterday to negligent motor vehicle homicide, speeding and driving to endanger, Sikora continued her case without a finding for four years. During that time, she will be on probation and will be required to perform 2,000 hours of community service.” (David Weber, “Driver Who Killed Cop Could Drive In Six Months,” *Boston Herald*, 4/6/02)

- **Sikora Allowed Same Woman To Reapply For Her Driver’s License In Six Months.** “In 2002, Sikora cleared the way for a woman who pleaded guilty to running down and killing Medfield police officer Daniel McCarthy, 38, to reapply for her driver’s license in six months. Rita Garland served no prison time for motor vehicle homicide and reckless driving.” (Laurel J. Sweet And Howie Carr, “Nominee Faces Judgment Day,” *Boston Herald*, 11/21/06)

Sikora Acquitted Man Accused Of Killing Woman With Date Rape Drug. “In 2004, Sikora engendered the wrath of the family of a Carver woman, Jacqueline O’Donnell, when during a bench trial he acquitted the man accused of accidentally killing her with a date-rape drug.” (Laurel J. Sweet And Howie Carr, “Nominee Faces Judgment Day,” *Boston Herald*, 11/21/06)

Romney Nominee Failed To Disclose Past Sexual Harrassment Reprimand, Asked Female Coworker For Lap Dance

Housing Court Magistrate Nominee Stephen Carreiro Was Reprimanded For 2 Incidents Of Sexual Harrassment, A Fact He Withheld From The Judicial Nominating Commission. “A nominee for the lifetime post of Southeast Housing Court clerk-magistrate was hammered by the Governor’s Council yesterday for failing to disclose he’d been written up for sexual harassment. The two incidents, which Carreiro also withheld from the Judicial Nominating Commission, allegedly occurred six years ago in the Housing Court’s Brockton office. A female housing specialist, who continues to work with Carreiro, first assistant clerk-magistrate, complained in writing to her supervisor that in the presence of two other male assistant magistrates, Carreiro, who is 52 and married, ‘indicated he would like me to accompany him to the Foxy Lady . . . at lunch time.’ ‘Mr. Carreiro further suggested that I should perform either a “lap” or “table” dance at this establishment,’ the woman wrote. Less than a month after that alleged encounter, on Oct. 23, 2000, she said Carreiro again invited her to join him at the strip club. After investigating, now retired Clerk Magistrate Carlton Viveiros stuck a reprimand in Carreiro’s file.” (Laurel J. Sweet, “Blast From Past Hits Magistrate Nominee,” *Boston Herald*, 12/6/06)

Romney Withdrew Carreiro’s Nomination Without Comment. “Governor Mitt Romney abruptly withdrew his nomination of a Freetown lawyer for a top magistrate’s position in the Housing Court yesterday, hours before a scheduled confirmation vote. In recent days, Romney had refused to say whether he stood by Stephen G. Carreiro, his nominee for clerk magistrate of the court’s Southeast Division, after disclosures that Carreiro had been reprimanded for asking a female court employee to give him a lap dance.” (Michael Levenson, “Romney Withdraws Court Nomination Pick Was Cited For Sexual Remark,” *The Boston Globe*, 12/14/06)

Romney Nominated Well-Connected Candidates, Many Of Whom Had Liberal Credentials

Romney Nominee Marianne Hinkle Served As An Aide To Former Gov. Michael Dukakis (D). (Mitt Romney, Letter To The Executive Council, 1/12/05)

Romney Superior Court Nominee Merita Hopkins Served As Chief Of Staff To Boston Mayor Tom Menino (D). (Russell Nichols and Kathleen Burge, “Romney Names 4 Women To Bench,” *The Boston Globe*, 4/27/06)

- **Hopkins Received Letter Of Recommendation From Sen. Ted Kennedy.** (Sen. Ted Kennedy, Letter To The Governor’s Council, 5/15/06)

Romney Nominee C. Jeffrey Kinder Listed Involvement In Association Of Trial Lawyers Of America (ATLA) On His Resume. (Mitt Romney, Letter To The Executive Council, 7/19/06)

- **Kinder Also Contributed To MoveOn.org In 2004.** (Mitt Romney, Letter To The Executive Council, 7/19/06)

Romney Nominee James J. McGovern Listed Involvement In Association Of Trial Lawyers Of America And The Massachusetts Trial Lawyers Association On His Resume. (Mitt Romney, Letter To The Executive Council, 7/19/06)

Nominee D. Lloyd McDonald Formed Republican Group Backing Democratic Legislative Candidate In 1994. “In another case of cross-party support, Suzanne Iannella and D. Lloyd Macdonald have formed a Republicans for Demakis committee in support of the Democrat, Paul Demakis. A total of 24 Republicans in the 8th Suffolk District have signed on. In a joint statement, Iannella and Macdonald said Demakis would ‘provide forceful leadership on the quality-of-life issues affecting our neighborhood – issues that are neither Democratic nor Republican, nor liberal nor conservative.’” (Michael Kenney, “18th Suffolk Race: A Lost Choice,” *The Boston Globe*, 10/30/94)

Romney Nominee Andrew Grainger Was Business Consultant With Ties To Bain & Co. “Andrew R. Grainger, 58, of Boston, who hasn’t tried a case since 1996, also worked as a consultant for Bain & Co. Inc., a business where Romney was an executive. Bain ... hired Grainger’s firm, Centerline Consulting Inc., which he ran between 1996 and 1998, to advise them on legal expenses ... Romney selected Grainger after passing over a lineup of experienced Massachusetts lawyers and judges in 2004 even though they had been approved by Romney’s Judicial Nominating Commission. (Maggie Mulvihill, “Skipper Passes Mitt’s Muster,” *Boston Herald*, 3/17/06)

FEDERAL BENCH RECOMMENDATIONS

Romney Submitted Former Clinton Impeachment Defender For Federal Judgeship

Romney Recommended Lawyer Henry Moniz, Who Defended President Clinton During Impeachment, For Spot On Federal Bench. “Governor Mitt Romney has recommended 13 Massachusetts candidates, including several with strong Democratic backgrounds, for consideration by the White House for a federal judgeship in Boston. ... The list includes ... Henry T. A. Moniz, a lawyer of Cape Verdean descent with the Boston firm Bingham McCutchen, who helped represent President Clinton during the impeachment proceedings...” (Frank Phillips, “Romney Sends White House 13 Choices For US Judgeship,” *The Boston Globe*, 4/11/03)

- “[Moniz] Was One Of Only Seven Attorneys Nationwide Chosen To Join The Democratic Counsel To The Judiciary Committee Of The U.S. House Of Representatives During The Inquiry Of President Clinton’s Impeachment.” (“40 Under 40: Henry T.A. Moniz,” *The Boston Business Journal*, 11/2/01)
- “Moniz Advised And Assisted Democratic Members Of Congress During The Inquiry On The Impeachment Of Former President Clinton.” (Georg Szalai, “Viacom Stresses Radio Standards,” *The Hollywood Reporter*, 2/20/04)

Moniz Worked For Rep. John Conyers (D-MI), Who Now Advocates Impeaching President Bush. “Seeing the country headed toward preimpeachment hearings ... Moniz wrote to Conyers, the ranking member of the Judiciary Committee. ‘I begged for an interview,’ he said later ... ‘Being someone who’s not politically connected, I feel very fortunate to have this position and I owe it all to Congressman John Conyers,’ Moniz said.” (Jean Laquidara Hill, “Local Prosecutor Lands Hearings Role,” *Telegram & Gazette* [Worcester, MA], 12/20/98)

Romney Also Appointed Moniz To A Special Gubernatorial Panel On Capital Punishment. “After months of research and deliberation, a panel appointed by the governor has come up with a way that capital punishment can be instituted in Massachusetts without the risk that an innocent person could be executed, Romney administration aides say. The Governor’s Council on Capital Punishment is in the final stages of preparing its report, the aides said. ... The panel includes ... Henry T.A. Moniz, a lawyer with Bingham McCutcheon in Boston...” (Frank Phillips, “Report To Back Death Penalty,” *The Boston Globe*, 4/22/04)

Romney Recommended Prominent Democrat Donor For Seat On Federal Bench

In 2003, Romney Suggested Worcester Attorney Michael Angelini For A Federal Judgeship. “President Bush is looking for a nominee for a federal judge who could be the next one to sit on the bench in U.S. District Court in Worcester. Michael P. Angelini, chairman of Bowditch & Dewey, is the only Central Massachusetts lawyer on a list of 14 names the governor has sent to Sens. Edward M. Kennedy and John F. Kerry. ... While Mr. Romney reaches out to Democrats, there is a question whether President Bush would overlook Mr. Angelini’s contributions to Democratic candidates over the years.” (Lee Hammel, “Angelini On Short List For Judgeship,” *Telegram & Gazette* [Worcester, MA], 4/3/03)

Angelini’s Political Donations (Federal Candidates, 1992-2006)

Date	Amount	Recipient	Date	Amount	Recipient
10/20/2003	\$200	McGovern, James P	3/17/1999	\$200	McGovern, James P

4/8/2004	\$250	McGovern, James P	12/2/1997	\$200	McGovern, Jim
6/26/2002	\$200	McGovern, James P	6/25/1999	\$500	Kerry, John
6/26/2002	\$200	McGovern, James P	10/2/1996	\$500	Dem. Natl. Committee
3/7/2006	\$500	Forward Together PAC	6/19/1996	\$1,000	Kerry, John
7/18/2005	\$250	Kennedy, Edward M	2/16/1994	\$500	O'Sullivan, Kevin
6/30/2001	\$250	Kerry, John	10/19/1994	\$500	Kennedy, Edward M
6/30/1997	\$500	Kennedy, Joseph P II	10/19/1994	\$300	O'Sullivan, Kevin
2/7/1997	\$300	Kennedy, Joseph P II	10/31/1994	\$200	O'Sullivan, Kevin
6/28/1997	\$500	McGovern, Jim	9/30/1996	\$500	McGovern, Jim
10/19/1998	\$500	McGovern, Jim	10/11/1996	\$222	McGovern, Jim
7/22/1998	\$250	McGovern, Jim	9/9/1992	\$1,000	Early, Joseph D
6/28/1999	\$250	McGovern, James P	2/16/1992	\$250	Tsongas, Paul
6/12/2000	\$250	McGovern, James P	10/30/1992	\$250	Early, Joseph D

(Source: Center For Responsive Politics Website, www.opensecrets.org, Accessed 2/7/07)

Romney Appointed Strong Democrat As Berkshire County District Attorney

Romney Considered Republicans, Ultimately Chose Democrat To Fill Berkshire County Vacancy. "Republican Gov. Mitt Romney on Friday appointed career prosecutor David Capeless, a Democrat, to be interim district attorney for Berkshire County, replacing Gerard Downing, who died suddenly in December. ... Romney, who had also considered Republican candidates, said Capeless would provide continuity for the office, which currently has three first-degree murder cases pending." ("Romney Appoints New Berkshire District Attorney," *The Associated Press*, 1/30/04)

CONFEDERATE FLAG/SOUTHERN ISSUES

Romney Said Confederate Flag In South Carolina Is A State Issue To Be Decided By Local Officials

Romney Believes Flag Controversy Is State Issue. "A former Massachusetts governor, Mitt Romney, has rarely faced the flag question on the campaign trail so far, but a campaign spokesman confirmed yesterday that Mr. Romney believes it is a state issue." (Russell Berman, "Flag Of Dixie Divides GOP Candidates," *New York Sun*, 4/12/07)

"Confederate Flag: [Romney] Said It's A State Issue That Should Be Decided By South Carolinians." ("Where The Candidates Stand," *The State*, 2/11/07)

Romney Would Accept Invite To Speak At Bob Jones University

Romney Would Be "Happy" To Speak At Bob Jones University. "Romney sat down with WPDE-TV in Myrtle Beach, SC 11/28. ... Romney also said he would accept an invite to address Bob Jones University if invited. Romney: 'I'm happy to speak to virtually any audience that's willing to listen to me.'" (*The Hotline*, 11/29/06)

ECONOMIC ISSUES

EXECUTIVE SUMMARY

- State spending increased at well over rate of inflation under Romney's watch, estimated at 24% - more than \$5 billion – over Romney's final three years.
- Under Romney, Massachusetts dramatically underperformed the rest of the nation in terms of job growth.
- Romney has been criticized by experts for failing to deliver on issues of business development and economic growth after selling himself as the "CEO governor."
- 2006 report issued by quasi-public Massachusetts Technology Collaborative warned the state was losing its grip as leader in "innovation economy" and that tech job was alarmingly slow.
- Romney left his successor to fill a budget deficit exceeding \$1 billion.
- Romney raised state fees and taxes more than \$700 million per year, according to independent experts.
- Romney raised fees by roughly \$500 million in his first year alone, a figure that was highest in the nation.
- Romney quadrupled gun licensing fees and raised fees on first responders, real estate transactions, the blind, golfers and many others.
- Massachusetts' state and local tax burden rose more than 7% during Romney's administration.
- Romney refused to endorse the Bush tax cuts in 2003, telling the state's all-Democrat congressional delegation he wouldn't be a cheerleader for the plan.
- Romney implemented three rounds of tax changes (which he referred to as "closing loopholes") which increased business taxes by an estimated \$400 million per year.
- Massachusetts' corporate tax climate now ranks 47th in the nation, according to the Tax Foundation.
- Romney proposed – then backed away from – a new internet tourism tax that would levy higher taxes on users of sites like Orbitz and Travelocity.
- Romney enrolled Massachusetts in multistate compact aiming to end moratorium on internet sales taxes.
- Romney took no position on estate tax issue in 2002 and signed 50% increase in state cremation fee, which observers called "hidden tax on the dead."

SPENDING

On Romney's Watch, State Spending Increased At Rate Well Above Inflation

Under Romney, State Spending Increased By More Than 24% (Over \$5 Billion) In Only Three Years – An Annual Increase Of 8%. Total FY2007 spending is projected by the state to reach roughly \$26.85 billion, an increase of 24.2% from the roughly \$21.6 billion spent in FY04, Romney's first full fiscal year in office. (State Of Massachusetts Website, "Historical Spending," <http://budget.mass.gov>, 4/4/07)

MASSACHUSETTS STATE SPENDING: FY04-FY07

Year	FY04	FY05	FY06	FY07-projected
Outlays	\$21,620,073,992	\$22,337,339,709	\$24,590,214,418	\$26,850,718,837
Prior Yr Increase	--	3.3%	10.1%	9.2%

Total Spending Increase: 24.2%

Romney Has Criticized The Bush Administration For Not Controlling Spending. “In his speech, Romney gave a backhanded criticism of the current Republican administration, saying there is too much spending in Washington and that such spending should be vetoed, something President Bush has not done. But he also called for increased tax cuts coupled with increased spending on the military.” (Mary Beth Schneider, “Romney Blasts Reid For Remarks On Iraq,” *Indianapolis Star*, 4/21/07)

To Close Budget Gap And Fund New Spending, Romney Increased Fees And Taxes By Roughly \$700 Million Per Year, According To Independent Experts

Independent Analysis Found Romney Raised More Than \$700 Million Per Year In Fees And Taxes. “Fees and taxes have increased more than \$700 million a year under Governor Mitt Romney and Lieutenant Governor Kerry Healey, a leading budget specialist said yesterday. Michael J. Widmer – president of the Massachusetts Taxpayers Foundation, which closely tracks state finances – said the state has raised roughly \$740 million to \$750 million per year by increasing fees and corporate taxes gained from what the Romney administration describes as ‘closing loopholes.’” (Brian Mooney, “Analyst Puts Increase In Fees, Taxes At \$700m,” *The Boston Globe*, 9/27/06)

“[R]omney ... Approved Hundreds Of Millions In Higher Fees And Fines Including Raising The Cost Of Getting A Marriage License, Filing A Court Case, Buying A House Or Renewing A Drivers License.” (Steve LeBlanc, “Romney, In Change Of Heart, Signs No-New-Taxes Pledge,” *The Associated Press*, 1/5/07)

Romney Fee Hikes Compared To 1980s Policies Of Then-Gov. Michael Dukakis (D). “Politicians turning to fees when taxes are not an option is nothing new in Massachusetts history. In the early 1980s, then-governor Michael S. Dukakis swore off tax hikes, but proposed a set of fees under a package he called the Revenue Enhancement and Protection Program.” (Joanna Weiss, “Romney Proposals On Fees Draw Fire,” *The Boston Globe*, 2/28/03)

“A 2003 Survey Of States By The National Conference Of State Legislatures Found Massachusetts Imposed At Least \$501.5 Million In Fee Hikes, Far More Than Any Other State In The Nation That Year.” (Steve LeBlanc, “Romney, In Change Of Heart, Signs No-New-Taxes Pledge,” *The Associated Press*, 1/5/07)

Taxpayer Watchdog Group: Romney Disguised Tax Hikes As Fee Increases. “[Citizens for Limited Taxation] is planning a lawsuit to challenge some of the \$500 million in hikes they say are tax increases disguised as fees. They include a boost in the gun permit fee from \$25 to \$100, and a new \$3,000-a-year fee on nursing home ‘self-payers,’ or residents who are not on Medicaid.” (Tom Benner, “Romney Promises Collide With Reality,” *The Patriot Ledger* [Quincy, MA], 12/27/03)

Roughly 100 Days Into Romney’s Tenure, A Boston Herald Editorial Noted His “Over-Reliance” On Fee Hikes And Business Tax Increases. “Romney’s over-reliance on new and higher fees, though, undermines his case that government is riddled with waste, and imposes a burden on working people. And this businessman’s willingness to embrace corporate tax hikes, in the guise of closing tax loopholes, could undermine the state’s economic recovery.” (Editorial, “Romney’s 100 Days A Good Beginning,” *Boston Herald*, 4/11/03)

TAXES

Total State And Local Tax Burden Increased More Than 7% Under Romney And Massachusetts’ Corporate Tax Climate Is Among The Nation’s Worst

State And Local Tax Burden Increased By Over 7% While Romney Was Governor. According to the Tax Foundation, Massachusetts’ state and local tax burden was 9.8% in 2002 – the year before Romney took office – and rose to 10.5% in 2006, an increase of 7.1%. (Tax Foundation Website, <http://www.taxfoundation.org>, Accessed 4/6/07)

Recent Study Found Massachusetts’ Corporate Tax Climate Ranks 47th In The Nation. In the Tax Foundation’s rankings of state-by-state business tax climates for 2007, only three states in the entire country were found to have a worse corporate tax climate than Massachusetts. (Tax Foundation Website, www.taxfoundation.org, Accessed 6/15/07)

To Address State Budget Gap, Romney Implemented Three Rounds Of Tax Changes That Increased Business Taxes By Roughly \$400 Million A Year, According To Most Analysts

Romney Implemented Policies To Close “Corporate Loopholes” – Changes Widely Described As Tax Increases. “Mr. Romney says he did not raise taxes, but some critics say that is not entirely accurate. There was

no broad-based tax increase – no change in the income tax, sales tax or gas tax – but Mr. Romney did increase some fees, and he instituted changes that he called closing corporate tax loopholes, which some consider a euphemism for raising corporate taxes.” (Pam Belluck, “Romney Candidacy Puts Massachusetts Economy in Spotlight,” *The New York Times*, 3/16/07)

Boston Globe: “In All, Three Rounds Of Corporate Tax Changes Produced About \$400 Million In New Revenue Annually, According To State Officials.” “Four years ago, with Massachusetts facing a \$3 billion deficit and struggling economy, Romney avoided raising income or other broad-based taxes by aggressively going after what he described as tax loopholes and by raising fees. In all, three rounds of corporate tax changes produced about \$400 million in new revenue annually, according to state officials. Eventually, Romney pulled back on some \$85 million of corporate tax changes when the business community objected loudly and the economy began improving.” (Steve Bailey, “Patrick Eyes Corporate Tax Changes,” *The Boston Globe*, 2/16/07)

- **Romney’s Policy Changes “Raised The Business Income Tax About \$400 Million A Year.”** “Politicians, Paul Tsongas used to warn, too often treat the business sector as though it’s an ATM machine, tapping it constantly for cash without worrying about replenishing the account. That’s a pretty fair description of what’s been happening here in the last few years. Mitt Romney started it, closing so-called loopholes that raised the business income tax about \$400 million a year.” (Scot Lehigh, Op-Ed, “Business Climate Will Suffer With Rise In Tax Burden,” *The Boston Globe*, 3/6/07)

In Early 2006, A “Chastened” Romney Had To Scale Back Plan To Raise \$170 Million In New Business Taxes After Corporate Community Warned Such Changes Could Hurt The Economy. “Chastened by an outcry from business leaders, Governor Mitt Romney abandoned yesterday his proposal to raise \$170 million by closing corporate tax loopholes and sent legislators a stripped-down version. ‘We’ve heard very broadly from the business community that some of these tax law changes would impact jobs in the state, and we can’t afford that right now,’ said Romney’s spokesman, Eric Fehrstrom. ‘Governor Romney is a good listener, and he’s open to making adjustments in his budget where they are warranted.’” (Scott Greenberger and Janette Neuwahl, “Romney Scales Back Tax Bill On Businesses,” *The Boston Globe*, 3/26/05)

- **Romney’s Plan “Prompted A Loud Outcry From Fiscal Conservatives Nationally And The Business Community.”** “In the first two years as governor, the Legislature has approved his proposal to close other corporate loopholes ... This year, he again proposed to eliminate what he called ‘flaws and outdated provisions’ in state tax law. But, as he tested the waters for a presidential campaign, his latest effort prompted a loud outcry from fiscal conservatives nationally and the business community, an important constituency for him.” (Scott Greenberger and Janette Neuwahl, “Romney Scales Back Tax Bill On Businesses,” *The Boston Globe*, 3/26/05)

Beacon Hill Institute’s David Tuerck Confirms Romney Did Raise Taxes As Governor. WALL STREET JOURNAL’S PAUL GIGOT: “The governor claims that he closed a \$3 billion fiscal gap, budget deficit without raising taxes. So did he raise taxes to do that or not?” TUERCK: “Well, he did. He raised some taxes in the form of closing corporate loopholes, as he called them.” (Fox News’ “Journal Editorial Report,” 3/31/07)

- **Tuerck:** “You can call this closing a loophole if you want ... what it really is is a tax hike.” (Charles Stein, “The Selling Of A State Tax Loophole,” *The Boston Globe*, 4/17/03)

Tax Expert Joseph Crosby “Said It’s Hard To Discern The Difference Between Romney’s Changes And Tax Increases.” “The new governor also collected an additional \$255 million from businesses by closing what he called tax loopholes. ... But Joseph R. Crosby of the Washington-based Council on State Taxation, which monitors tax policy for 575 corporations, said it’s hard to discern the difference between Romney’s changes and tax increases.” (Scott Greenberger, “Romney Often Casts Himself As Budget Hero,” *The Boston Globe*, 10/24/05)

Associated Industries Of Massachusetts’ Eileen McAnneny: “Tough To Characterize” Romney’s Actions “As Anything But A Tax Increase.” McANNENY: “In our estimation, it’s tough to characterize [Romney’s plan to close ‘loopholes’] as anything but a tax increase ... They’re not loophole closings – they are policy changes.” (Scott S. Greenberger and Matthew Rodriguez, “Governor’s Fiscal Plan Targets Tax ‘Loopholes,’” *The Boston Globe*, 3/4/04)

Boston Herald: “It’s A Tax Increase.” “We take the logical view that if a policy change requires more taxes to be paid, it’s a tax increase. But no one can disagree that the end result of Romney’s plans will drive up the cost of doing business.” (Editorial, “Closing ‘Loopholes’ Just A Tax Hike,” *Boston Herald*, 1/10/05)

National Taxpayers Union’s John Berthoud: “That’s A Tax Increase.” “John Berthoud, president of the National Taxpayers Union, retorted, ‘Closing tax loopholes and not cutting rates concurrently – that’s a tax

increase. The loopholes business is sometimes patina to make it seem like it's not really an increase." (Alexander Bolton, "Romney's Tax Record Gets A Closer Look," *The Hill*, 3/28/07)

Experts, Business Groups And Elected Officials Agree Romney Increased Taxes As Governor

Massachusetts Taxpayers Foundation's Michael Widmer: Romney Policies Resulted In Higher Taxes. "[O]fficials from the Massachusetts Taxpayers Foundation say Romney has yet to come clean with national conservatives. ... Foundation president Michael Widmer said several of Romney's policies while governor resulted in higher taxes, including local aid cuts, fee hikes and changes to corporate tax codes." (Casey Ross and Dave Wedge, "It's official: Mitt's In Mix For '08," *Boston Herald*, 2/7/07)

- **Widmer:** "[S]aying that he didn't raise taxes is an incomplete picture." (Casey Ross and Dave Wedge, "It's official: Mitt's In Mix For '08," *Boston Herald*, 2/7/07)
- **Widmer:** "Many of the changes last year, and a number of these in this package, are clearly tax increases in our view." (Scott Greenberger and Matthew Rodriguez, "Governor's Fiscal Plan Targets Tax 'Loopholes'," *The Boston Globe*, 3/4/04)

Cato Institute: Romney's Rhetoric On Taxes "Mostly A Myth." "[R]omney will likely also be eager to push the message that he was a governor who stood by a no-new-taxes pledge. That's mostly a myth. His first budget included no general tax increases but did include a \$500 million increase in various fees. He later proposed \$140 in business tax hikes through the closing of 'loopholes' in the tax code." (Stephen Slivinski, "Fiscal Policy Report Card On America's Governors: 2006," Cato Institute, 2006, p. 26)

- **Cato Awarded Romney A "C" For His 2006 Fiscal Performance.** Romney received a worse score from CATO than Democrats Phil Bredesen (TN), John Lynch (NH) and Bill Richardson (NM). (Cato Institute Website, www.cato.org, Accessed 1/21/07)
- **Cato Gave Romney A "C" For His Overall Tenure.** (Cato Institute Website, www.cato.org, Accessed 1/21/07)

Cato's Stephen Slivinski: "If The Spirit Is To Save Money Before You Increase Revenues, I Don't Think Romney Has Held To The Spirit Of The No-New-Tax Pledge." "'Romney's people are trying to spin this by saying he kept his 'No new taxes' pledge,' said Stephen Slivinski, director of budget studies at Cato. 'I guess if you consider only personal income taxes and sales taxes, he's within bounds. If you take a broader view, he is not.' 'The spirit of [anti-tax pledges] is to force governors to find more innovative ways of funding government,' he added. 'If the spirit is to save money before you increase revenues, I don't think Romney has held to the spirit of the no-new-tax pledge.'" (Alexander Bolton, "Romney's Tax Record Gets A Closer Look," *The Hill*, 3/28/07)

National Taxpayers Union's John Berthoud: "Once The Dollar Amount Of The Fee Exceeds Cost Of Service, We Categorize It As A Tax Hike." "It is legitimate for government to charge a fee for services ... Once the dollar amount of the fee exceeds cost of service, we categorize it as a tax hike. When you look at those aggregate numbers it's hard to imagine the dollars being raised for folks didn't exceed the cost of service." (Alexander Bolton, "Romney's Tax Record Gets A Closer Look," *The Hill*, 3/28/07)

House Taxation Committee Chair Rep. Paul Casey (D): "It's certainly, positively, without a doubt an increase on taxes in certain categories ... What the governor wants to call it is just a semantic battle." (Scott S. Greenberger and Matthew Rodriguez, "Governor's Fiscal Plan Targets Tax 'Loopholes'," *The Boston Globe*, 3/4/04)

Former State Party Chairman Jim Rappaport (R): "The Romney-Healey [administration's] ... biggest public relations/administrative problems [are] the Big Dig and its fee and tax increases." (Kimberly Atkins, "The Monday Morning Briefing," *The Boston Globe*, 10/2/06)

American Thinker's Selwyn Duke: "[R]emember this when Romney touts his credentials as a fiscal conservative. While he may boast of his steadfast refusal to raise taxes, it rings hollow when he turns around and mandates citizen expenditures and levies fines." (Selwyn Duke, "Mitt Romney: A Massachusetts Liberal For President," *The American Thinker*, www.americanthinker.com, 1/9/07)

In 1994, Romney Had Supported An Inflation-Indexed Minimum Wage Hike – Which Would Have Burdened Businesses Even Further

Romney Backed Indexing Minimum Wage To Inflation, Drawing Charges Of Flip-Flopping. "Republican Senate candidate Mitt Romney, who has been hammered by incumbent Democrat Edward M. Kennedy for allegedly opposing a 30-cent increase in the \$4.25 minimum wage, said yesterday on national television that he

would support boosting it by even more through indexing it to inflation. Romney's comments, made on the ABC-TV program 'This Week,' brought charges of flip-flopping by Kennedy spokesman Rick Gureghian, who called it 'a double somersault. He's desperately trying to remake himself because people now know he's the candidate for the rich and privileged, not the working men and women of the commonwealth.'" (Peter Howe, "Romney Recasts His Minimum-Wage Plan," *The Boston Globe*, 10/17/94)

- **Romney Would Have Raised Minimum Wage 50 Percent More Than Ted Kennedy.** "Inflation has risen about 11 percent since the beginning of 1991, so Romney's plan would raise the minimum wage by about 45 cents, or 50 percent more than the Kennedy-proposed increase that Kennedy asserts Romney opposes." (Peter Howe, "Romney Recasts His Minimum-Wage Plan," *The Boston Globe*, 10/17/94)

Romney: Minimum Wage "Ought To Be Updated ... An Inflationary Increase Is Appropriate." "Questioned by ABC newsman Sam Donaldson, Romney said, 'I think the minimum wage ought to keep pace with inflation. I think the minimum wage is a good thing to have in our economy and I think it ought to be updated. We've had some inflation since the time it was set at \$ 4.25 in April 1991, so I think an inflationary increase is appropriate.'" (Peter Howe, "Romney Recasts His Minimum-Wage Plan," *The Boston Globe*, 10/17/94)

Romney Proposed – Then Backed Away From – Plan To Implement "Internet Tourism Tax" On Users Of Online Travel Booking Sites Like Expedia And Travelocity

In 2005, Romney Backed Away From His Plan To Implement An "Internet Tourism Tax" After Being "Spooked By Even The Suggestion He Might Raise Taxes." "Governor Mitt Romney, spooked by even the suggestion he might raise taxes, has backed away from precedent-setting legislation that would have changed the way travelers pay hotel occupancy taxes when they get rooms from companies like Hotels.com, Expedia, and Hotwire. The rationale for the legislation was fairly simple: State and local occupancy taxes should be assessed on the rates consumers actually pay for their hotel rooms. That's the way it works now only when a traveler buys a room directly from a hotel. When the traveler purchases a room through a third-party website, taxes are assessed on the lower wholesale rate the website paid for the room." (Bruce Mohl, "State Backs Off Adjusting Online Occupancy Tax," *The Boston Globe*, 2/13/05)

Plan Would Have Raised \$12-18 Million In New Taxes. "[The proposal] would have raised an estimated \$12 million to \$18 million a year for the state by making consumers who book rooms here through travel websites pay more in state and local hotel occupancy and convention center taxes." (Bruce Mohl, "State Backs Off Adjusting Online Occupancy Tax," *The Boston Globe*, 2/13/05)

Romney's Proposal "Worried Many Hotel Operators Here Who Feared They Might Get Caught In The Middle." "The proposed legislation worried many hotel operators here who feared they might get caught in the middle. The hotels feared the Department of Revenue might come after them for the additional tax money if the online resellers refused to voluntarily pass it along. Hotel operators worried they might have to chase the websites for the money or, worse, collect it from customers at check-in." (Bruce Mohl, "State Backs Off Adjusting Online Occupancy Tax," *The Boston Globe*, 2/13/05)

Boston Herald Called Romney's Plan "Pennywise And Pound Foolish." "Bureaucratic quibbling aside, consumers will be stuck paying higher taxes if a proposed Internet hotel tax becomes law. That sure sounds like a textbook tax increase to us. In a state where tourism is the third biggest industry with an economic impact of some \$11 billion a year, it is pennywise and pound foolish to raise taxes on hotel rooms booked through Web sites like Expedia.com or Travelocity .com for the relative pittance of \$18 million." (Editorial, "Hotel Tax 'Loophole' Sham," *Boston Herald*, 7/9/04)

Romney "Got Cold Feet" And Dropped The Plan To Raise Taxes On Internet Tourism After Opposition From Low-Tax Advocates. "The state Department of Revenue last year sought to tax all rooms the same way, no matter how they were purchased. The hotel industry blocked the measure, deriding it as an 'Internet tourism tax.' The department was ready to try again this year when Romney got cold feet and deleted it from a loophole-closing package. Eric Fehrstrom, Romney's communications director, said the governor dropped the initiative for two reasons. First, it failed to pass last year and its chances this year were considered slim. Second, Barbara Anderson, executive director of Citizens for Limited Taxation, objected to it. 'She thought it was a tax increase,' Fehrstrom said." (Bruce Mohl, "State Backs Off Adjusting Online Occupancy Tax," *The Boston Globe*, 2/13/05)

Romney Proposed And Instituted Sales Tax On Downloading Software

Romney Proposed The New Tax On Downloaded Software. "A recent proposal by Gov. Mitt Romney to tax software downloaded from the Internet has drawn mixed reactions from legislators and industry organizations.

Consumers must pay a 5 percent sales tax when they buy software in stores, but do not need to pay it when shopping online. The bill would tax programs downloaded from the internet with the state's standard 5 percent sales tax." (Andrew Shapira, "Romney To Support A Sales Tax On Downloaded Software," [Boston University] *The Daily Free Press*, 4/25/03)

Sales Tax Applied To Downloaded Software For The First Time. "Software that is delivered to the end user by download will, for the first time, be subject to Massachusetts sales tax starting next month. The same goes for so-called 'load-and-leave' delivery, through which a software maker installs the program on your computer. Lawmakers estimate the annual windfall to be somewhere along the lines of \$50 million." (Op-ed, Cosmo Macero Jr., "Download This: No More Free Ride On Net Software Buys," *Boston Herald*, 3/7/06)

New Tax Approved "With The Full Support Of Romney." "The quiet tax hike was included in a package of 'loophole' closing legislation approved last year with the full support of Romney." (Op-ed, Cosmo Macero Jr., "Download This: No More Free Ride On Net Software Buys," *Boston Herald*, 3/7/06)

Software Sales Tax Expected To Impact Businesses The Hardest. "[A]ccording to Department of Revenue spokesman Tim Connolly, the tax would not significantly affect the average consumer because most of the revenue would come from corporations rather than individuals." (Andrew Shapira, "Romney To Support A Sales Tax On Downloaded Software," [Boston University] *The Daily Free Press*, 4/25/03)

Romney Signed Multistate Pact And Passed Law To Allow For Internet Sales Tax In Massachusetts

Massachusetts Originally Opposed Internet Tax To Be Seen As A "High-Tech Friendly State." "To foster a reputation as a high-tech friendly state, Massachusetts took the lead in supporting a congressional moratorium on such taxes, which was extended in 2001 to November of 2003 with the support of President George W. Bush. Where some Main Street businesses saw unfair competition, state leaders saw the almost boundless potential of the Internet to open new markets, and Massachusetts as an incubator for new cyberspace technology." (Editorial, "Internet Sales Tax Shortsighted Move," *Boston Herald*, 3/19/03)

Romney Endorsed Plan That Would End Moratorium On Internet Sales Tax For 35 States, Including Massachusetts. "Now, Romney has signed onto a plan for Massachusetts to join the Streamlined Sales Tax Project, with more than 35 other states to simplify sales tax rules and ultimately clear the way for all online merchants to collect taxes and return them to the coffers of the proper jurisdiction." (Editorial, "Internet Sales Tax Shortsighted Move," *Boston Herald*, 3/19/03)

Romney Signed Law To Enroll Massachusetts In The Multistate Collaborative. "A new law signed by Gov. Mitt Romney enrolls Massachusetts in a multistate collaborative looking for a better way for states to collect taxes on Internet sales." (Steve LeBlanc, "New Law Could Pave Way For Internet Sales Taxes In Massachusetts," *The Associated Press*, 3/16/03)

Romney Signed Bill To Help Balance Budget. "Romney spokeswoman Nicole St. Peter said the governor signed the bill after a suggestion from the legislature. 'It was part of the budget balancing bill for the fiscal year '03,' St. Peter said." (Dennis Mayer, "Internet Sales Should Be Taxed, Romney Says," [Boston University] *The Daily Free Press*, 4/25/03)

Romney's Republican Predecessors Both Opposed Internet Sales Tax. "Former Gov. Paul Cellucci and former acting Gov. Jane Swift both opposed Internet sales taxes. Swift last year vetoed the same bill Romney just signed." (Steve LeBlanc, "New Law Could Pave Way For Internet Sales Taxes In Massachusetts," *The Associated Press*, 3/16/03)

Today, Mitt Romney Says He Will "Fight To Permanently Abolish The Death Tax" But Took "No Position" On State Estate Tax Hike In 2002

Romney Now Supports Permanent Elimination Of Death Tax. "As part of his agenda to lower the tax burden on the American people, Governor Romney has proposed permanently eliminating the Death Tax. Governor Romney believes you strengthen the American people by letting them keep more of their own money, and not taxing their families at death." (Mitt Romney, "Policy Briefing: Abolishing The Death Tax," Press Release, 4/19/07)

- **Romney:** "I believe that it's simply unfair to tax people when they earn their money, then again when they save their money, and then again when they die." (Thomas Beaumont, "Eliminating Federal Estate Tax Good For Iowans, Romney Says," *Des Moines Register*, 4/20/07)

In 2002, Massachusetts Changed Estate Tax Rules So That "Average Taxable Estate Could End Up Paying Tens Of Thousands Of Dollars In Additional Charges." "Thousands of Bay State residents will soon face

higher Massachusetts estate taxes because of the state's efforts to retain the 'death tax' even as the federal government moves to eliminate its levy. ... The change in the state's death tax, which takes effect Jan. 1, initially affects estates worth more than \$700,000, according to the Revenue Department. It's that level that is the key difference between the old and new rules, because \$700,000 is below the federal standard, meaning that estates that may be exempt from the federal tax will still owe the state. Under the old rules, the state and federal exemptions were the same. The average taxable estate could end up paying tens of thousands of dollars in additional charges under the new rules, which break the link between the state and the federal tax." (Charles A. Jaffe, "Residents Face Higher Estate Taxes," *The Boston Globe*, 11/15/02)

Change In Estate Tax Law Meant \$30 Million To \$40 Million In Higher Taxes Each Year. "The Massachusetts Department of Revenue estimates that a rule change – made as part of last summer's budget bill – will mean an additional \$30 million to \$40 million in estate tax revenues will flow into state coffers during fiscal 2004, the first full year in which the new rules are in play." (Charles A. Jaffe, "Residents Face Higher Estate Taxes," *The Boston Globe*, 11/15/02)

- **Romney Took "No Position" On Estate Tax Issue.** "In Massachusetts, the move was made as part of the budget bill passed last summer, but the new rules were not issued until late October. Governor-elect Mitt Romney disagreed with the tax and budget approach taken by the Legislature, but a spokesman for his office said he has no position on the estate tax issue." (Charles A. Jaffe, "Residents Face Higher Estate Taxes," *The Boston Globe*, 11/15/02)

Rules Change "Will Keep State Estate Tax Revenues Flowing And Growing." "The change will keep state estate tax revenues flowing and growing. During fiscal 2003, which began July 1, the DOR expects to collect \$125 million in estate tax revenues; that will increase to as much as \$165 million in fiscal 2004 – the first full year under the new rules – and go up to \$190 million by fiscal 2006." (Charles A. Jaffe, "Residents Face Higher Estate Taxes," *The Boston Globe*, 11/15/02)

- **Salem Tax Attorney Paul Bernstein:** "People who have done estate planning need to prepare for this change, or they'll be caught with an unpleasant surprise, owing taxes when they thought they were protected ..." (Charles A. Jaffe, "Residents Face Higher Estate Taxes," *The Boston Globe*, 11/15/02)

Boston Estate Tax Planning Attorney Stephen Ziobrowski Said Rules Change Could Lead To Massachusetts Residents Fleeing State To Avoid Estate Tax. "You don't see much advice suggesting people leave Massachusetts anymore," said Ziobrowski, "but maybe attorneys will just re-draft those old letters and suggest that their clients move to Florida. ... That's where people used to go to avoid Massachusetts's estate tax, and it may be what they start doing again." (Charles A. Jaffe, "Residents Face Higher Estate Taxes," *The Boston Globe*, 11/15/02)

As Governor, Romney Signed Into Law 50% Increase In State Cremation Fee, Called By Some A "New Hidden Tax On The Dead"

Romney Signed "Hidden Tax On The Dead" Into Law, Raising State Fee For Cremation Services By 50%. "The state has quietly increased the fee for cremations by 50 percent to raise money for the embattled Office of the Chief Medical Examiner, prompting outrage among funeral providers over a 'new hidden tax on the dead.' ... Under the new law, passed by the Legislature and signed by Gov. Mitt Romney, the current fee of \$50 – which was being paid directly to medical examiners when they approved bodies for cremation – will go up to \$75. The fee could go up again at the discretion of the Romney administration." (Tom Mashberg, "Cremation Fee Increase Called 'Tax On The Dead,'" *Boston Herald*, 1/21/04)

- **"[A]ny Body That Is Cremated Must First Be Cleared By A Medical Examiner, Which Carries A \$75 Fee."** (Jack Dew, "The Final Price," *The Berkshire Eagle*, 3/25/07)

***Boston Herald* Questioned Romney's Obsession With Fee Increases In Light Of Cremation Fee Hike.** "Gov. Mitt Romney is coming perilously close to deserving the reputation of a politician who'll slap a fee on anything that moves – and sometimes that which doesn't move. Such is the case with the administration's new higher fee for cremation." (Editorial, "Here A Fee, There A Fee," *Boston Herald*, 1/23/04)

- ***Herald*: Cremation Fee "Makes The Disguised Tax Argument Ever Easier To Make."** "The cremation fee increase, coming on top of some \$500 million in fees supported by the governor and Legislature last year, makes the disguised tax argument ever easier to make. We hope Romney's budget proposal released next week doesn't add fuel to this fire." (Editorial, "Here A Fee, There A Fee," *Boston Herald*, 1/23/04)

Cremation Fee Estimated To Raise \$1 Million Per Year. “The crematories will be asked to collect the added money and send it directly to the M.E.’s Office. The state expects the income from the fees, reflecting some 14,000 cremations a year, to reach \$1 million.” (Tom Mashberg, “Cremation Fee Increase Called ‘Tax On The Dead,’” *Boston Herald*, 1/21/04)

Higher Cremation Fee’s Usefulness Was Widely Questioned, Attacked As Tax On The Poor

Funeral Consumers Alliance Of Eastern Massachusetts’ Byron E. Blanchard: “This is another rip-off ... It represents a sizable portion of the cost of a cremation. It’s a boondoggle.” (Tom Mashberg, “Cremation Fee Increase Called ‘Tax On The Dead,’” *Boston Herald*, 1/21/04)

- **Tax On The Poor:** “The state has said it will use the revenue to increase pay to pathologists. But Blanchard and others question the value of any cremation ‘viewing’ fee altogether. They call it a tax on the poor because it boosts the price of an affordable cremation from about \$200 to \$275.” (Tom Mashberg, “Cremation Fee Increase Called ‘Tax On The Dead,’” *Boston Herald*, 1/21/04)

Graham Putnam Funeral Home’s Peter Steffan: “Since when does the government care about poor families? They could raise the fee to \$100 and the cost would just be passed along.” (Tom Mashberg, “Cremation Fee Increase Called ‘Tax On The Dead,’” *Boston Herald*, 1/21/04)

Anonymous Medical Examiner: “They’ve Put A New Fee On The Backs Of The Public...” “[A]t least one veteran examiner from Central Massachusetts, who spoke on condition of anonymity, said the new fee and paperwork could prompt pathologists to decline doing cremations, raising the specter of bodies being left to await available medical examiners. ‘They’ve put a new fee on the backs of the public without even consulting with the medical examiners first about whether it makes sense,’ the examiner said.” (Tom Mashberg, “Cremation Fee Increase Called ‘Tax On The Dead,’” *Boston Herald*, 1/21/04)

Then-Chief Medical Examiner Was On Record As Calling Cremation Fee “Ridiculous.” “In a 1995 article in the Boston Globe, controversial Chief M.E. Richard F. Evans, who is facing an ethics probe into his handling of the office over the past decade, derided the cremation fees as ‘ridiculous’ and ‘unnecessary.’” (Tom Mashberg, “Cremation Fee Increase Called ‘Tax On The Dead,’” *Boston Herald*, 1/21/04)

Under Romney, Homeowners Saw Property Taxes Rise To Highest Level In Decades

Massachusetts Property Taxes At Highest Level In 25 Years. “Geoffrey C. Beckwith, executive director of the Massachusetts Municipal Association, which represents cities and towns, said property taxes are soaring statewide. Because of cuts in state aid, towns collect more from property taxes than they have in 25 years, he said. ... ‘Not only have property taxes gone up, but residents are paying more and getting less,’ said Beckwith.” (Matt Carroll, “The Tax Lowdown,” *The Boston Globe*, 1/11/07)

Median Property Taxes Have Increased 42 Percent So Far This Decade With No Relief In Sight. “Massachusetts property taxes, which have shot up 42 percent, on a median basis, so far this decade will continue to rise for most homeowners this year despite the softening real estate market. ... Indeed, not only have property taxes grown sizably all across Massachusetts, the increases have been steady, without interruption, in each year of the decade so far. Statewide the average single-family property tax bill has grown to \$3,703, from \$2,577 in fiscal 2000. The 42 percent median increase in property taxes compares to a 27 percent increase in median household income for roughly the same period.” (Thomas Caywood and Andrew Caffrey, “Prices Down, Bills Up,” *The Boston Globe*, 10/22/06)

Romney Cut State Aid To Cities And Towns, Forcing Property Tax Increases Throughout The State

Massachusetts Experienced Largest Property Tax Increase In A Dozen Years. “Massachusetts residents experienced the largest two-year increase in property taxes in a dozen years as cities and towns struggled to make up for a slowdown in state aid between 2001 and 2003, according to a study released ... by the Massachusetts Taxpayers Foundation.” (Scott S. Greenberger, “Property Taxes Leap As State Aid Falls,” *The Boston Globe*, 10/29/03)

- **“Per-Capita Property Taxes Climbed An Average Of 3 Percent A Year In Fiscal 2002 And 2003, Which Translates Into An Increase Of \$73 For Every Man, Woman, And Child In The Commonwealth.”** (Scott S. Greenberger, “Property Taxes Leap As State Aid Falls,” *The Boston Globe*, 10/29/03)

Property Tax Caps Increased By Up To Six Times Due To Financial Stress On Localities. “In another sign of the financial stress on cities and towns ... residents in 39 communities voted to override the annual property tax limit in 2003, approving a total of \$48 million in new revenue. That amount is twice as much as what was adopted in 2002 and more than six times the average between 1994 and 2000.” (Scott S. Greenberger, “Property Taxes Leap As State Aid Falls,” *The Boston Globe*, 10/29/03)

- **Massachusetts Taxpayers Foundation’s Michael Widmer:** “Clearly the cuts from the fiscal crisis have had a direct impact in producing higher property taxes.” (Scott S. Greenberger, “Property Taxes Leap As State Aid Falls,” *The Boston Globe*, 10/29/03)
- **Property Tax Increases “Likely To Accelerate” Because Of Romney Cuts In State Aid.** “In fiscal year 2003, [state] aid decreased by about 3 percent, the first decline in more than a decade. The property tax trend is likely to accelerate ... because Romney ... made even deeper cuts in state aid in the current fiscal year, 2004, which isn’t covered in the report.” (Scott S. Greenberger, “Property Taxes Leap As State Aid Falls,” *The Boston Globe*, 10/29/03)

Experts Agree Romney’s Local Aid Cut Forced Property Tax Increases

“Particularly Painful For Poorer Communities...” “Many local officials say Beacon Hill’s approach is particularly painful for poorer communities reliant on state help. Compared with income taxes, property taxes place a disproportionate burden on lower-income residents, retirees on fixed incomes, and the unemployed.” (Scott S. Greenberger, “Property Taxes Leap As State Aid Falls,” *The Boston Globe*, 10/29/03)

- **Fall River Mayor Ed Lambert:** “There’s no question that what is happening at the state level is a shifting of the burden onto the backs of people who are less able to afford to pay for services. ... For the governor to raise his hands and say he doesn’t support increasing taxes on the backs of working people totally ignores what has to happen at the city level and the town level.” (Scott S. Greenberger, “Property Taxes Leap As State Aid Falls,” *The Boston Globe*, 10/29/03)

“Geoffrey Beckwith, Executive Director Of The Massachusetts Municipal Association, Said Huge Cuts In Local Aid In 2003-04 To Cope With The Fiscal Crisis Continue To Strain Local Budgets And Tax Bases.” (Brian C. Mooney, “Analyst Puts Increase In Fees, Taxes At \$700m,” *The Boston Globe*, 9/27/06)

- **Beckwith:** “The cuts were so deep in 2003 and 2004 that there are still 113 cities and towns [out of 351] today that still receive less local aid than they did in fiscal year 2002, and that’s without adjusting for inflation.” (Brian C. Mooney, “Analyst Puts Increase In Fees, Taxes At \$700m,” *The Boston Globe*, 9/27/06)
- **Beckwith:** “All of this is happening in the context of thousands of people being laid off, larger class sizes, fewer police officers and firefighters, and the stopping of routine maintenance on buildings ... So we have both an increase in the local property tax burden and a reduction overall in the full range of local services that are provided.” (Scott S. Greenberger, “Property Taxes Leap As State Aid Falls,” *The Boston Globe*, 10/29/03)

Now Running For President, Romney Signed ATR’s “No New Taxes” Pledge But Refused To Sign It In 2002 And Did Not Guarantee He Would Hold The Line On Taxes

Romney Signed Pledge As His Presidential Campaign Began. “Almost five years after he refused to sign a ‘no new taxes’ pledge during his campaign for governor, Mitt Romney announced ... that he had done just that, as his campaign for the 2008 Republican presidential nomination began in earnest.” (Scott Helman, “Romney Finds ‘No New Taxes’ Promise Suits Him After All,” *The Boston Globe*, 1/5/07)

- **Media Noted Signing Of Pledge Symbolized His Shift In Focus To GOP Primary Voters.** “Romney’s announcement about signing the pledge came on his first day out of office, and it symbolized what’s now his biggest priority: building support from GOP activists and voters, especially in states with early primaries.” (Scott Helman, “Romney Finds ‘No New Taxes’ Promise Suits Him After All,” *The Boston Globe*, 1/5/07)

Romney’s 2002 Refusal To Sign Pledge “Broke With GOP Tradition.” “Four years ago, Mitt Romney broke with GOP tradition and refused to sign the [Americans for Tax Reform] pledge [to ‘oppose and veto any and all efforts to increase taxes’].” (Lisa Wangsness, “Healey Will Sign Antitax Pledge,” *The Boston Globe*, 9/4/06)

- **“Romney’s Gubernatorial Campaign Spokesman, Eric Fehrstrom, Dismissed Such Pledges At The Time As ‘Government By Gimmickry.’”** (Scott Helman, “Romney Finds ‘No New Taxes’ Promise Suits Him After All,” *The Boston Globe*, 1/5/07)

Romney “Rebuffed” Calls To Sign Pledge, Drawing Wrath Of Anti-Tax Advocates. “Gubernatorial front-runner Mitt Romney drew the wrath of GOP anti-tax stalwarts ... by refusing a ‘no new tax’ pledge to back his levy-cutting promises. Breaking with the past three Republican governors, Romney rebuffed perennial calls by Citizens for Limited Taxation to sign the vaunted pledge.” (David R. Guarino, “Romney Refuses To Sign CLT’s ‘No New Tax’ Pledge,” *Boston Herald*, 3/28/02)

- **Citizens For Limited Taxation’s Barbara Anderson:** “It bodes ill for him to understand a lot of things he will need to understand in order to govern effectively in Massachusetts ... You have to have that tool, that club to the Legislature, to survive.” (David R. Guarino, “Romney Refuses To Sign CLT’s ‘No New Tax’ Pledge,” *Boston Herald*, 3/28/02)

In 2002, Romney “Deflected” Question Asking If FY02 Budget Should Have Been Balanced Without Tax Hikes. “But Romney deflected a question about whether he thinks this year’s budget should have been balanced without new taxes, saying that if he had been governor, the state would have been spending far less and would have had a larger rainy day fund on hand to close a budget gap.” (Rick Klein and Yvonne Abraham, “Romney Faults O’Brien On Taxes,” *The Boston Globe*, 10/4/02)

“[W]hile He Reiterated His Commitment To Rolling Back The Recent \$1.2 Billion Tax Hike Within Four Years, He Refused To Rule Out Support For Further Tax Increases.” (Rick Klein and Yvonne Abraham, “Romney Faults O’Brien On Taxes,” *The Boston Globe*, 10/4/02)

Romney: “I Can’t Give You A Guarantee” On Not Raising Taxes. “My position on taxes is very clear: I’m going to fight taxes ... [but] I can’t give you a guarantee. We could have a monster come out of the deep and grab Beacon Hill.” (Rick Klein and Yvonne Abraham, “Romney Faults O’Brien On Taxes,” *The Boston Globe*, 10/4/02)

STATE FEES

Romney Imposed Hundreds Of Millions Of Dollars In Fee Increases, Affecting Virtually Everyone In Massachusetts, While Insisting They Were Not New Taxes

Romney Imposed Over \$500 Million In Fee Hikes During His First Year In Office – More Than Any Other State That Year. “Massachusetts has picked up another dubious distinction: It has imposed more fee hikes than any other state this year...Of the 30 states the National Conference of State Legislatures found raised fees this year, only nine are bringing in \$100 million or more from those fee hikes. Massachusetts \$500 million boost even topped the \$367 million fee increase in New York, which has a much larger budget.” (Editorial, “We’re No. 1,” *Sunday Telegram*, 7/27/03)

- **Romney Insisted Fees Were Not Taxes:** “Practically no one is spared from dozens of new and increased state fees proposed Thursday by Gov. Mitt Romney, who insisted they are not taxes.” (Ken Maguire, “Governor Says Proposed New, Higher Fees Are Not Taxes,” *The Associated Press*, 2/27/03)

Romney’s Fees Cut Into The Benefits Ordinary Citizens Received From President Bush’s 2003 Tax Cuts. “If the Bush tax cuts revive the stalling economy they will do so in spite of the large fee increases levied by states across the U.S. with Massachusetts leading the way. If anything, these state fee increases not only diminish, but, for some people, even eliminate, the tax cuts passed by Congress and signed by the President.” (Christopher Boyd, “Fees Put A Crimp On Tax Cuts,” *Beacon Hill Institute’s NewsLink*, Vol. 8, No. 1, Fall 2003)

***Boston Globe:* Romney’s Fee Increases “May Have Enhanced [Massachusetts’] Reputation As ‘Taxachusetts.’”** “This time it’s fees, not taxes. Still, Massachusetts may have enhanced its reputation as ‘Taxachusetts.’ A survey of states grappling with spending crises has found that Massachusetts imposed more fee hikes than any other state in the nation this year - at least \$500 million. Governor Mitt Romney and the Legislature, faced with a multibillion dollar shortfall, made it more expensive to get a marriage license or a divorce, file a court case, buy a house, renew a driver’s license, or tap into a host of other state services.” (Rick Klein, “Mass. Is Called No. 1 In Fee Hikes,” *The Boston Globe*, 7/24/03)

Massachusetts Called “The Most Fee-Happy State In The Nation.” “With Massachusetts emerging as the most fee-happy state in the nation, lawmakers and advocates for groups targeted by fee hikes are lining up to push for some reversals. One bill would make the \$100 fee for carrying a firearm valid for life, instead of having to be renewed every four years. ‘It’s ridiculous,’ James L. Wallace, a spokesman for the Gun Owners Action League in Northboro...” (Shaun Sutner, “Fee Foes Begin Giant-Sized Fight In Legislature,” *Telegram & Gazette [Worcester, MA]*, 7/29/03)

Romney Claims He Raised Fees By Only \$260 Million In His First Year As Governor – A Claim Not Endorsed By His Then-Lieutenant Governor And Disputed By Experts And Media Outlets

In 2006, Romney Claimed He Only Raised Fees On Massachusetts Residents By \$260 Million During His First Year As Governor. “After his record was questioned in a televised debate, Gov. Mitt Romney yesterday plunged into the heat of a gubernatorial campaign he has largely avoided ... [Romney] was referring to accusations by Patrick that the Romney-Healey administration’s fiscal policies have resulted in \$900 million in new fees. ‘What planet does that come from?’ Romney asked, quickly handing reporters a spreadsheet showing fees were hiked \$260 million under his administration.” (Casey Ross, “Mitt Rages Against Debate Accusations,” *Boston Herald*, 9/27/06)

Romney’s Own Lieutenant Governor “Declined To Endorse” The Claim. “[Healey] called Patrick’s charge that the Romney-Healey administration raised taxes and fees by \$985 million ‘ridiculous,’ although she declined to endorse a \$260 million figure cited Tuesday by Gov. Mitt Romney.” (Casey Ross, “Gov Rivals Spar Over Taxing Topic,” *Boston Herald*, 9/28/06)

***Boston Herald*: Romney Figure “Does Not Account For The Full Amounts...”** “Romney’s \$260 million figure does not account for the full amounts raised by all the Kerry-Healey fee changes, which included hikes in licensing and court costs and other levies.” (Casey Ross, “Gov Rivals Spar Over Taxing Topic,” *Boston Herald*, 9/28/06)

Massachusetts Taxpayers Foundation’s Michael Widmer Also “Disputed Romney’s Figure Of \$260 Million.” “Michael Widmer, president of the Massachusetts Taxpayers Foundation, disputed Romney’s figure of \$260 million and agreed with Cato. Widmer recently served on Democratic Gov. Deval Patrick’s transition team, but he has also advised Republican governors.” (Alexander Bolton, “Romney’s Tax Record Gets A Closer Look,” *The Hill*, 3/28/07)

Romney’s Campaign Continues To Use \$260 Million Figure During Presidential Race, Adding That Data For Later Years Is “Not Available.” “Kevin Madden, Romney’s spokesman, said his boss raised fees by only \$260 million ... Another Romney aide said the \$500 million figure used an inflated Democratic estimate from 2003. The aide said fees actually increased only \$260 million between 2003 and 2004 but that data for later fiscal years were not available.” (Alexander Bolton, “Romney’s Tax Record Gets A Closer Look,” *The Hill*, 3/28/07)

Romney Denied Increased Fees Were Equivalent To New Taxes, But Experts Disagree

Romney Claimed Higher Fees Do Not Equal Higher Taxes, Saying Fees Are Levied In Return For Specific Services. “Romney makes a distinction between taxes and fees by describing fees as charges that are levied in return for specific services. Since the amount of the fee often covers the cost of a service, the governor has said he views fees as distinct from – and preferable to – broadly applied taxes on income or the sales of goods.” (Rick Klein, “Survey Results Call Massachusetts No. 1 In Fee Hikes,” *The Boston Globe*, 7/24/03)

While Romney Closed Budget Gap Without Raising Marginal Rates, “Some Tax Specialists ... Have Argued That Romney Effectively Raised Taxes” By Boosting Fees And Closing So-Called “Loopholes.” “Through trimming state government, raising fees on certain services, and ending corporate tax loopholes, Romney closed a budget gap of roughly \$1.7 billion. He boasts that he did so without raising taxes, but some tax specialists and other observers have argued that Romney effectively raised taxes by boosting the fees and eking more money out of corporations.” (Scott Helman, “Mixed Legacy: Health Plan, Jobs, Fee Hikes,” *The Boston Globe*, 1/4/07)

Beacon Hill Institute: “Raising Fees While Denying They Are Tax Increases Is A Political Sleight Of Hand.” (Christopher Boyd, “Fees Put A Crimp On Tax Cuts,” Beacon Hill Institute’s *NewsLink*, Vol. 8, No. 1, Fall 2003)

Factcheck.org: Romney’s Claim He “Did Not Raise Taxes” Is “Misleading.” “Mitt Romney said he ‘did not raise taxes’ when he was governor of Massachusetts, when in fact he increased state fees by hundreds of millions of dollars ... Technically, this is true, but it’s also misleading. Romney did not raise anything called a tax during his tenure as governor, but he did increase state revenues by raising various types of fees.” (“GOP Candidates Debate, Round 2,” www.factcheck.org, 5/16/07)

***Boston Herald*’s Thomas Keane: Fee Increases “Amount To Unwanted Impositions On Citizens.”** “The Romney budget really does contain \$1.4 billion of ... ‘revenue enhancements.’ And each of those enhancements will end up coming out of someone’s pocket. Government fees, taxes or whatever you wish to call them amount to unwanted impositions on citizens.” (Thomas M. Keane, Jr., Op-Ed, “Semantics Aside, You Still Pay For It,” *Boston Herald*, 3/5/03)

- **Keane: Some Of Romney's Fees Were "Broadly Based And Touch Virtually Everyone."** "Some of those charges ... are so narrowly drawn and so directly related to what's provided that we might view them in the same way we view charges for goods and services from the private sector. But others are broadly based and touch virtually everyone." (Thomas M. Keane, Jr., Op-Ed, "Semantics Aside, You Still Pay For It," *Boston Herald*, 3/5/03)

Romney Hiked Gun Licensing And Identification Card Fees

Romney Signed Budget Quadrupling Gun Fees: "Also drawing criticism is quadrupling of fees charged to gun owners this year. Under the budget, fees will rise from \$25 to \$100 for both a firearms identification card and a license to carry firearms, which are required by state law." (Casey Ross, "Fee Hikes More Than Nickels And Dimes," *The Patriot Ledger* [Quincy, MA], 7/9/03)

Romney Originally Proposed Tripling The Gun Fee. "Lawmakers, besides approving about \$80 million in fee hikes proposed by the governor -- including the gun fee, which they raised from the \$75 floated by the governor -- tacked on another \$74 million of their own." (Shaun Sutner, "Fee Foes Begin Giant-Sized Fight In Legislature," *Telegram & Gazette*, 7/29/03)

- **"The Fee Increases ... Will Make Massachusetts One Of The Most Expensive Places In The Nation To Own A Gun..."** (Casey Ross, "Fee Hikes More Than Nickels And Dimes," *The Patriot Ledger* [Quincy, MA], 7/9/03)

Gun Owners React: "It's A Tax On An Individual's Right To Bear Arms In Massachusetts ... Basically, We're Being Robbed." "The Gun Owners Action League said a proposed firearms registration fee increase ... is a tax. 'It's not a fee. It's a tax on an individual's right to bear arms in Massachusetts,' said Jim Wallace, a lobbyist for the group. 'Basically, we're being robbed.'" (Ken Maguire, "Governor Says Proposed New, Higher Fees Are Not Taxes," *The Associated Press*, 2/27/03)

Gun Owners Advocate: Government "Passing The Buck ... It Just Shows They Don't Have Any Answers." "In general, the government has failed to meet its obligations and now it's passing the buck," said Michael Yacino, executive director of the Gun Owners Action League, which has opposed the fee increases. 'It just shows they don't have any answers.'" (Casey Ross, "Fee Hikes More Than Nickels And Dimes," *The Patriot Ledger* [Quincy, MA], 7/9/03)

Romney Increased Fees on First Responders

Romney Proposed A New Fee On Volunteer Firefighters, Charging Them \$100 Fee For Flashing Vehicle Lights. "In another move, opponents of a \$100 biannual fee that Gov. Mitt Romney slapped on volunteer firefighters last spring have succeeded in getting the administration to rescind the fee. The charge, for the flashing blue and red lights that volunteers affix to their vehicles to identify themselves as emergency workers, will now only be charged if volunteers have more than one vehicle they use to get to incidents." (Shaun Sutner, "Fee Foes Begin Giant-Sized Fight In Legislature," *Telegram & Gazette* [Worcester, MA], 7/29/03)

State Doubled Certification Fees For Emergency Medical Personnel And Ambulances. "In April, the state, looking for new ways to raise revenue, doubled fees for EMT certification from \$75 to \$150 per person. Certification must be renewed every two years. Rates for certifying an ambulance equipped for basic life support doubled from \$200 to \$400. That certification must be renewed every two years. For an ambulance that offers advanced life support, the fee climbed from \$300 to \$600, and that certification must be renewed each year. The fee to have either of these vehicles inspected also doubled, going from \$100 to \$200." (Clare Leschin-Hoar, "Paying The Price For Safety," *The Boston Globe*, 7/24/03)

- **"The Fee Increases For Emergency Medical Units Apply To The Costs Of Certifying Ambulances As Well As EMTs."** (Clare Leschin-Hoar, "Paying The Price For Safety," *The Boston Globe*, 7/24/03)

Romney Proposed Increasing Fees On Hospitalized Veterans

State Sought To Increase User Fees For Long-Term Care At The Chelsea Soldiers' Home. "Gov. Mitt Romney is vehemently opposed to raising taxes. Yet new fees proposed in his budget would hit a broad spectrum of people ... The changes include ... increasing user fees for long-term care at the Chelsea Soldiers' Home." (Jennifer Fenn, "Romney Budget Raises Fees, Which Democrats Say Are Taxes In Disguise," *Lowell Sun*, 2/28/03)

- **The Chelsea Soldiers' Home/Quigley Memorial Hospital Is A State Run Veterans' Hospital With Acute, Long Term Care And Domiciliary Units.** "Eligible veterans are provided a dorm style room with full meal service. As Veterans need more care, they may progress to supervised programs with 24 hour nursing care

or may become eligible for Skilled Nursing Care placement on one of the eight inpatient skilled nursing units. We also have a secure Alzheimers' and Dementia Unit. End of Life care planning is multidisciplinary and individualized to meet the varied needs of the resident." (MA Commission on End Of Life Care, www.endoflifecommission.org, Accessed 2/9/07)

Romney Increased Fees To Record Common Real Estate Transactions

Increased Fees 337% For Recording Mortgages: "Last week, Governor Mitt Romney signed legislation that he filed to dramatically boost registry fees. Romney had asked for the fee hike to help cut the state budget gap and alleviate registry waiting times. Starting March 15, the fee to record a mortgage will go from \$40 to \$175..." (Thomas Grillo, "Deeds Office Extends Hours Due To Refinancing Boom," *The Boston Globe*, 3/9/03)

Increased Fees 178% To Record Deeds: "[I]t will cost \$125 to record a deed, up from \$45..." (Thomas Grillo, "Deeds Office Extends Hours Due To Refinancing Boom," *The Boston Globe*, 3/9/03)

Increased Fees 650% To Record Trusts: "[A] declaration of trust will increase from \$30 to \$225..." (Thomas Grillo, "Deeds Office Extends Hours Due To Refinancing Boom," *The Boston Globe*, 3/9/03)

Increased Fees 200% To Record Homestead Declaration: "[F]iling a homestead declaration to protect a homeowner's equity from creditors will increase from \$10 to \$30." (Thomas Grillo, "Deeds Office Extends Hours Due To Refinancing Boom," *The Boston Globe*, 3/9/03)

Romney Doubled Fees For Birth, Death And Marriage Certificates

Using Governor's Emergency Powers, Romney Doubled The Cost For Copies Of Birth, Marriage And Death Certificates. "[C]opies of birth, death and marriage certificates from the state Registry of Vital Records and Statistics in Boston will jump from \$6 to \$12, while copies over the phone or the Internet go from \$19.50 to \$39." (Dan Ring, "Fees: Romney Proposal Not Pleasing To Payers," *Springfield Union News*, 2/8/03; Yvonne Abraham, "Seeking Revenue," *The Boston Globe*, 1/31/03)

Romney Imposed Fee On Blind Citizens

Romney Charged Fee For Being Blind. "It now costs to be blind in Massachusetts. The state's approximately 35,000 blind and legally blind residents must now pay \$10 annually for a certificate of blindness and \$15 every four years for a blind identification card. Without the formerly free documents, blind people cannot take advantage of tax abatements, affordable housing programs, health care services, transportation discounts and other benefits. ... The fees originated in February, in Gov. Mitt Romney's budget proposal for fiscal 2004." (Shaun Sutner, "Advocates Fight Fees For The Blind," *Telegram & Gazette*, 8/5/03)

Romney Also Proposed Imposing A Fee On The Mentally Retarded. "The committee will also accept most of the fee recommendations made by Romney, Rogers said, but would not endorse ... a new fee for some mentally retarded citizens..." (Jennifer Peter, "House Leaders Agree With Romney's Plan To Eliminate Urban Park Agency," *The Associated Press*, 4/16/03)

Romney Advocated Higher Fees On Tuberculosis Testing

Romney Proposed New Fee For Tuberculosis Testing – And An Even Higher Fee For Testing Positive. "In Massachusetts, Gov. Mitt Romney (R) has proposed charging \$50 for tuberculosis tests – and wants to charge a \$400 fee when someone tests positive." (Michael Powell and Christine Haughney, "Wary Of Higher Taxes, Officials Boost Fees," *The Washington Post*, 4/7/03)

Romney Proposed Higher Fees On Host Of Recreational Activities

Golf, State Parks, Ice Skating And Summer Cottages Targeted. "Under Governor Mitt Romney's new user fee proposal, players at Canton's Ponkapoag Golf Course, owners of pondfront cottages in Plymouth and Carver's Myles Standish Forest, and visitors to Easton's Borderland State Park would help the state raise \$60 million to help cover its budget shortfall in the next fiscal year." (Judith Forman, "State Fee Plan Targets Golfers, Park Visitors," *The Boston Globe*, 3/13/03)

Proposed New Parking Fee At State Parks. "Among the dozens of proposed fee increases is a \$2 parking charge being added at 10 state parks, including Borderland State Park, which sits on the Sharon-Easton line, where the parking had been free." (Judith Forman, "State Fee Plan Targets Golfers, Park Visitors," *The Boston Globe*, 3/13/03)

Golf Season Passes And Daily Fees Increased. "According to Cahill, various season passes are set to be hit with increases ranging from \$50 to \$150. Daily golfing fees also would increase either \$5 or \$10. The fee hikes should take effect early next month, at the start of the golf season." (Judith Forman, "State Fee Plan Targets Golfers, Park Visitors," *The Boston Globe*, 3/13/03)

- **Costing More To Play Eighteen Holes:** "Romney has raised golf fees as part of his fiscal year 2004 budget package ... Weekday fees now range from \$17 to \$22 for 18 holes, and \$15 to \$17 for nine holes. Weekend fees are \$25 for 18 holes, \$17 for nine." (Judith Forman, "Legislature Overrides Veto, Restores Ponkapoag Funding" *The Boston Globe*, 7/13/03)

Group Skating Fees Were Also Eyed. "Hourly group skating fees at MDC rinks – including in Quincy, Weymouth, and Milton – also would rise between \$15 and \$40." (Judith Forman, "State Fee Plan Targets Golfers, Park Visitors," *The Boston Globe*, 3/13/03)

Proposed Doubling Of Cottage Fees. "Some of the fee changes, such as the proposal that targets pond-front cottages within Myles Standish State Forest, are steeper. Cahill said the current cottage fees (last set in 1989), which range from \$810-\$1,900 per season (Patriots' Day to Columbus Day), are set to double." (Judith Forman, "State Fee Plan Targets Golfers, Park Visitors," *The Boston Globe*, 3/13/03)

Romney Proposed Fee Increase On Driver's Permits

Romney's Plan: Double The Cost Of A Driving Permit. "Some fees would impact a small percentage of the state's citizens; others are more widespread. The governor would increase inmate phone charges at prisons from 86 cents to \$2, and hike the cost of a driving permit from \$15 to \$30. (Jennifer Fenn, "Romney Budget Raises Fees, Which Democrats Say Are Taxes In Disguise," *Lowell Sun*, 2/28/03)

Romney Proposed Hiking State Campus Tuition And Fees

Proposed \$50 Million In Fee And Tuition Hikes. "As part of an effort to save \$150 million in the state education budget, the administration has proposed raising \$50 million in new revenues from higher college fees and tuitions, and saving \$100 million in administrative costs through consolidations." (John Monahan, "Cuts Would Run Gamut," *Telegram & Gazette*, 2/27/03)

"Romney Estimated That Tuition Would Rise Between 5 And 15 Percent..." (Michael Norton, "Romney Lays Out His Priorities In Budget That Barely Boosts Overall Spending," *State House News Service*, 2/26/03)

In 2003, Romney Vetoed Annual Registration Fee For Sexual Offenders And Up To \$750,000 To Cut Down On Backlog Of Sex Offenders Not Classified By State

Romney Vetoed New \$75 Annual Fee For Sex Offender Registration – His Veto Was Overturned By The House. "Beacon Hill lawmakers overturned Gov. Mitt Romney's veto of \$23 million in additional state aid to cities and towns ... House lawmakers also overturned Romney's veto of a new \$75 annual fee for sex offenders when they renew their listing on the state's sex offender registry. ... Romney vetoed the fee, saying it would discourage sex offenders from renewing their registration." (Steve LeBlanc, "Legislature Restores State Aid To Local Communities, Sex Offender Fee," *The Associated Press*, 7/8/03)

Romney Also Vetoed Up To \$750,000 In Funding Aimed At Cutting Down Backlog Of Sex Offenders Not Yet Classified By State – Veto Overturned By House. "Another section of the budget, also vetoed by Romney, would use up to \$750,000 collected from the new [sex offender] fees to cut down on the current backlog of sex offenders yet to be classified by the state. The House overturned that veto too." (Steve LeBlanc, "Legislature Restores State Aid To Local Communities, Sex Offender Fee," *The Associated Press*, 7/8/03)

Lt. Gov. Kerry Healey (R) Disagreed With Romney Vetoes On Sex Offender Registration Fee And Classification Backlog Funds. "[Healey] said she disagreed with Romney's decision in 2003 to veto a \$75 fee that would have been imposed on convicted sex offenders. She also said she disagreed with another veto to spend \$750,000 collected from the fees to reduce a backlog of sex offenders waiting at the time to be classified by the state. The Legislature overrode those vetoes. ... 'No, I did not,' Healey said when asked if she supported Romney's vetoes." (Glen Johnson, "Healey Signs Sex Crimes Statute Extension Into Law," *The Associated Press*, 9/21/06)

In November 2003, Investigation Found State Had Lost Track Of One-Third Of Worst Sex Offenders. "The Romney administration plans to conduct a monthlong 'intensive sweep' for unregistered sex offenders using the

state police's fugitive hunting squad, officials said yesterday. ... [The] announcement comes in the wake of an investigation by Boston Herald and Fox 25 that found about one-third of Massachusetts' high-risk offenders – categorized as Level 3 – are skirting the sex offender registry law by providing phony or outdated addresses to the state's Sex Offender Registry Board.” (Jack Meyers and Jonathan Wells, “Round ‘Em Up,” *Boston Herald*, 11/7/03)

Legislature Immediately – And Unanimously – Overturned Romney Veto Of \$240,000 In Funding For Sex Offender Registry Board. “Authorities would get an extra \$240,000 this year to help track the state's worst sex offenders, under a measure approved Thursday by the House, whose Democratic leaders took issue with criticism from Gov. Mitt Romney. The unanimous vote was an override of one of Romney's vetoes ... The vote comes days after an investigation by Boston Herald and WFX-TV showed that Massachusetts has lost track of about one-third of its worst sex offenders because of false or outdated information about their home and work addresses.” (Ken Maguire, “House Approves Funds To Track Sex Offenders,” *The Associated Press*, 11/6/03)

Romney Vetoed Provision Requiring Sexual Offenders To Pay \$75 Registration Fee. “Gov. Mitt Romney signed the state's \$23.8 billion budget into law on Thursday, but vetoed about \$110 million dollars in spending that he deemed ineffective or wasteful. ... Romney also got rid of a \$75 fee that sexual offenders would have been required to pay when they registered with the state.” (Theo Emery, “Governor Signs Budget, But Strips About \$110 Million,” *The Associated Press*, 6/30/05)

State Legislature Upheld Romney's Veto. “Lawmakers let stand Romney's veto of a \$75 fee that sexual offenders would have been required to pay when they registered with the state. The administration said the fee would have discouraged offenders from registering.” (“House And Senate Override Romney Budget Vetoes,” *The Associated Press*, 7/20/05)

Weeks Before Leaving Office, Romney Again Cut The Budget Of The Sex Offender Registry Board. “In a final splash before leaving the corner office, Gov. Mitt Romney yesterday slashed \$425 million from the current year's budget, saying the Legislature's irresponsible spending left him no choice. ... Included in Romney's cuts are several items that Lt. Gov. Kerry Healey -- who ran for governor on public safety issues -- would likely have objected to prior to Election Day: funding for the state police crime lab, the Sex Offender Registry Board...” (Rebecca Fater, “Romney Slashes State's Spending,” *The Berkshire Eagle*, 11/11/06)

BUSH TAX CUTS

Romney Refused To Endorse Bush Tax Cuts, Now Embraces Them

After Refusing To Endorse Bush Tax Cuts, Romney Now Making Them “A Central Part Of His Presidential Campaign.” “After refusing to endorse President Bush's tax cuts when he was governor, Mitt Romney has now made them a central part of his presidential campaign, stirring accusations that he is changing his position to appeal to GOP primary voters.” (Casey Ross, “Mitt Changes Tax-Cut Tune,” *Boston Herald*, 2/8/07)

- **Romney Claims “I Supported” Bush Tax Cuts.** “McCain opposed President Bush's tax cuts, Romney noted. ‘I supported them,’ the former governor said.” (Lee Bandy, “Romney Targeting McCain,” *The State [SC]*, 2/4/07)

***Boston Herald*: Romney “Refused To Take A Position On Bush's Massive, 10-Year Tax Cut Plan.”** “[R]omney spoke at the 10th annual legislative conference organized by U.S. Rep. Martin T. Meehan (D-Lowell) and met with the Massachusetts delegation. ... Congressional sources said that a point of contention arose when Romney refused to take a position on Bush's massive, 10-year tax cut plan. Lawmakers told him that the state is unlikely to get the additional homeland security funds they and the governor are requesting because the money will go to the tax cut. But Romney would not discuss the matter, sources said.” (Noelle Straub, “Romney Talks Policy With Bush Staffers, Mass. Delegation,” *Boston Herald*, 4/11/03)

- **Romney “Stunned” Massachusetts Congressmen In 2003 “Telling Them That He Would Not Publicly Support Bush's Tax Cuts.”** “In 2003, Romney stunned a roomful of Bay State congressmen by telling them that he would not publicly support Bush's tax cuts, which at the time formed the centerpiece of the president's domestic agenda. He even said he was open to a federal gas tax hike.” (Casey Ross, “Mitt Changes Tax-Cut Tune,” *Boston Herald*, 2/8/07)
- **Rep. Barney Frank (D-MA):** “I was very pleased [Romney did not endorse the tax cuts] ... Here you have a freshman governor refusing to endorse a tax cut presented by a Republican president at the height of his wartime popularity.” (Wayne Washington and Glen Johnson, “Romney Weighs In – Carefully – On Bush Tax-Cut Plan,” *The Boston Globe*, 4/11/03)

Romney Said He Wouldn't Be "Cheerleader" For Tax Relief Plan He Didn't Agree With. "According to the observer, who spoke on condition of anonymity, Romney told the delegation that he 'won't be a cheerleader' for proposals he doesn't agree with, 'but I have to keep a solid relationship with the White House.'" (Wayne Washington and Glen Johnson, "Romney Weighs In – Carefully – On Bush Tax-Cut Plan," *The Boston Globe*, 4/11/03)

"Shawn Feddeman, Romney's Spokeswoman, Said The Governor Has Neither Endorsed Nor Opposed The Tax Cut Plan Because 'It's Just Not A State Matter.'" (Wayne Washington and Glen Johnson, "Romney Weighs In – Carefully – On Bush Tax-Cut Plan," *The Boston Globe*, 4/11/03)

"Since Taking Office ... Romney Has Been Reluctant To Voice Support Or Opposition To The President's Tax Cut Proposals." (Wayne Washington and Glen Johnson, "Romney Weighs In – Carefully – On Bush Tax-Cut Plan," *The Boston Globe*, 4/11/03)

Romney Said He'd Let All-Democrat Congressional Delegation "Sort That Out." "Pressed further, [Romney] said, 'I don't wade into national politics. I will let our delegation sort that out.'" (Wayne Washington and Glen Johnson, "Romney Weighs In – Carefully – On Bush Tax-Cut Plan," *The Boston Globe*, 4/11/03)

JOBS AND ECONOMY

Under Romney, Massachusetts Dramatically Underperformed The Nation In Terms Of Job Growth

Massachusetts Added Roughly 32,000 Jobs During Romney's Tenure. Employees on seasonally adjusted nonfarm payroll increased from 3,225,900 when Romney took office in January 2003 to 3,258,000 in December 2006 – a net of approximately 32,100 more jobs, which represented an increase of slightly under 1.0% from Romney's first month. (Bureau Of Labor Statistics Website, www.bls.gov, Accessed 5/29/07)

CURRENT EMPLOYMENT STATISTICS - Geographic Area: Massachusetts; Industry: Total Nonfarm; Time Frame: 2003-2006 (in thousands)													
Year	Description	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2003	TOTAL NONFARM	3,225.9	3,209.6	3,203.9	3,201.1	3,203.5	3,196.2	3,194.8	3,193.2	3,196.9	3,188.4	3,187.1	3,178.9
2004	TOTAL NONFARM	3,182.3	3,185.7	3,190.7	3,193.3	3,193.5	3,193.6	3,201.6	3,197.6	3,199.8	3,199.9	3,199.3	3,199.9
2005	TOTAL NONFARM	3,196.8	3,206.1	3,196.9	3,209.1	3,209.1	3,208.4	3,216.6	3,216.8	3,219.7	3,214.0	3,221.4	3,223.3
2006	TOTAL NONFARM	3,230.5	3,232.2	3,236.0	3,236.8	3,237.9	3,245.5	3,246.1	3,247.4	3,247.2	3,249.2	3,256.0	3,258.0

During Same Time Period, The Rest Of The Country Added Over 6.9 Million Jobs – Roughly Five Times The Rate Of Massachusetts. From January 2003 through December 2006, the U.S. economy grew from roughly 130,256,000 nonfarm jobs – seasonally adjusted – to roughly 137,167,000 jobs, an increase of 6,911,000 jobs, or 5.3%. (Bureau Of Labor Statistics Website, www.bls.gov, Accessed 5/29/07)

CURRENT EMPLOYMENT STATISTICS - Geographic Area: National; Industry: Total Nonfarm; Time Frame: 2003-2006 (in thousands)													
Year	Description	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2003	NONFARM	130,256	130,103	129,907	129,859	129,826	129,850	129,860	129,818	129,899	130,075	130,130	130,298
2004	NONFARM	130,412	130,443	130,786	131,073	131,342	131,444	131,503	131,610	131,780	132,130	132,195	132,363
2005	NONFARM	132,458	132,693	132,817	133,157	133,345	133,610	133,937	134,139	134,244	134,351	134,702	134,904
2006	NONFARM	135,110	135,410	135,659	135,803	135,906	136,030	136,252	136,438	136,636	136,745	136,941	137,167

Former Gov. Michael Dukakis (D) Far Exceeded Romney's Record On Creating Jobs

Massachusetts Added Roughly 407,600 Jobs During Michael Dukakis' Final Two Terms In Office, An Increase Of Nearly 16%. Employees on seasonally adjusted nonfarm payroll increased from 2,580,100 when Dukakis took office in January 1983 to 2,987,700 in December 1990 – a net of approximately 407,600 more jobs, which represented an increase of roughly 15.8% from Dukakis's first month. (Bureau Of Labor Statistics Website, www.bls.gov, Accessed 5/29/07)

CURRENT EMPLOYMENT STATISTICS - Geographic Area: Massachusetts; Industry: Total Nonfarm; Time Frame: 1983-1990 (in thousands)													
Year	Description	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1983	NONFARM	2,580.1	2,592.7	2,625.4	2,662.3	2,692.9	2,726.3	2,696.5	2,693.3	2,747.7	2,760.2	2,778.4	2,801.7
1984	NONFARM	2,736.4	2,759.2	2,785.0	2,823.1	2,856.5	2,897.4	2,862.3	2,880.8	2,895.4	2,906.8	2,925.0	2,942.1

1985	NONFARM	2,848.7	2,861.2	2,887.8	2,919.4	2,945.2	2,974.3	2,925.3	2,936.0	2,945.1	2,962.8	2,977.3	2,990.9
1986	NONFARM	2,911.0	2,923.1	2,943.4	2,982.0	3,004.4	3,025.4	2,989.7	2,995.9	3,012.0	3,024.3	3,038.3	3,055.1
1987	NONFARM	2,966.7	2,984.5	3,004.6	3,052.6	3,078.8	3,115.4	3,083.8	3,085.9	3,093.2	3,111.8	3,126.0	3,150.6
1988	NONFARM	3,049.0	3,069.2	3,102.3	3,124.4	3,141.3	3,181.7	3,142.7	3,142.0	3,161.8	3,165.2	3,179.4	3,199.6
1989	NONFARM	3,090.0	3,098.3	3,116.4	3,125.8	3,143.4	3,183.3	3,125.4	3,108.7	3,113.8	3,095.6	3,101.1	3,116.0
1990	NONFARM	2,985.0	2,989.2	3,000.5	2,998.9	3,024.9	3,040.3	2,975.9	2,969.8	2,986.5	2,966.6	2,960.7	2,953.9

ROMNEY ON MASSACHUSETTS BUDGET

Romney Often Touts Achievements On Budget Issues In Massachusetts, Fails To Tell Whole Story

A Staple Of Romney's Stump Remarks: "Mr. Romney, who said he inherited a \$3 billion deficit when he became governor of Massachusetts, said he balanced the state budget without raising taxes or increasing debt." (Betsy Gilliland, "Romney Talks Of Challenges, Strengths," *The Augusta [Ga.] Chronicle*, 1/30/07)

Boston Globe: Romney Boasts About Budget Record "Incomplete And, In Some Ways, Inaccurate." "It is the first line on Governor Mitt Romney's resume as a potential presidential candidate. He closed Massachusetts' \$3 billion budget gap by cutting government waste instead of by raising taxes, he tells Republican audiences from New Hampshire to California. He says he saved money by shrinking the public workforce and eliminating superfluous agencies. And, Romney boasts, he protected education from the budget ax. ... But his pitch includes some assertions and omissions that leave his audiences with an incomplete and, in some ways, inaccurate picture of what really happened here." (Scott Greenberger, "Romney Often Casts Himself As Budget Hero," *The Boston Globe*, 10/24/05)

Romney's "\$3 Billion Deficit" Never Materialized

Romney's Oft-Referenced \$3 Billion Deficit Never Materialized. "[T]he \$3 billion budget gap Romney cites never materialized. It was a prediction the administration and lawmakers made shortly after Romney took office in January 2003." (Scott Greenberger, "Romney Often Casts Himself As Budget Hero," *The Boston Globe*, 10/24/05)

Eventual Revenue Numbers Show Romney Faced A Deficit Almost Half The Size He Claims. "Even before Romney unveiled his budget proposal at the end of February 2003, the state Department of Revenue and outside analysts said the \$3 billion figure was rooted in revenue projections that were much too low. Before the year was up, a windfall in capital gains taxes helped cut the \$3 billion shortfall by about \$1.3 billion." (Scott Greenberger, "Romney Often Casts Himself As Budget Hero," *The Boston Globe*, 10/24/05)

Romney Left State Budget Unbalanced, Saddling His Successor With "Whopping" \$1.3 Billion Deficit

Romney Left Massachusetts With \$1.3 Billion Deficit After His Term In Office. "The [Patrick Administration's] budget also resolves the whopping \$1.3 billion deficit left by the Romney Administration." (Adrian Walker, Op-Ed, "A Numbers Roadshow," *The Boston Globe*, 3/1/07)

In November 2006, Romney Aides Were Privately Telling Incoming Governor To Expect Deficit As High As \$1.1 Billion. "Patrick aides said Romney administration officials had been painting a grim picture of state finances in private meetings last month and this month. In the Nov. 27 presentation to Patrick's budget advisers, Romney aides projected a budget deficit for fiscal 2008, which begins in July, of between \$400 million and \$1.1 billion." (Andrea Estes and Michael Levenson, "State Could Face \$1b Deficit In '07," *The Boston Globe*, 12/30/06)

Fitchburg Sentinel & Enterprise On Romney: "Precious Few Accomplishments ... Looks Like State Lawmakers Will Face Another Deficit." "[H]e promised to finish the job he started. But in the end, he failed to live up to that promise. ... There's no doubt Romney will tout his record as the Commonwealth's chief executive, but he has precious few accomplishments to point to. The biggest thing Romney did was balance the state budget, even though it looks like state lawmakers will face another deficit in fiscal year 2008." (Editorial, "Romney Hasn't Proven He Could Be President," *Sentinel & Enterprise* [Fitchburg, MA], 1/7/07)

Romney's Government "Reforms" Panned As Largely Ineffective

Romney's Vaunted Consolidation Of State Agencies "Saved Relatively Little Money." "In his out-of-state speeches, Romney suggests that the consolidation of state agencies was a major factor in closing the budget gap. But those changes saved relatively little money: Folding 16 human-services agencies into four, a change Romney often cites outside the state, saved about \$7 million, according to the administration. Eliminating the

Metropolitan District Commission saved about \$3.5 million, according to the Massachusetts Taxpayers Foundation, a business-funded nonprofit group that monitors state spending.” (Scott Greenberger, “Romney Often Casts Himself As Budget Hero,” *The Boston Globe*, 10/24/05)

- **Michael Widmer Of The Massachusetts Taxpayers Foundation:** “No Romney reform has saved any meaningful money. It’s all on the margins. The have no connection to the closing of the [budget] gap...” (Scott Greenberger, “Romney Often Casts Himself As Budget Hero,” *The Boston Globe*, 10/24/05)

Romney’s Supposed “\$2 Billion” In “Waste And Inefficiency ... Didn’t Really Exist.” “One year into his four-year term, Governor Romney has a long way to go to deliver on most of his campaign promises. Not long after taking office, he had to admit that the \$2 billion in ‘waste and inefficiency’ he decried so often during the campaign didn’t really exist. And while he won the fight with the Legislature over holding the line on taxes, fees went up \$500 million.” (Tom Benner, “Romney Promises Collide With Reality,” *The Patriot Ledger* [Quincy, MA], 12/27/03)

STATE ECONOMY FALTERED UNDER “C.E.O. GOVERNOR”

Massachusetts Was Only State With Three Straight Years Of Shrinking Labor Force From 2003-05

Massachusetts Labor Force Contracted By 1.7% Between 2003 And 2005 – Only State In Nation With Three Straight Years Of Decline – While National Labor Force Expanded By 3.1%. “In the most recent three years (2003-2005), the Massachusetts labor force contracted by 1.7%, and it was the only state in the nation to decline each year during this time period. The nation’s labor force expanded by 3.1%.” (MassINC and Center For Labor Market Studies Report, “Mass Economy: The Labor Supply And Our Economic Future,” 12/06)

- **From 2000-05, Massachusetts Labor Force “Did Not Grow At All.”** “From 2000 to 2005, the Massachusetts resident labor force did not grow at all, while the national labor force grew by nearly 5%. On this measure, Massachusetts ranked 48th lowest among the 50 states.” (MassINC and Center For Labor Market Studies Report, “Mass Economy: The Labor Supply And Our Economic Future,” 12/06)

State On Track For Fourth Consecutive Year Of Shrinking Labor Force, “Unprecedented For Massachusetts In The Post-World War II Era.” “The most recent data suggest that the state might be heading for its fourth consecutive year of a shrinking labor force, which would be unprecedented for Massachusetts in the post-World War II era.” (MassINC and Center For Labor Market Studies Report, “Mass Economy: The Labor Supply And Our Economic Future,” 12/06)

Massachusetts Is Only State In New England With No Labor Force Growth Since 2000. “Since 2000, the labor force experiences of Massachusetts have contrasted sharply with the rest of New England. The Massachusetts labor force was the only one not to grow, while the labor forces in all the other New England states grew between 4.6% (CT) and 6.0% (VT).” (MassINC and Center For Labor Market Studies Report, “Mass Economy: The Labor Supply And Our Economic Future,” 12/06)

Massachusetts Was Only State To Lose Population Two Years In A Row In Early Part Of Decade

2003-05: Massachusetts Lost 120,000 Workers And 233,000 Residents. “Between 2003 and 2005, Massachusetts exported 120,000 workers to other states. ... From 2000 to 2005, the state lost, on net, 233,000 residents to other states. In relative terms, the state lost 3.6% of its 2000 population. Relative to our state’s population, this level of outmigration was the 2nd highest in the nation, trailing only New York.” (MassINC and Center For Labor Market Studies Report, “Mass Economy: The Labor Supply And Our Economic Future,” 12/06)

“According To US Census Bureau Estimates, Massachusetts Is The Only State In The Nation To Lose Population For Two Years In A Row.” (CommonWealth Magazine Website, “CommonWealth Agenda 2006: Demographic Change,” www.massinc.org, Accessed 2/4/06)

Massachusetts’ Leadership Of Modern Innovation Economy Threatened

December 2006 Report Found That Massachusetts “Continues To Lose Its Grip As One Of The Nation’s Leaders” In Innovation Economy. “Despite some promising signals of improvement, the Bay State innovation economy continues to lose its grip as one of the nation’s leaders, beset by competition from other states and outpourings of key workforce demographics, a new report finds. The Massachusetts Technology Collaborative’s innovation economy index says flattening federal assistance for research and development combined with the venture capital industry veering away from risky start-ups have reduced cash flow into the state’s economy, at the

same time that other states work harder to compete for the same fund.” (Jim O’Sullivan, “Study: Workforce Needs Still A Challenge For Innovation Sectors,” *State House News Service*, 12/18/06)

- **High-Tech Sector Lagging Behind:** “[T]he new report warns that Massachusetts lags in restoring high-wage jobs lost in the technology bust early this decade in key industry sectors. It also suggests that migration out of the state is undermining the size and quality of the high-technology workforce – leaving Massachusetts poorly equipped to capitalize on new technologies.” (Robert Weisman, “Report Calls Mass. A New-Jobs Laggard,” *The Boston Globe*, 12/18/06)

Massachusetts’ Job Growth In Technology “Is Alarmingly Slow.” “[E]ven though there are recent signs of a modest jobs recovery in some key clusters, the growth in employment in the majority of these clusters is alarmingly slow when compared to the other [leading technology states].” (Massachusetts Technology Collaborative, “Index Of The Massachusetts Innovation Economy,” www.masstech.org, 12/06)

Massachusetts Innovation Economy “Is Burdened By Stagnant Employment Growth In Key Industry Clusters, Persistent Emigration, And A Progressively Limited Workforce.” “The Massachusetts Innovation Economy is burdened by stagnant employment growth in key industry clusters, persistent emigration, and a progressively limited workforce. Massachusetts has rebounded more slowly than competing [leading technology states] in the aftermath of the 2001 economic downturn. The after effects of the post dot-com downturn have finally fully cleared and there is some promising evidence of an ongoing recovery. Yet this progress may prove to be fleeting unless the Commonwealth can respond to the challenge by maintaining adequate human resources with the skills to sustain and augment this growth.” (Massachusetts Technology Collaborative, “Index Of The Massachusetts Innovation Economy,” www.masstech.org, 12/06)

Massachusetts Innovation Economy “Is Jeopardized By Pervasive Population Loss And A Genuine Concern About The Loss Of Key Skill Levels As Critically Important Demographic Groups Continue To Migrate Out-Of State.” “The Massachusetts research and innovation infrastructure of world-class institutions and universities is steadfast, the venture capital community thrives, and emerging global markets hold great promise. But the fundamental element that has traditionally sustained the Massachusetts economy in times of uncertainty – a highly capable and available workforce – is jeopardized by pervasive population loss and a genuine concern about the loss of key skill levels as critically important demographic groups continue to migrate out-of state. As a result of this thinning workforce, Massachusetts may find itself sub-optimally equipped to capitalize on the next economic wave, whether fueled by advances in nanotechnology, the life sciences, the Web 2.0 and e-commerce, renewable energy, or other emerging industries or clusters.” (Massachusetts Technology Collaborative, “Index Of The Massachusetts Innovation Economy,” www.masstech.org, 12/06)

Romney “Has Fallen Short” On Issues Of Economic Development And Job Creation

“Paul Harrington, An Economist At The Center For Labor Market Studies At Northeastern University, Agreed That Romney, With A Strong Business Background, Has Fallen Short On The Issue Of Economic Development.” (Brian C. Mooney, “Criticizing Romney On Jobs, Patrick Often Stretches The Truth,” *The Boston Globe*, 10/25/06)

- **Harrington:** “We elected a business guy, but he did not undertake the economic business of the state...” (Brian C. Mooney, “Criticizing Romney On Jobs, Patrick Often Stretches The Truth,” *The Boston Globe*, 10/25/06)
- **Harrington:** “I think you’ve got to just say that on the development side, we didn’t get the job done in the state.” (Stephanie Ebbert, “Bay State Exodus Second Only To New York,” *The Boston Globe*, 4/20/06)
- **Harrington:** “We’re among the poorest performing states in the country in terms of our ability to recover [economically]. The state of Rhode Island did pretty well over this period of time. They had a governor down there that worked hard at the business of job creation ...” (Stephanie Ebbert, “Bay State Exodus Second Only To New York,” *The Boston Globe*, 4/20/06)

Waltham Daily News Tribune: “For All Mitt Romney’s Capitalist Credentials, His Administration Didn’t Bring Home Many Jobs.” (Editorial, “Patrick Tabs A Permitting ‘Ombudsman,’” *The [Waltham] Daily News Tribune*, 1/25/07)

Nation Has Added Jobs At Four Times Rate Of Massachusetts Since Third Quarter Of 2003. “Since the third quarter of 2003, the nation has added jobs at four times the rate Massachusetts did, said [Northeastern University economist Paul] Harrington.” (Stephanie Ebbert, “Bay State Exodus Second Only To New York,” *The Boston Globe*, 4/20/06)

Massachusetts Has “Become An Underperformer In Job Creation.” “Massachusetts remains a magnet for research funds and venture capital, but it’s become an underperformer in job creation. And while the state continues to lead in many categories of research and development, other technology-oriented states are closing the gap. Those were some of the conclusions from the 10th annual Index of the Massachusetts Innovation Economy, set to be released today by the Massachusetts Technology Collaborative’s John Adams Innovation Institute, a state-chartered group focused on the knowledge economy.” (Robert Weisman, “Report Calls Mass. A New-Jobs Laggard,” *The Boston Globe*, 12/18/06)

Under Romney, Massachusetts Lost Major Employers Like Gillette And Fleet While Others Cut Jobs

Romney Blasted For Not Living Up To Campaign Promises As Major Employers Left State. “[Romney] bragged as CEO he’d bring corporations and jobs to Massachusetts and belittled Shannon O’Brien for not knowing what he knew. While Mr. CEO was governor, major employers such as Gillette, Hancock, Fleet, Reebok were bought by out-of-town goliaths.” (Dan Payne, Op-Ed, “Memo To Candidates For Governor, Re: Debate,” *The Boston Globe*, 5/18/06)

- **During 2002 Campaign, Romney Said “I Speak The Language Of Business,” Pledged To Meet With CEOs And “Fight For Every Job.”** “‘I speak the language of business,’ Mitt Romney assured voters on his campaign stops. This candidate said he would hit the road, reaching out to his fellow titans of commerce. He would meet with CEOs. He would sell the Massachusetts business climate. He would ‘fight for every job.’” (Adrian Walker, Op-Ed, “Jobs Pledge Looks Broken,” *The Boston Globe*, 3/22/04)
- **Romney In 2002: “I’m Looking Forward To Being The State’s Most Active Salesman.”** “My background in business means that most of my career I’ve been out asking companies for money – buy my product, buy my service, be my sponsor at the Olympics ... I’m looking forward to being the state’s most active salesman, out there banging on doors, come to Massachusetts, look what we have for you, come use our convention center, come locate your factory here, here’s how we’ll get you in here.” (Tom Benner, “Campaign 2002,” *The Patriot Ledger*, 5/29/02)

Boston Herald: “No Longer Can Boston Be Called A True Corporate-Headquarters Town. ... The Reason: There Are Simply Too Few Of Those Jobs Around. And Too Few Large Companies.” “That’s it. Yesterday’s announcement that Adidas is buying Reebok – after a slew of other takeovers of major Hub-area public corporations – marks a ‘paradigm shift’ in Boston’s historic economic profile and the very nature of its work force, economists and business leaders agree. No longer can Boston be called a true corporate-headquarters town. No longer is it as attractive a place for many university graduates to stay if they aspire to middle-management and top-echelon executive jobs – from human resources to accounting positions – within major public corporations. The reason: There are simply too few of those jobs around. And too few large companies.” (Jay Fitzgerald, “Paradigm Shift For Boston’s Economy,” *Boston Herald*, 8/4/05)

In 2006, Boston-Based Fidelity Investments Announced It Would Move 1,500 Jobs Out Of Massachusetts. “Fidelity Investments said yesterday it plans to move up to 1,500 jobs out of Massachusetts by 2008, a step likely to reignite a regional development rivalry among New England states. Fidelity spokeswoman Anne Crowley said the mutual-fund giant told roughly 800 employees of its personal investments group that their jobs will move to locations in Rhode Island in stages by 2008.” (Ross Kerber, “Fidelity To Shift Jobs From State,” *The Boston Globe*, 1/6/06)

In 2005, Cincinnati-Based Procter & Gamble Bought Gillette, 6,000 MA Job Cuts Expected. “Cincinnati-based Procter & Gamble’s \$57 billion deal to buy Gillette, a century-old corporate mainstay in Boston, has brought together such brands as P&G’s Tide detergent, Crest toothpaste and Pampers diapers with Gillette’s razors and Duracell batteries. The deal, which closed Oct. 1, is expected to lead to 6,000 job cuts across the combined company’s work force of 140,000, with some of the reductions likely to come at Gillette’s Boston headquarters.” (Mark Jewell, “Dealmaking Continued To Dominate State’s Business News In 2005,” *The Associated Press*, 12/26/05)

- **Romney Reacts: “That’s Very Unfortunate.”** “I understand that there are going to be a lot of job losses. That’s very unfortunate ... I wish I had the power to prevent this acquisition from occurring. I don’t.” (Ann E. Donlan, “Biz-Savvy Gov: Merger Is ‘Real Shame’ For Workers,” *Boston Herald*, 2/29/05)

In 2003, Charlotte-Based Bank Of America Bought FleetBoston. “Boston will lose its last major hometown bank once a \$47 billion deal made public yesterday closes and Bank of America walks off with FleetBoston Financial Corp. That rattled political leaders from City Hall to the State House yesterday, while rumors of major job cuts quickly began circulating inside Fleet. Bank of America, of Charlotte, N.C., said it had agreed to buy

Boston-based Fleet, New England's largest bank, for \$45 a share, a nearly 42 percent premium over Fleet's closing price of \$31.80 Friday." (Jon Chesto, "Fleet Sale Surprises Hub," *Boston Herald*, 10/28/03)

FOREIGN POLICY

EXECUTIVE SUMMARY

- Romney has no foreign policy experience.
- Though generally described as a supporter of the president's policy in Iraq, Romney came under fire in April 2007 for advocating "secret" withdrawal timetable similar to proposal by Sen. Mark Pryor (D-AR).
- In June 2007, Romney stepped up his criticism of the Bush Administration's Iraq policy by publicly denouncing the White House's comparison of future troop presence in Iraq to our current presence in South Korea.
- Romney hedged on endorsing troop surge and has been criticized for not talking enough about Iraq.
- During June 2006 presidential debate, Romney incorrectly claimed weapons inspectors were not allowed to enter Iraq before the 2003 U.S. invasion.
- When Romney finally endorsed the president's troop surge proposal, he unintentionally endorsed larger surge than was proposed by calling for extra regiment in Anbar province.
- Romney said capturing Osama bin Laden would result in "very insignificant increase in safety" for America and such effort was "not worth moving heaven and earth and spending billions of dollars" to catch one person.
- After calling for economic divestment from Iran, Romney was embarrassed by revelation that the Italian branch of Bain & Company – firm where Romney started as young consultant and served as CEO in early '90s – received \$2.3 million contract from National Iranian Oil Company in 2004.
- Bain Capital, the private equity firm that made Romney his fortune, currently owns a chemicals and paint company called SigmaKalon that operates an office in Tehran.
- Romney has made favorable comments about plan offered by Sen. Joe Biden (D-DE) to split Iraq into thirds.
- Romney has proposed doubling the size of the Guantanamo Bay detention facility and supports "enhanced interrogation techniques."
- Romney called Cuban president Fidel Castro a "monster" and has taken hard line against the dictator, but mistakenly employed signature Castro slogan while speaking to largely Hispanic audience in Miami this year.
- Romney praised 2005 plan by Citgo Petroleum Corp. – ultimately controlled by the Venezuelan government and President Hugo Chavez – to provide low-income Massachusetts residents with discounted heating oil.

EXPERIENCE

Romney's Foreign Affairs Resume Is Extremely Thin, Leading To Credibility Problems

Romney "Lacks Any Background In The Military Or Foreign Policy." "Though Romney has devoted considerable time in the campaign to national security – including a major speech Thursday in New York City on the threat of nuclear terrorism – the one-term governor lacks any background in the military or foreign policy." (Jonathan Martin, "McCain Hits Romney On Bin Laden Comment," Politico.com, 4/28/07)

Romney Traveled Extensively In 2006 – Including Self-Funded Asian Trip – To Burnish Foreign Policy Credentials. "Earlier this month [Romney] made a political trip through the South, before using personal money to fund a fact-finding trip to Japan, South Korea and China. He added to his foreign credentials this year with trips to Guantanamo Bay, Cuba, Iraq and Afghanistan." (Glen Johnson, "Romney Set For Presidential Announcement," *The Associated Press*, 12/22/06)

In December 2006 Trip To China, Romney "Stumbled Over Relatively Straightforward Geopolitical Issues," Did Not Know Value Of Chinese Currency. "The students asked Romney about his potential

presidential run, his views on Iraq, and banking and trade issues. At times, Romney stumbled over relatively straightforward geopolitical issues: Romney had to ask the US Embassy staff accompanying him the value of the Chinese renminbi to the US dollar, despite the fact that this is one of the hottest economic issues between Washington and Beijing.” (Jehangir S. Pocha, “Romney Tries Political Hand In China,” *The Boston Globe*, 12/9/06)

***The Associated Press* Noted “Perilous Results” Of Romney’s “Checklist” Approach To Foreign Policy.**

“As Mitt Romney transitions from one-term governor to presidential candidate, he has been ticking through a presidential checklist, sometimes with perilous results. Where he lacked foreign policy experience, his staff arranged one-day visits to Iraq, Afghanistan and Guantanamo Bay, Cuba. Check, check, check.” (Glen Johnson, “Romney Finds Peril As He Works Through Presidential Checklist,” *The Associated Press*, 3/25/07)

 Romney Refers To Current Affairs Books He Has Read When Discussing His Evaluation Of Iraq War.

“[W]e had major problems in the way we managed the war ... It was underplanned, underprepared, understaffed, too low a level of troops, undermanaged. ... [I]f you read *Cobra II* and *Assassins Gate* and *Looming Tower* and some of the reports of events leading up not only to 9/11 but to the conflict itself, there’s a sense that we weren’t ready for the post-major conflict period. And that has resulted in a blossoming of the sectarian violence, of insurgents...” (ABC’s “This Week,” 2/18/07)

***The Economist* Noted No Enthusiasm For Foreign Policy Speech At Bush Presidential Library, Suggesting Romney “Think About Sending Every Registered Voter A Dollar.”**

“Mr Romney’s campaign has so far failed to bewitch Republican primary voters. This much was clear at a speech on April 10th at the Annenberg Presidential Conference Centre in College Station, Texas. George Bush senior was there to introduce Mr Romney to a sympathetic audience. The candidate spoke well and looked nicely presidential, but his reception was merely warm. Right now Mr Romney needs attention and fans more than money. Perhaps he should think about sending every registered voter a dollar.” (“Mitt The Moneymaker,” *The Economist*, 4/12/07)

Romney Received Vietnam Draft Deferment Due To Mission Abroad And Subsequent Student Exemption, Then Drew High Number Before Student Deferment Expired

Romney Received 30-Month Deferment Due To Mormon Mission Plus Three-Year Student Exemption – He Insisted His Father, Then Governor Of Michigan, Had No Influence Over His Status. “GOP Senate candidate W. Mitt Romney received a two-and-a-half year draft deferment as a Mormon missionary, in addition to a nearly three-year student exemption, during the Vietnam War, federal records show. ... There is no evidence that Romney, whose father was governor of Michigan from 1962-68, received any special treatment to avoid the draft, or to procure the two-and-a-half year missionary assignment in France.” (Joe Battenfeld, “GOP Senate Hopeful Romney Got Draft Deferment For Vietnam,” *The Boston Herald*, 5/2/94)

- **Romney: “Nothing Wrong” With The Deferments.** “I didn’t go on a mission to avoid the draft ... There was nothing wrong with (the deferments). I followed the process like any other kid ... I never asked my dad in any way to be involved with the draft board.” (Joe Battenfeld, “GOP Senate Hopeful Romney Got Draft Deferment For Vietnam,” *The Boston Herald*, 5/2/94)

“Romney Said He Initially Believed The Vietnam War ‘Was Being Fought For The Right Purposes,’ He Later Realized ‘I Was Wrong.’” (Joe Battenfeld, “GOP Senate Hopeful Romney Got Draft Deferment For Vietnam,” *The Boston Herald*, 5/2/94)

Romney “Acknowledged He Did Not Have Any Desire To Serve In The Military During His College And Missionary Days.”

“Romney, however, acknowledged he did not have any desire to serve in the military during his college and missionary days, especially after he married and became a father. ‘I was not planning on signing up for the military,’ he said. ‘It was not my desire to go off and serve in Vietnam, but nor did I take any actions to remove myself from the pool of young men who were eligible for the draft. If drafted, I would have been happy to serve, and if I didn’t get drafted I was happy to be with my wife and new child.’” (Joe Battenfeld, “GOP Senate Hopeful Romney Got Draft Deferment For Vietnam,” *The Boston Herald*, 5/2/94)

- **As Presidential Candidate, Romney Now Says He “Felt Guilty About The Draft Deferment” He Received For Going On Religious Mission To France.** “The closest he has ever come to a personal religious crisis, he recalls, was when he was in college and considering whether to go off on a mission, as his grandfather, father and brother had done. Mitt was deeply in love with Ann, his high school sweetheart and future wife, and couldn’t bear to spend more than two years away from her. He says he also felt guilty about the draft deferment he would get for it, when other young men his age were heading for Vietnam.” (Karen Tumulty, “What Romney Believes,” *Time*, 5/21/07)

Romney Became Eligible For Draft In 1969 But Drew High Number. “Romney became eligible for the Selective Service’s first draft lottery in Dec. 1969, and received number 300, virtually ensuring he would not be drafted when his student deferment expired in Dec. 1970. Only those who got up to 195 were taken for service. Without the missionary exemption, Romney’s undergraduate deferment could have expired in 1969, several months before the lottery was held. But Romney said the missionary deferment had no effect on his draft status because after receiving his undergraduate degree, he would have continued on to law school, resulting in more deferments.” (Joe Battenfeld, “GOP Senate Hopeful Romney Got Draft Deferment For Vietnam,” *The Boston Herald*, 5/2/94)

Romney’s Exempt Status Expired In Late 1970, But High Draft Number From Previous Year Ensured He Would Not Go To Vietnam. “Romney’s five-year exempt status expired in late 1970, but he was not drafted because he had drawn a high lottery number the previous year, according to Selective Service records. ... Romney, who had a student deferment as a freshman at Stanford University, got a ‘4-D’ deferment, as a ‘minister of religion or divinity student,’ in July 1966 when he entered the missionary program, Selective Service records show. He returned from his missionary assignment in late 1968 and got another student deferment in 1969 when he enrolled at Brigham Young University.” (Joe Battenfeld, “GOP Senate Hopeful Romney Got Draft Deferment For Vietnam,” *The Boston Herald*, 5/2/94)

IRAQ

Romney Has Generally Been Described As A Supporter Of President Bush’s Iraq Policy

 **Romney Declines To Say Iraq Invasion Was Correct Course Of Action, But Added “I’m Not Going To Second Guess The Decision.”** FOX’s SEAN HANNITY: “So your position on Iraq, it was right to go in. ...” ROMNEY: “Well, I’m not going to second guess the decision going in, based on what we knew at the time. We believed they had weapons of mass destruction. We were almost certain they did. And it turns out that apparently they didn’t. So we put that aside. ... Then began the process of trying to bring stability to the country and that we didn’t do so well.” (Fox News’ “Hannity & Colmes, 4/4/07)

- **“Massachusetts Gov. Mitt Romney, A Potential Republican Presidential Candidate, Said ... He Supports The Way President Bush Has Carried Out The War In Iraq.”** (“Romney Backs Bush Handling Of Iraq War,” *Boston Herald*, 12/21/06)

 **Romney Slammed Senate Democrats’ 2007 Proposal To Defund The Iraq War.** “[I]t’s a terrible idea. ... No one likes the fact that we’re still in Iraq. Everybody wants our troops home as soon as they possibly can be home. But people who have studied it very carefully and put politics aside recognize that if we simply withdraw on a precipitous basis, we open a risk of a very substantial nature to America’s interests. ... These are the consequences of improper departure from Iraq, and so we have to make sure that we manage to the extent humanly possible this process to maintain order and a decree of stability we don’t let this country to fall in complete and total collapse.” (Fox News’ “Hannity & Colmes, 4/4/07)

 **Romney Said “We Made A Lot Of Mistakes” In Iraq, Calling Current Situation A “Mess” But Affirming Necessity Of Keeping Troops There.** “The people in Congress, and the people of America have to recognize that you’ve got to separate our disappointment and, in some cases, anger with where we are in Iraq. We made a lot of mistakes. ... [T]he war has not been conducted perfectly by any means. We are, to a certain degree, responsible for the mess we find ourselves in. But as long as there’s a reasonable probability that a pathway exists for us to maintain a central government in Iraq, with a central military, albeit with strong sub-states, that’s a pathway which is in the best interest of America.” (Fox News’ “Hannity & Colmes, 4/4/07)

April 2007: Asked If We Are Winning In Iraq, Romney Said “It Depends On How You Define That.” “Asked if we are winning the war, Romney said that ‘it depends on how you define that.’ He described the current phase of the conflict as nation building.” (Mary Beth Schneider, “Romney Blasts Reid For Remarks On Iraq,” *Indianapolis Star*, 4/21/07)

 **June 2007: Asked If Iraq Invasion Was Mistake Knowing What We Now Know, Romney Called The Question “A Non-Sequitur ... Or A Null Set” And An “Unreasonable Hypothetical,” Adding: “We Did What We Did.”** QUESTION: “Governor, thank you, but the question was, knowing what you know right now – not what you knew then, what you know right now – was it a mistake for the United States to invade Iraq?” ROMNEY: “Well, I answered the question by saying it’s a non-sequitur. It’s a non – null set kind of question, because you can go back and say, ‘If we knew then what we know now, by virtue of inspectors having been let in and giving us

that information, by virtue of if Saddam Hussein had followed the U.N. resolutions,' we wouldn't be having this discussion. So it's a hypothetical that I think is an unreasonable hypothetical. And the answer is: We did what we did. We did the right thing based on what we knew at that time. I think we made mistakes following the conduct or the collapse of Saddam's government." (Mitt Romney, CNN Republican Presidential Candidates Debate, Manchester, NH, 6/5/07)

In June 2007, Romney "Increased His Criticism" Of Bush Administration Policy In Iraq

Romney "Rejected" Bush Administration's Vision Of Long-Term Troop Presence In Iraq As Being Similar To South Korea, Saying It Sent The Wrong Message. "Republican presidential hopeful Mitt Romney on Thursday rejected the Bush administration's vision of a decades-long U.S. troop presence in Iraq akin to South Korea and suggested a need for public benchmarks to gauge progress. ... Romney said the comparison sends the wrong message. 'We have communicated to the people in the region and the country that we're not looking to have a permanent presence in Iraq and I don't think we want to communicate that we were just kidding about that,' he said." (Liz Sidoti, "Romney At Odds With Bush Administration On Decades-Long U.S. Presence In Iraq," *The Associated Press*, 6/8/07)

- **Romney:** "Our objective would not be a Korea-type setting with 25-50,000 troops on a near permanent basis remaining in bases in Iraq ... I think we would hope to turn Iraq security over to their own military and their own security forces, and if presence in the region is important for us than we have other options that are nearby." (Liz Sidoti, "Romney At Odds With Bush Administration On Decades-Long U.S. Presence In Iraq," *The Associated Press*, 6/8/07)

"[Romney] Has Increased His Criticism Of How The Administration Waged The War And Handled The Invasion's Aftermath." (Liz Sidoti, "Romney At Odds With Bush Administration On Decades-Long U.S. Presence In Iraq," *The Associated Press*, 6/8/07)

Romney Noted U.S. Bases In Nearby Countries While Saying We Should Maintain "Presence In The Region" While Avoiding Specter Of Occupation. "Romney noted that the U.S. has bases in Saudi Arabia, Kuwait and Qatar, and said: 'We can have a presence in the region, but I think that at this time we need to exercise care not to communicate to insurgents something that they can use to say "Ah ha! America does intend to be an occupier forever!"'" (Liz Sidoti, "Romney At Odds With Bush Administration On Decades-Long U.S. Presence In Iraq," *The Associated Press*, 6/8/07)

In April 2007, Romney Came Under Fire For Advocating "Secret" Withdrawal Timetable Similar To Proposal By Democrat Senator

 **In Early April, Romney Endorsed A Private "Series Of Timetables And Milestones."** ABC'S ROBIN ROBERTS: "Do you believe there should be a timetable in withdrawing the troops?" ROMNEY: "Well, there's no question but that the president and Prime Minister Maliki have to have a series of timetables and milestones that they speak about. But those shouldn't be for public pronouncement. You don't want the enemy to understand how long they have to wait in the weeds until you're going to be gone." (ABC's "Good Morning America," 4/3/07)

-  **Romney:** "[O]f Course You Have To Work Together To Create Timetables And Milestones, But You Don't Do It With The Opposition." (ABC's "Good Morning America," 4/3/07)

Romney's Plan "Bears Some Striking Similarities To An Idea Hatched And Endorsed By Democratic Senator Mark Pryor, D-Arkansas." "[Romney's] call this morning for a set of timetables for withdrawal from Iraq – private timetables unknown to the public – bears some striking similarities to an idea hatched and endorsed by Democratic Senator Mark Pryor, D-Arkansas." (Z. Byron Wolf, "ABC News Political Radar" Blog, "Echoes Of Pryor In Romney Plan," abcnews.go.com, 4/3/07)

- **Pryor Has "Been Alone" And "Drawn Skepticism."** "Pryor has been alone in his calls for a classified timetable and has drawn skepticism from the reporters who wrote about them, as well as his Democratic and Republican colleagues who would not support them." (Z. Byron Wolf, "ABC News Political Radar" Blog, "Echoes Of Pryor In Romney Plan," abcnews.go.com, 4/3/07)

Presidential Candidate Duncan Hunter (R) – Former Chairman Of House Armed Services Committee – Blasted Romney's Comments. "Romney is absolutely wrong in recommending a secret timetable. ... Secret timetables are bad because in the end they all become public and the enemy uses them to estimate the limit on America's endurance." (Teddy Davis, "ABC News Political Radar" Blog, "Romney 'Absolutely Wrong' On 'Secret' Timetables, Hunter Says," blogs.abcnews.com, 4/3/07)

Romney Says Bush & Cheney Were Wrong About Saddam's Weapons But Told The Truth "As They Understood It"

 **Romney Said America And The World Were "Wrong" About Weapons Of Mass Destruction.** "Clearly we were very, very surprised by the fact that there weren't weapons of mass destruction, apparently. Did we make a mistake? Absolutely. We thought there were weapons of mass destruction there. When I say we, I'm not just talking about our intelligence resources. I'm talking about those around the world. We were wrong." (MSNBC's "Hardball," 12/12/05)

-  **Romney: "I Supported The President At The Time That He Entered Into Iraq And Believed That He Had The Kind Of Information He Needed To Have To Make That Decision."** (Fox News' "Fox News Sunday," 2/26/06)

 **Romney: President And Vice President Acted In What They Believed Were Best Interests Of The Country.** "I believe that Dick Cheney and the president told the truth as they understood it and have done what they believe is in the best interest of the American people without exception. They are doing what they think is right in the country." (MSNBC's "Hardball," 12/12/05)

Romney Said Post-War Planning Was Not Done Effectively And There Were Not Enough Troops

 **Romney Is Critical Of Post-War Planning In Iraq, Citing Too Few Troops And "Failures Of Our Own Preparation."** "I think the place where we really fell down in our planning was in preparation for what would happen after we knocked down Saddam Hussein. I think we underestimated the kind of mayhem that might ensue once insurgency started from surrounding nations, once people within Iraq itself began the sectarian violence ... But those kinds of developments would have suggested that we needed more troops. ... And so, I think we were underprepared, underplanned, understaffed, certainly undermanaged with regards to the prison situation. We find ourselves in a very difficult situation, in part because of the failures of our own preparation." (Fox News' "On The Record," 4/23/07)

 **Romney: "Planning Level And The Troop Strength Level Were Not Adequate For The Need."** "[F]ollowing the collapse of the Hussein government, we found that the planning level and the troop strength level were not adequate for the need. But we are where we are now. And problems arise. And surprises occur in major international conflict." (CNN's "The Situation Room," 10/17/06)

 **Romney: "I Don't Think We Were As Fully Planned As We Needed To Be For Taking Over The Country. I Don't Think We Had Enough Military Manpower In Place To Manage The Country Effectively."** (Fox News' "Your World," 10/26/06)

-  **Romney Bemoaned Failure To Send Enough Troops, Protect Oil Infrastructure.** "We probably didn't have enough troops there. We were not prepared for taking over the country and trying to stabilize it, get it secure. And they saw people come into the country from other countries, insurgents. We didn't protect the oil fields or the pipelines very well." (Fox News' "Your World," 8/31/06)
-  **Romney: "We Haven't Had Sufficient Troops."** "I think also that we haven't had sufficient troops following the period of major conflict, and so those are not new or novel observations. I think the president would agree there's a benefit that comes with hindsight." (Fox News' "Fox News Sunday," 2/26/06)

 **Romney: "Well, I Don't Think We Did An Adequate Job Explaining To The American People All The Reasons For Entering Iraq. There Were Obviously Intelligence Failures."** (Fox News' "Fox News Sunday," 2/26/06)

-  **Romney: "[T]here's No Question It's An Enormous Disappointment, From What Our Expectations Were."** (Fox News' "Your World," 10/26/06)

 **Romney Felt Administration Had Ineffective Plan And Too Few "Boots On The Ground."** "Secondly, what our responsibility is at this stage, given the fact that we went in, we toppled the government, I don't think we had as effective a plan in place as we needed to have, or enough boots on the ground to secure the country, but that's over now." (Fox News' "The O'Reilly Factor," 11/23/06)

-  **Romney: “We Didn’t Do A Particularly Fabulous Job” In Period Immediately Following Saddam’s Ouster.** “But I also think there’s a -- a recognition that -- that the conduct of the conflict, post the period of major conflict, when -- when Saddam fell, the period after that, we didn’t do a particularly fabulous job. And that’s to say the least. A lot of mistakes were made.” (Fox News’ “Your World,” 8/31/06)

 **Romney: “It Has Been A Lot Tougher Than The American Public Was Prepared For.”** “I think people, all of us, are very concerned that Iraq didn’t proceed as we had expected it would. We thought it would be a quick takedown, and then a replacement with an Iraqi government. It has been a lot tougher than the American public was prepared for.” (Fox News’ “Your World,” 10/26/06)

 **Romney Called Abu Ghraib Scandal “Unfortunate.”** “I think the prison abuse scandal is something which has been unfortunate.” (Fox News’ “Fox News Sunday,” 2/26/06)

Romney Hedged On Endorsing Troop Surge And Has Been Criticized For Not Talking About Iraq

April 2007: American University Professor Said Romney Had Yet To Articulate “A Specific Iraq Policy.” “Richard Semiatin, an assistant professor of government at American University, said that Romney, if he’s going to be a leading candidate, will have to articulate a true plan for the war. ‘If he’s going to compete here, he’s really going to have to come up with a specific Iraq policy,’ Semiatin said. Otherwise, he said, ‘he’ll get cut up in debates.’” (Scott Helman, “Romney Urges More Be Spent On Defense And Energy Research,” *The Boston Globe*, 4/11/07)

Republican Legislator From New Hampshire Said Romney Has Not “Zeroed In” On The Issue Of Iraq. “A local Republican last night issued a stern warning to Mitt Romney that he must resolve the issue with Iraq if he expects to win the race for the White House. ‘You have not zeroed in on the main issue that’s bothering voters in New Hampshire – especially independents in New Hampshire – and that’s the Iraq war,’ state Rep. Bob Elliott, R-Salem, said during a Romney campaign event at a local Bickford’s near the Massachusetts border.” (Margo Sullivan, “Romney Gets Earful Over Iraq,” *The Eagle-Tribune* [Lawrence, MA], 4/26/07)

- **Romney’s Response Did Not Impress His Questioner.** “[Elliott] said he was unimpressed with Romney’s performance. ‘I don’t think he handled it well at all,’ Elliott said, adding that he plans to continue asking Romney the same question as the campaign progresses.” (Margo Sullivan, “Romney Gets Earful Over Iraq,” *The Eagle-Tribune* [Lawrence, MA], 4/26/07)

Romney’s Failure to Mention Iraq In January ‘07 *National Review* Summit Speech Called “Bizarre And Just Wrong And Almost Offensive In My View” By Editor Rich Lowry. “Put aside how rambling and unfocused [the speech] was. Maybe that can be chalked up to a bad night or fatigue. But to speak for 50 minutes or so and not to talk about the Iraq war before a conservative audience at a crucial moment in that war is bizarre and just wrong and almost offensive in my view. This doesn’t seem like an oversight. [Romney] went out of his way to check off every conservative box – except the one that is politically risky at the moment.” (Rich Lowry, “The Romney Speech,” *National Review*’s “The Corner” Blog, corner.nationalreview.com, 1/29/07)

Late December 2006: Romney Deferred When Asked About Surge, Saying “I’m Still A Governor.” “I’m not going to weigh in. I’m still a governor. I’m not running for national office at this stage. I’m not going to weigh in on specific tactics about whether we should go from 140,000 to 170,000. That’s something I expect the President to decide over the next couple of weeks and announce that to the nation. I want to hear what he has to say.” (Robert Bluey, “Q&A: Mitt Romney Discusses Iraq War, Reagan’s Influence And Gay Marriage,” Human Events Website, www.humanevents.com, 12/28/06)

December 2006: Romney “Avoided” Controversial Issues Like Iraq, Instead Delivering “Brief But Upbeat Remarks About How People In Asia Like Americans.” “[R]omney avoided many of the controversial issues that have arisen in his campaign in recent weeks [like] abortion, gay marriage and the Iraq war. Instead, he delivered brief but upbeat remarks about how people in Asia like Americans...” (David Pitt, “Romney Says He Backs Bush’s Iraq War Policies,” *The Associated Press*, 12/20/06)

- **Romney “Declined To Discuss” His Stance On Troop Surge.** “[Romney] said Wednesday he supports the way President Bush has carried out the war in Iraq, but he declined to discuss specifics about whether more troops should be sent. ... When asked if he supported a surge in troops, one of the options Bush is said to be considering, Romney declined to discuss such details.” (David Pitt, “Romney Says He Backs Bush’s Iraq War Policies,” *The Associated Press*, 12/20/06)

In November 2006, Romney Admitted He Didn't Have A Plan For Iraq. FOX NEWS' BILL O'REILLY: "Do you have a plan in Iraq?" MITT ROMNEY: "Well, I wouldn't presume to present a plan different than the president, but I can tell you that I believe he was right to take the war on terror on an aggressive front." (Fox News' "The O'Reilly Factor," 11/23/06)

In January 2007, Romney Finally Came Out In Support Of President Bush's Troop Surge Proposal

Romney Issued Press Release On January 10, 2007 Stating His Agreement With President's Troop Surge.

"I agree with the President: Our strategy in Iraq must change. Our military mission, for the first time, must include securing the civilian population from violence and terror. ... In consultation with Generals, military experts and troops who have served on the ground in Iraq, I believe securing Iraqi civilians requires additional troops. I support adding five brigades in Baghdad and two regiments in Al-Anbar province. Success will require rapid deployment. This effort should be combined with clear objectives and milestones for U.S. and Iraqi leaders." (Romney Exploratory Committee, Press Release, 1/10/07)

- **CNN's Wolf Blitzer:** "Here's where Governor Romney stands on some of the top campaign issues. He supports President Bush's position on Iraq, opposes an early troop withdrawal." (CNN's "The Situation Room," 1/3/07)

Romney: "We Should Not Turn Around And Walk Out Of Iraq. That Would Be A Mistake." ("Romney Backs Bush Handling Of Iraq War," *Boston Herald*, 12/21/06)

-  **Romney:** "[W]e're in a setting which is very challenging. But simply turning around and walking out now could lead to a humanitarian disaster." (CNN's "The Situation Room," 10/17/06)
-  **Romney:** "I think very few responsible Democrats, including people like Hillary Clinton, say just turn around and get out. We all want to get out as soon as we can. But we recognize that Iraq is simply a front on the war on terror. Terror is going to continue. The jihadists are trying to take over modern Muslim nations." (CNN's "The Situation Room," 10/17/06)
-  **Romney:** "This is going to be a long effort. It hasn't been perfectly run so far – that I will give you. But the idea of just turning and running out has huge humanitarian consequences, potentially geopolitical consequences for our nation and for the world." (Fox News' "The Big Story," 11/17/06)

 **Romney Stated His Agreement With McCain That Surge Was "The Only Way To Go."** "Well, we [Romney and McCain] both agreed that the troop surge makes sense. Walking away from Iraq at this point would present some very serious challenges and risks in country that we don't want to take, potentially a massive open civil war, potentially even a regional conflict which could draw us back into the region. So, the troop surge is the only way to go." (Fox News' "The Big Story," 4/3/07)

Romney Feels Surge Yielding Early Signs Of Progress On The Ground, Yet Called Urge To Withdraw Troops "Very Tempting"

 **Romney Has Said There Are "Very Early Signs That Progress Is Being Made."** "There are early signs, very early signs, that progress is being made. If those signs continue to hold and if we see the kind of improvement in the capability of the Iraqi military, that'll be very, very encouraging. But, at this stage, the signs are positive and it's a lot better than it would have been had we continued the old policy or if we just walked away." (Fox News' "The Big Story," 4/3/07)

 **Romney: "We're Seeing The Troop Surge Is Beginning To Show Signs Of Working."** "[M]y view is that right now the right step for us to take is to support the commander in chief by putting in additional troops to make sure that al Maliki's government is taking the lead. We're seeing the troop surge is beginning to show signs of working. Now I'm not wild about keep any troops there any longer than we have to. But I think dividing the country in parts and getting out or simply getting out presents some risks to America." (CNN's "Larry King Live," 3/15/07)

"The Idea Of Pulling American Troops Out Of Iraq Is 'Very Tempting,' Romney Said, But Doing So Would Lead To A Larger Conflict In The Region." (Mike Glover, "Romney Says Stressed Military Needs More Troops," *The Associated Press*, 5/30/07)

Romney Has Made Favorable Comments On Plan Offered By Sen. Joe Biden (D-DE) To Split Iraq Into Thirds

Romney Said Sen. Biden's Plan To Partition Iraq Into Thirds Deserves Thought If Surge Fails. "I want to see what the result is from the troop surge,' Romney said. 'I think we're going to know whether this is working within months, not years.' Should that fail, he said, other options need consideration – including Delaware Democratic Sen. Joe Biden's plan to split Iraq into thirds." (Jason Cato, "Romney Wants Competition, Partnership With China," *Pittsburgh Tribune Review*, 4/28/07)

Romney Would Leave All Options On Table Regarding Iraq, Including Biden Plan. "On Iraq, Romney continued to voice support for the 'surge' strategy in Iraq, but said when he becomes president all possible strategies are on the table. 'All the options that are being spoken of today, for instance, Joe Biden says let's divide the country up and leave. That option will still be available 6 months from now.' (Jake Tapper and Matt Stuart, "Romney On Offense," ABCNews.com, 5/19/07)

Romney Claimed Biden Plan "Made Sense To Him," Saying "At Least ... He Puts A Plan Forward That Has Some Prospect Of Success." "One argument that he said made sense to him was pushed by U.S. Sen. Joe Biden, D-Del., who advocated dividing Iraq into three separate regions dominated by Kurds, Shiites and Sunnis. 'At least in the case of Sen. Biden, he puts a plan forward that has some prospect of success,' Mr. Romney said. 'But the challenge with that plan is it adds an additional risk, a risk which is not incurred if a central [Iraq] and a government remains. A central government can maintain its borders against Iran and quell al-Qaida. You have to have a central government for that to happen.' With that in mind, he said, he'd prefer to see how the current U.S. troop surge works before exploring other options in Iraq." (Dan Majors, "Romney Pays Visit Seeking Support," *Pittsburgh Post-Gazette*, 4/28/07)

Intentionally Or Not, Romney Called For Larger Troop Surge Than President Bush

President's Surge Included Five Brigades To Baghdad Plus One Regiment Of 4,000 Troops To Al Anbar Province. "So I've committed more than 20,000 additional American troops to Iraq. The vast majority of them – five brigades – will be deployed to Baghdad. ... I have given orders to increase American forces in Anbar Province by 4,000 troops." (President George W. Bush, Remarks In Washington, DC, 1/10/07)

- **Regiment Is Between 3,000 And 5,000 Troops.** "Prompted last month by Defense Secretary Donald Rumsfeld to consider ways to make more personnel available for duty in Iraq, the Marine Corps is advancing a proposal to increase its overall size by 3,000 to 5,000 Marines ... The bid for an additional infantry regiment follows inquiries about available forces made last month by Rumsfeld and Gordon England, the deputy defense secretary." (Jason Sherman, "Marines Want Another Infantry Regiment," *Military.com*, 11/7/06)
- **Analyst Fred Kagan Says Bush Administration Planned To Send "One Regiment Into Al Anbar ... Around 4,000 Troops."** "The Bush administration ... [is] briefing a surge of as many as five brigades into Baghdad and one regiment into al Anbar ... They are saying that five brigades contain around 17,500 troops, and the regiment around 4,000 troops, for a total surge of around 21,500 soldiers and Marines." (Frederick W. Kagan, "Numbers Games," *The Weekly Standard*, 1/17/07)

Romney Called For Adding Two More Regiments In Anbar Province – One More Regiment Than President Bush Called For. "In consultation with Generals, military experts and troops who have served on the ground in Iraq, I believe securing Iraqi civilians requires additional troops. I support adding five brigades in Baghdad and two regiments in Al-Anbar province." (Romney For President Exploratory Committee, Press Release, 1/10/07)

During GOP Presidential Debate In South Carolina, Romney Incorrectly Claimed Weapons Inspectors Were Not Allowed To Enter Iraq Before 2003 U.S. Invasion

During The Third GOP Presidential Debate, Romney Claimed That Saddam Hussein Had Not Opened Iraq To Weapons Inspectors From The International Atomic Energy Agency (IAEA). "In the first minutes of Tuesday's debate, former Massachusetts Gov. Mitt Romney claimed that the war in Iraq was the fault of Saddam Hussein. Specifically, Romney said that the war could have been averted if Hussein had "opened up his country" to inspectors from the International Atomic Energy Agency." (Michael Scherer, "Romney On Those Gaffes," Salon.com, 6/9/07)

 **Romney: "If You're Saying, Let's Turn Back The Clock And Saddam Hussein Had Opened Up His Country To IAEA Inspectors ... [H]e Didn't Do Those Things."** "The question [about whether going to war in Iraq was the right decision] is, kind of, a non sequitur ... If you're saying, let's turn back the clock and Saddam

Hussein had opened up his country to IAEA inspectors and they'd come in and they'd found that there were no weapons of mass destruction, had Saddam Hussein therefore not violated United Nations resolutions, we wouldn't be in the conflict we're in. But he didn't do those things, and we knew what we knew at the point we made the decision to get in. I supported the President's decision based on what we knew at the time." ("Romney Clarifies Iraq Statements," *Orange County Register*, 6/12/07)

Three Days Before U.S. Invasion Of Iraq, Two Organizations Were Conducting Inspections Inside Iraq – Both Were Advised To Leave Prior To Military Conflict. "Mohamed El Baradei, head of the U.N.'s International Atomic Energy Agency that has been investigating whether Iraq has resumed any nuclear weapons production, confirmed in a Monday report to his agency's board of governors that his inspectors were advised to leave. 'Late last night...I was advised by the United States government to pull out our inspectors from Baghdad,' El Baradei said in a statement. He added that the U.N.'s Monitoring, Verification and Inspection Commission, headed by Hans Blix, was given similar advice." ("UN Secretary General Orders Inspectors, Staff To Leave Iraq," [The Online News Hour](#), 3/17/03)

- **September 2002: Saddam Informed The U.N. He Would Allow "Unconditional Return" Of U.N. Weapons Inspectors.** "16 September 2002: UN Secretary General Kofi Annan says he has received a letter from the Iraqi Government offering to allow the unconditional return of weapons inspectors." ("Timeline: Iraq Weapons Inspections," [BBC News](#), 11/18/02)
- **November 2002: U.N. Inspectors, Led By Hans Blix, Entered Iraq To Begin Inspections.** "18 November 2002: Hans Blix leads UN inspectors back to Baghdad to start their mission." ("Timeline: Iraq Weapons Inspections," [BBC News](#), 11/18/02)

The Orange County Register Called Romney's Assertions "Naïve At Best," Pointing Out That That IAEA Inspectors Were In Iraq Prior To US Invasion, And Left The Country Only At President Bush's Request. "That statement suggests that Gov. Romney didn't know or had forgotten that prior to the war Saddam Hussein did allow UN weapons inspectors in, that the inspectors were able to visit most of the sites they wanted to, that they asked U.S. intelligence agencies for more information on specific sites where weapons were expected to be and inspected them, finding no weapons of mass destruction ... it was President Bush, not Saddam Hussein, who informed the IAEA that it would be prudent to end the inspections, since, as we soon discovered, the United States had already decided to invade Iraq." ("Romney Clarifies Iraq Statements," *Orange County Register*, 6/12/07)

Annenberg Public Policy Center Called Romney's Claim One Of "The Biggest Factual Fouls" Of The Debate. "Former Massachusetts Gov. Mitt Romney committed the biggest factual fouls of the night, misleadingly asserting ... that we went to war in Iraq because Saddam Hussein refused to allow weapons inspectors to come in." ("Third Time Around For GOP Hopefuls," [FactCheck.org](#), 6/8/07)

The Washington Post's Howard Kurtz: Romney's Statement Was "Completely Untrue." "Former Massachusetts governor Mitt Romney said in this debate this week that Saddam Hussein kicked out the U.N. weapons inspectors before the Iraq war started. Well, that's completely untrue, and yet almost no news organization remarked on that." (CNN, "Reliable Sources," 6/10/07)

After His Statements Were Called Into Question, Romney Refused To Concede His Error. "On Wednesday, Romney was asked to expand on his remarks about Hussein at an 'Ask Mitt Anything' town hall in Manchester, N.H. The candidate stuck to his guns, again blaming Hussein's resistance to IAEA inspections for the invasion. 'It was his choice not to allow the kind of inspections that would have communicated to the world that there were not weapons of mass destruction,' he said. 'And that was an error, obviously an error that was very costly.'" (Michael Scherer, "Romney On Those Gaffes," [Salon.com](#), 6/9/07)

Romney Criticized Iraq Study Group Report, Said Recommendations "Will Not Meet Our Objectives" In Iraq

Romney Called ISG Report "Product Of A Flawed Process." "The members of the Iraq Study Group deserve credit for their hard work. But their recommendations read like the product of a flawed process — one more focused on reaching consensus for the sake of reaching consensus." (Kathryn Jean Lopez, "A Primary Factor," *National Review Online*, 12/14/06)

- **Romney:** "There were a few recommendations that I found especially striking: Suggesting that somehow the Israel-Palestine conflict is a root of sectarian and insurgent violence in Iraq is just wrong. Sunnis are killing Shia and vice versa. Pressuring Israel won't change that." (Kathryn Jean Lopez, "A Primary Factor," *National Review Online*, 12/14/06)

Romney Criticized ISG's Recommendation To Enter Dialogue With Regimes Like Iran And Syria. "Proposing that we negotiate with terrorist regimes like Syria and Iran — without a rigorous analysis of how our incentives could ever be aligned — is just counter-productive. ... I have no quarrel with talking, especially if it yields valuable intelligence and insight about an adversary. But that's a far cry from actually negotiating with Iran, which sponsors Hezbollah, has nuclear ambitions, and has been clear in its intention to wipe our ally Israel off the map." (Kathryn Jean Lopez, "A Primary Factor," *National Review Online*, 12/14/06)

Romney Said Removing Troops From Combat Positions Before Iraq Was Secure Was Poor Idea. "[I]nferred that our troops may be withdrawn from combat positions before Iraq is secure runs counter to my view and to the views I have heard from some of America's most accomplished military leaders. ... I am not suggesting that there are simple solutions for Iraq. But it is clear to me that some of these recommendations will not meet our objectives in Iraq, or in the broader long war America is fighting today." (Kathryn Jean Lopez, "A Primary Factor," *National Review Online*, 12/14/06)

Romney Spokesman Eric Fehrnstrom: "To Pull Out Troops Precipitously Now Would Lead To A Humanitarian Disaster In Iraq." (Brian MacQuarrie, "Referendum Against Iraq War Gaining Ground," *The Boston Globe*, 11/8/06)

IRAN

Romney Has Staked Out Early, Aggressive Position On Confronting Iran's Nuclear Ambitions While Seeming To Rule Out Option Of Military Action

 **Romney Accused Sen. Hillary Clinton Of "Timidity" For Suggesting Diplomatic Engagement With Iran.** "[W]e do have interest in making sure that they do not develop additional nuclear technology and, in my view, that's where Sen. Clinton has gone off the right track. She's suggesting engaging with Iran. That's a timidity that's not right. This is a time to tighten our sanctions, economic, because they're having an impact, and to increase our diplomatic isolation of Iran." (ABC's "This Week," 2/16/07)

-  **Romney: "[N]egotiation And Engaging With The Iranians At This Point Is Not The Way To Go And Neither Is Invading Them."** (ABC's "This Week," 2/16/07)

 **Romney Said U.S. Military Action Against Iran Is "Not Going To Happen."** "I think the president has whatever authority is necessary to protect this country and protect our troops. I think [the] Iranian military has been involved in the conflict in Iraq. Iranians have supported the attack on our soldiers. But I don't think for a minute that this president is intent on attacking Iran. That's not where we're aiming. That's not going to happen. We have no interest in going into Iran." (ABC's "This Week," 2/16/07)

Romney Wants To Punish President Mahmoud Ahmadinejad With Diplomatic Sanctions, Genocide Indictment

 **Romney Backs Tough Diplomatic And Economic Sanctions On Iranian Government.** "Iran is not acting like a very civilized member of the world society. Iran's sins go well beyond taking these hostages. They go to a nuclear program which has far more reaching implications for the world and it's time for us to truly tighten down the screws economically on Iran, to put in place diplomatic sanctions which make it very clear to all the people in Iran, that they're a rogue state, that they are a pariah and then to work with local or surrounding moderate Islamic states to get them to get on our side to also pressure Iran." (Fox News' "The Big Story," 4/3/07)

-  **Romney: "The World Needs To Come Together Here And Treat These Folks Just As Bad Or Even Worse Than We Treated The South Africans During The Days Of Apartheid."** (Fox News' "The Big Story," 4/3/07)

 **Romney Supports Indicting Ahmadinejad Under Genocide Convention.** "[F]rom a diplomatic standpoint, I think we ought to indict him under the genocide convention ... This is a person who, the world should understand, and the people of Iran should understand, is not someone who should be leading a country and I think that's something that we're beginning to make progress in doing." (Fox News' "The Big Story," 4/3/07)

As Governor, Romney Refused To Provide State Security For Former Iranian President During Visit To Harvard

In September 2006, Romney Refused To Offer State Police Protection To Harvard Guest Speaker And Former Iranian President Mohammed Khatami, Calling Him A “Terrorist.” “Governor Mitt Romney declared yesterday he would not allow any state resources to be used to protect a former Iranian president during his visit to the Boston area this weekend, and he sharply criticized Harvard University for inviting Mohammed Khatami to speak on the eve of the fifth anniversary of the Sept. 11 terrorist attacks. ‘There are people in this state who have suffered from terrorism, and taking even a dollar of their money to support a terrorist is unacceptable,’ Romney [said].” (Farah Stockman and Scott Helman, “Romney Bars State Security For Iranian’s Harvard Visit,” *The Boston Globe*, 9/6/06)

- **Romney Called Harvard’s Invitation To Khatami “A Disgrace” To The Memory Of Terrorism Victims.** “[A]fter Romney issued a statement yesterday outlining his position in which he called Harvard’s invitation ‘a disgrace to the memory of all Americans who have lost their lives at the hands of extremists’ the Boston Police Department said it would step in. ‘We were asked by the State Department to assist in protecting a guest of the United States, and the Police Department plans to oblige,’ spokeswoman Elaine Driscoll said.” (Farah Stockman and Scott Helman, “Romney Bars State Security For Iranian’s Harvard Visit,” *The Boston Globe*, 9/6/06)

Romney’s Condemnation Of Khatami Met Resistance From Human Rights Groups And Academics, Who Contradicted Some Of His Assertions. “Leading human rights groups and academics yesterday disputed aspects of Governor Mitt Romney’s high-profile accusation that Iran’s former president, Mohammed Khatami, was responsible for ‘the torture and murder’ of democracy activists and student protesters. The groups said Khatami was a moderate among Iranian leaders who worked largely in vain to expand political freedoms in Iran ... The violent crackdowns on democracy protesters during Khatami’s time as president 1997 to 2005 were believed to have been initiated by rivals of the president and approved by Iran’s ruling clerics, they said.” (Farah Stockman, “Romney’s Accusation On Khatami Disputed,” *The Boston Globe*, 9/9/06)

Academics Took Issue With Romney’s Characterization Of Khatami’s Presidency. “In his statement to the media explaining his decision to revoke State Police protection for Khatami, Romney accused Khatami of acting in concert with the hard-liners, luring students into protesting only to crack down on their activities. ... But academics across the political spectrum took issue with that account.” (Farah Stockman, “Romney’s Accusation On Khatami Disputed,” *The Boston Globe*, 9/9/06)

- **George Mason University Professor Of Middle East History:** “Shaul Bakhash, professor of Middle East History at George Mason University and a prominent Iran specialist, said Romney’s assertion does not ‘accord with the facts. ‘To say of Khatami that he oversaw the arrest and torture implies that he was directly complicit. I don’t think anyone believes that’s the case ... You might argue that he was not firm enough or that he did not have enough backbone, but it is hard to argue that he was complicit. ... I don’t think the facts really are in dispute.’” (Farah Stockman, “Romney’s Accusation On Khatami Disputed,” *The Boston Globe*, 9/9/06)
- **American Enterprise Institute Scholar And Khatami Critic:** “Michael Rubin, a scholar at the conservative American Enterprise Institute who is a vocal critic of Khatami, also took issue with Romney’s characterization. ‘What is factually correct is to say he turned a blind eye’ to the crackdown, said Rubin, who was in Iran during the July 1999 crackdown. ‘He didn’t oversee it.’” (Farah Stockman, “Romney’s Accusation On Khatami Disputed,” *The Boston Globe*, 9/9/06)
- **Middle East Specialist At Congressional Research Service:** “‘That is not the view of most Iran experts,’ said Kenneth Katzman, a Middle East specialist at the Congressional Research Service, a research arm of Congress. ‘I think most experts on Iran would say that Khatami attempted to stop many human rights abuses but did not prevail politically.’” (Farah Stockman, “Romney’s Accusation On Khatami Disputed,” *The Boston Globe*, 9/9/06)

Groups Like Human Rights Watch And Amnesty International Also Disputed Romney’s Remarks About Khatami. “Human Rights Watch, Amnesty International, and the New Haven-based Iran Human Rights Documentation Center three leading groups monitoring human rights abuses in Iran all disputed aspects of Romney’s depiction of Khatami’s offenses, as did many academic specialists on Iran.” (Farah Stockman, “Romney’s Accusation On Khatami Disputed,” *The Boston Globe*, 9/9/06)

ROMNEY’S FORMER COMPANIES HAVE BUSINESS TIES TO IRAN

After Romney Urged Divestment From Iran, It Was Revealed His Former Firms Had Business Dealings There

In February 2007, Romney Urged States – Specifically New York – To Divest Pension Funds From Holdings Doing Business With Iran. “During the past two months, Romney has challenged Massachusetts and other New England states to pull their pension funds from companies doing business in Iran. On Thursday, Romney expanded his divestment call to New York. He sent a letter to Sen. Hillary Rodham Clinton, D-N.Y., a fellow presidential candidate, urging her to support his effort.” (Glen Johnson, “Company’s Links To Iran Undercut Romney’s Call For Divestment,” *The Associated Press*, 2/23/07)

French Oil Company Total SA Has Deep Ties To Iran – In 2002 Bain Capital Purchased Total’s Chemicals Business, Including Its Office In Tehran

Associated Press Noted New York State Pension System Invests French Oil Conglomerate Total SA. “Dan Weiller, a spokesman for New York State Comptroller Thomas DiNapoli, said Friday that New York’s \$150 billion state pension system has holdings with companies that have dealings with Iran or in that country. Among them is Total SA, a French oil giant. As of March 2006, the state system had about \$166 million worth of Total stock.” (Glen Johnson, “Company’s Links To Iran Undercut Romney’s Call For Divestment,” *The Associated Press*, 2/23/07)

Total Has Been Doing Business In Iran Since The 1950s And Recently Resisted U.S. Calls For Isolating The Regime. “Total won the South Pars [Iran] contract in 1997 as part of an international consortium, including Russia’s Gazprom, Malaysia’s Petronas and Iran’s state-owned NIOC. The French group has been in Iran since the 1950s, though recently it resisted pressure from the US to isolate the Islamic state over its controversial nuclear enrichment programme. Total gave its 40 per cent stake in the South Pars project back to NIOC in 2004 under the terms of the deal. But it still has rights to a share of production from the gas field, equivalent to 18,000 barrels this year, below 1 per cent of its global production.” (Martin Arnold, “Total Faces Investigation Over Dollars 2bn Iran Contract,” *Financial Times*, 12/20/06)

- **Total Is Under Investigation For Bribery In Landing 1997 “South Pars” Iranian Gas Project.** “A Paris judge has launched an investigation into allegations that Total, the French oil and gas group, paid bribes to win a Dollars 2bn gas contract in Iran almost a decade ago. ... The latest investigation stems from the discovery of SFr100m (Dollars 82m) in two Swiss bank accounts, allegedly paid by Total to an Iranian intermediary to help the French company’s consortium win the South Pars contract.” (Martin Arnold, “Total Faces Investigation Over Dollars 2bn Iran Contract,” *Financial Times*, 12/20/06)
- **Total Describes Itself As “Foremost Oil Company In Partnership With Iran.”** “The South Pars gas field is the Iranian portion of what is probably the largest gas field in the world. The other part of the field, in Qatari waters, is known as North Field. With the South Pars project, TotalFinaElf has become the foremost oil company in partnership with Iran and has bolstered its position in the Middle East...” (Total Website, www.total.com, Accessed 2/23/07)

October 29, 2002: Bain Capital Agreed To Purchase Chemical Subsidiary SigmaKalon From Total SA For A Rumored €1 Billion. “French oil giant TotalFina Elf SA agreed Tuesday, Oct. 29, to sell SigmaKalon, Europe’s second-biggest decorative paint maker, to Boston private equity firm Bain Capital as TotalFina’s chemicals unit refocuses. Although a price was not disclosed for the deal, a source close to the situation said it was about euro1 billion (\$980 million) ... Bain beat a number of rivals in a hotly contested auction to acquire SigmaKalon.” (Nicola Hobday, “TotalFina Sells Paints Unit,” *The Daily Deal*, 10/30/02)

- **SigmaKalon Created In 1999 Merger Between Total And Petrofina.** “[SigmaKalon] was created in 1999 when Total and Petrofina merged to create TotalFina and combined their respective paint businesses, Kalon and Sigma Coatings. TotalFina later acquired Elf Aquitaine to create TotalFinaElf, and the merged company’s chemicals business was named Atofina. The SigmaKalon business includes both decorative and industrial paints and coatings.” (Bill Schmitt, “Atofina’s Sale of SigmaKalon May Be Close,” *Chemical Week*, 10/2/02)
- **“Since March 2003 Bain Capital Is Owner Of SigmaKalon.”** (SigmaKalon Website, www.sigmakalon.be, Accessed 2/20/07)

SigmaKalon Has An Office In Tehran, According To Its Company Website. “Sigma Paints Iran, General Office; Shahid Beheshti Ave, Tehran; +98 21 88514873.” (SigmaKalon Website, www.sigmakalon.be, Accessed 2/23/07)

Bain Capital Is Expected To Put SigmaKalon Up For Sale In 2007. “Europe’s second-biggest paint supplier, SigmaKalon ... is expected to be put up for sale next year in a £1.3 billion deal. ... Bain Capital bought SigmaKalon from French oil giant TotalFinaElf for £505 million in 2002. Insiders say it has performed well ahead of expectations, allowing Bain to refinance the business and look for an exit. Though advisers have not yet been

appointed, it is thought that a trade sale is more likely than a stock market float.” (Lucinda Kemeny, “£1.3bn Tag On Paints Company,” *Daily Mail* [London, UK], 12/17/06)

In 2004, Bain & Company's Italian Branch Inked Consulting Deal With Iran's State-Run Oil Company

Italian Branch Of Bain & Co. – Firm Where Romney Started As Young Consultant And Served As CEO In Early '90s – Received \$2.3 Million Contract From National Iranian Oil Company In 2004. “Republican Mitt Romney is urging state pension systems to divest from Iran, yet the presidential contender's former employer and the company he started have links to recent Iranian business interests or deals. Romney joined Boston-based Bain & Co., a management consulting firm, in 1977 and worked there until 1985. ... Bain & Co. Italy, described in company literature as ‘the Italian branch of Bain & Co.,’ received a \$2.3 million contract from the National Iranian Oil Co., in September 2004. Its task was to develop a master plan so NIOC – the state oil company of Iran – could become one of the world's top oil companies, according to Iranian and U.S. news accounts of the deal.” (Glen Johnson, “Company's Links To Iran Undercut Romney's Call For Divestment,” *The Associated Press*, 2/23/07)

TERRORISM

April 2007: Romney Said Catching Usama Bin Laden Would Yield Only Marginal Increase In Safety, Not Worth Cost

Romney Said Capturing Bin Laden Would Result In “Very Insignificant Increase In Safety” For America And Such Effort Was “Not Worth Moving Heaven And Earth And Spending Billions Of Dollars” To Catch One Person. “[Romney] said the country would be safer by only ‘a small percentage’ and would see ‘a very insignificant increase in safety’ if al-Qaida leader Osama bin Laden was caught because another terrorist would rise to power. ‘It's not worth moving heaven and earth spending billions of dollars just trying to catch one person,’ Romney said. Instead, he said he supports a broader strategy to defeat the Islamic jihad movement.” (Liz Sidoti, “Romney Says Rivals Switch Positions, Too,” *The Associated Press*, 4/26/07)

One Day Prior To Romney's Comments, Senior Al Qaeda Official Said Bin Laden Was Orchestrating Terrorist Operations In Iraq And Afghanistan. “Al Qaeda chief Osama bin Laden is orchestrating militants' operations in Iraq and Afghanistan, a senior commander of Afghan Islamist group Taliban said in remarks broadcast on Wednesday. ... ‘He is drawing plans in Iraq and Afghanistan ... Praise God he is alive,’ Mullah Dadullah told Al Jazeera television.” (“Bin Laden Overseeing Iraq, Afghanistan Ops: Taliban,” *Reuters*, 4/25/07)

- **Bin Laden Allegedly Directed 2007 Attack Targeting V.P. Cheney.** “Dadullah said bin Laden ordered the attack on February 27 at the U.S. Bagram base during a visit by U.S. Vice President Dick Cheney to Afghanistan. ‘Do you remember the martyrdom operation inside the Bagram base which targeted a senior American official ... this operation was the result of blessed plans put by him,’ Dadullah said.” (“Bin Laden Overseeing Iraq, Afghanistan Ops: Taliban,” *Reuters*, 4/25/07)

National Review's Byron York: “Perhaps Romney Should Watch The Tape Of The Planes Hitting The Towers Again.” “[J]ust speaking as one taxpayer, I would say a) we have already spent billions and gone to a lot of effort to try to get bin Laden, and b) it would be worth still more money and still more effort to kill the man behind 9/11. I can't imagine any serious Republican candidate for president would say otherwise. Perhaps Romney should watch the tape of the planes hitting the towers again.” (Byron York, “Mitt Romney On Osama Bin Laden,” *National Review's Corner* [Blog](#), 4/27/07)

As Salt Lake Organizing Committee President, Romney Downplayed Bin Laden Threat To 2002 Winter Games

After 9/11, Romney “Downplayed Any Threat Posed By” Bin Laden To Winter Olympics, Saying Real Threat Lay With Homegrown Animal Rights Activists. “After hijacked jetliners smashed into the World Trade Center towers and the Pentagon on Sept. 11, Utahns began openly wondering if the 2002 Winter Games might become a target of Islamic terrorists. But Salt Lake Organizing Committee President Mitt Romney, in a meeting with the Deseret News shortly after the attacks, downplayed any threat posed by Osama bin Laden, explaining instead that the real threat of terrorism against the Winter Olympics lay with home-grown terrorists acting under the flag of animal rights.” (Jerry Spangler, “Animal Activists Still A Top Threat,” *Deseret News*, 11/18/01)

Top Romney Adviser Wanted Bin Laden's Head “In A Box Filled With Dry Ice” In Wake Of 9/11 Attacks

Romney Adviser Cofer Black, Two Days After 9/11: "I Want Bin Laden's Head Shipped Back In A Box Filled With Dry Ice. I Want To Be Able To Show Bin Laden's Head To The President." "Two days after the [9/11] attack, Cofer Black of the Counterterrorist Center asked [CIA's Gary] Schroen to lead a small team of CIA officers to lash up with the Northern Alliance; he accepted on the spot. Osama bin Laden and his deputies were not to be merely captured or 'rendered' to justice, Black ordered: 'I want to see photos of their heads on pikes. I want bin Laden's head shipped back in a box filled with dry ice. I want to be able to show bin Laden's head to the president.'" (Warren Bass, "Into Al Qaeda's Lair," *The Washington Post*, 5/29/05)

Black Has Recently Downplayed Need To Capture Bin Laden, Saying Terrorist Has Been "Isolated" And "Neutralized In Terms Of His Effectiveness." NPR's MARY LOUISE KELLY: "If the search for bin Laden has arrived at a stalemate, Cofer Black, for one, suggests that's not the end of the world. Black was Gary Schroen's boss. He ran the CIA's counterterrorist center from '99 to 2002. He's now with the security company Blackwater USA. Black argues that catching bin Laden remains important for symbolic reasons, but he says there are more pressing concerns today for US national security." BLACK: "The leader of al-Qaeda spends, you know, most of his time hiding. This guy has been, I think, significantly isolated as a real player. So what are we talking about here? To a certain extent, he has been neutralized in terms of his effectiveness." (NPR's "Morning Edition," 5/3/05)

Romney Has Cited Bin Laden Threat When Discussing Homeland Security

Romney Specifically Cited Bin Laden Threat In Discussing Security Plans For '04 Democratic National Convention In Boston. QUESTION: "You mentioned security preparations based on intelligence. How confident are you about the quality of intelligence about homeland security?" ROMNEY: "We get regular briefings. We have no difficulty getting information, but the information is limited. We don't have people who have infiltrated Al Qaeda around the world. We don't have people telling us what [Osama bin Laden] is planning on doing. We don't even know where he is. That is the nature of intelligence. It is seen through a glass darkly." (John Maggs, "Romney: 'A Chance To Serve,'" *National Journal*, 7/25/04)

Romney Wants To Double Size Of Guantanamo Bay Facility, Prompting Observers To Label The Idea "Weird"

 **Romney Says He Wants To "Double" Size Of Guantanamo Detention Facility.** "I'm glad [the terrorists are] at Guantanamo. I don't want them on our soil. I want them on Guantanamo, where they don't get the access to lawyers they get when they're on our soil. I don't want them in our prisons. I want them there. Some people have said, we ought to close Guantanamo. My view is, we ought to double Guantanamo." (Fox News Republican Presidential Debate, Columbia, SC, 5/15/07)

Regarding Romney's Plan To Double Size Of Guantanamo, *National Journal* Commented On "How Weird That Idea Sounds, Even To Conservative Supporters." "Remember in the debate when Romney promised to double Gitmo's size? His campaign crowed about how he distinguished himself from the rest of the field, but what it didn't realize – we think – is how weird that idea sounds, even to conservative supporters. Sometimes, Romney reminds us of our younger brother who, just because we were New York Giants fans, announced he loved the San Francisco 49ers." ("White House 2008 Rankings: The Republicans," *NationalJournal.com*, 5/18/07)

Romney Disagreed With 2006 Supreme Court Ruling That Military Tribunals At Guantanamo Bay Violated Geneva Conventions. "Gov. Mitt Romney of Massachusetts said Thursday that the U.S. Supreme Court ruling on Guantanamo Bay detainees was just another reason why the nation should elect a Republican president again in 2008 to get more conservative judges on the high court. ... The court declared 5-3 that the trials for 10 foreign terror suspects violate U.S. law and the Geneva conventions." (Ed Shearer, "Mass. Governor Disagrees With Ruling On Detainees In Cuba," *The Associated Press*, 6/29/06)

- **Romney:** "To apply the Geneva accords is very strange in my view ... It's hard to understand how a party who's not a nation comes under the Geneva convention." (Ed Shearer, "Mass. Governor Disagrees With Ruling On Detainees In Cuba," *The Associated Press*, 6/29/06)

Romney Supports "Enhanced Interrogation Techniques" For Detainees, Linking Himself To President Bush And Against Sen. McCain

Romney Supported President Bush And Opposed John McCain On Treatment Of Detainees. "Likewise, he [Romney] differs with McCain's stance against the U.S. military using interrogation techniques that McCain called 'cruel, inhuman or degrading treatment' on enemy detainees. 'I supported the president on that and did not back

the senator's perspective on that,' Romney said." (Paul Giblin, "Romney Testing Ariz. Political Waters," *East Valley Tribune*, 11/14/06)

- **Romney: "I Am Foursquare Behind The President" On Detainee Treatment.** "[Romney] said in an interview that he disagreed with Mr. McCain, and offered a forceful endorsement of Mr. Bush. 'I am foursquare behind the president on this,' Mr. Romney said. 'I believe that we should do everything possible to support those people at the front line who are responsible for enforcing the war on terrorism.'" (Adam Nagourney, "McCain, In New Hampshire, Gets An Earful From The Right," *The New York Times*, 9/18/06)

Romney Declined To Say Specifically What Forms Of Interrogation He Feels Are Acceptable Or Unacceptable. "Bush argued that forceful interrogation techniques are important in fighting terrorists. McCain countered that torture should be unacceptable by U.S. personnel. Romney declined to say specifically what forms of interrogation he feels are acceptable or unacceptable." (Paul Giblin, "Romney Testing Ariz. Political Waters," *East Valley Tribune*, 11/14/06)

Romney Said He Was "In A Different Place" Than McCain And Giuliani On Interrogation Of Detainees. FOX NEWS' CHRIS WALLACE: "Romney tried to separate himself from McCain and Giuliani this week in a newspaper interview. And let's put up on the screen what he said. He said, talking about McCain and Giuliani, 'We're in a different place on immigration. We're in a different place on campaign reform. We're in a different place on same-sex marriage. We're in a different place on the president's policy on interrogation of detainees.'" (Fox News' "Fox News Sunday," 11/26/06)

 **Romney Stated That In Extreme Scenario, The President – And Not CIA Interrogator – Must "Make The Call" To Use "Enhanced Interrogation Techniques," But "Not Torture."** "[T]here is no question but that in a setting like that, where you have the ticking bomb, that the president of the United States, not the CIA interrogator, the President of the United States has to make the call, and enhanced interrogation techniques have to be used. Not torture, but enhanced interrogation techniques, yes." (Mitt Romney, Fox News Republican Presidential Debate, Columbia, SC, 5/15/07)

CHINA

In December 2006, Romney Visited Tsinghua University, Audience "Snickered" At His Remarks. "Governor Mitt Romney's weeklong trip to Asia took him to the renowned Tsinghua University here yesterday, where he fielded questions from a sometimes skeptical audience of students and sketched out his views on China's emergence as a world power. ... 'The question is, for China, how will you use that power? And it is our hope that that power will be used to encourage peace and stability in the world,' Romney told a small group of mostly business school students. 'And ... my experience with my own country is this: We make mistakes as a country; every country does. Mistakes in information, mistakes in judgment. But never mistakes in purpose. America's purpose, I believe, has always been to help people, to expand their freedom, and to expand their prosperity and their hope.' But the audience snickered." (Jehangir S. Pocha, "Romney Tries Political Hand In China," *The Boston Globe*, 12/9/06)

Romney's Trip To Asia Was Seen As Effort To Boost Foreign Policy Credentials For Presidential Campaign. "Romney, a one-term governor who is likely to seek the GOP presidential nomination in 2008, is traveling to China, Japan, and South Korea on a trip widely seen as an attempt to add to his foreign policy credentials." (Jehangir S. Pocha, "Romney Tries Political Hand In China," *The Boston Globe*, 12/9/06)

Under Romney, Massachusetts Maintained Office And Consultant In Shanghai. "The state is among more than 20 with an office in China, and the Bay State employs a consultant based in Shanghai. But the consultant also works with Mississippi, Wisconsin and Minnesota, suggesting a potential dilution of resources at the state level." (Mark Hollmer, "Mass. Risks Missing Boat To China," *Boston Business Journal*, 11/20/06)

As Governor, Romney Focused On China To Get Foreign Policy Experience For Campaign. "Some political observers view Romney's interest in Asia through the prism of presidential politics. Romney, like many governors, is short on foreign policy experience. In the post-Sept. 11 world, it may be especially important for Romney to plug that hole in his resume, and speaking publicly and confidently about China might help him do it." (Scott S. Greenberger, "Romney's Focus On China Fuels Political Guessing," *The Boston Globe*, 5/31/05)

"Romney Said The United States Should Protect Intellectual Property Rights, Persuade China To Float Its Currency, And Push Beijing To Eliminate Trade Barriers That Block American Products." (Scott S. Greenberger, "Romney's Focus On China Fuels Political Guessing," *The Boston Globe*, 5/31/05)

Romney Made Veiled References To Human Rights Abuses During Visit To Massachusetts By Chinese Premier Wen Jiabao. “Chinese Premier Wen Jiabao praised growing trade ties between Chinese and Massachusetts companies and sampled farm-fresh vanilla ice cream during a series of appearances with state politicians and executives around the region yesterday, including a stop on behalf of China’s largest shipping line as it begins talks to renew an agreement with the port of Boston. ... Officials including Governor Mitt Romney and Boston Mayor Thomas M. Menino made some veiled references to human rights issues, such as when Romney mentioned the ‘brisk exchange of goods and ideas’ between the two nations at the luncheon.” (Ross Kerber, “Premier Embraces Ties With State,” *The Boston Globe*, 12/11/03)

Romney Made “Extraordinary Plea” To International Olympic Committee To Consider China For Olympic Games Despite Human Rights Abuses. “Salt Lake City’s chief Olympic organizer made an extraordinary plea Wednesday for Olympic officials to consider Beijing’s bid to host the 2008 Games on its technical merits and not be swayed by critics of China’s human-rights policies. Salt Lake Organizing Committee president Mitt Romney said the International Olympic Committee should take advantage of a ‘very unique time in history’ when superpowers are at peace by helping to open China to the world.” (Larry Siddons, “Salt Lake City Olympic Organizer Urges IOC To ‘Build Bridges’ With China Bid,” *The Associated Press*, 7/11/01)

- **Romney:** “The Olympics are about building bridges, not building walls ... We should not build walls that block communication with other countries, even if we vehemently disagree with their practices.” (Larry Siddons, “Salt Lake City Olympic Organizer Urges IOC To ‘Build Bridges’ With China Bid,” *The Associated Press*, 7/11/01)
- **Romney:** “They have practices, as reported in the media, that violate my sense of human rights, but we should not build walls even if we vehemently disagree with many of their practices ... Building bridges increases the possibility for spreading the ideas of civil societies.” (Margaret Coker, “In Home Stretch, Beijing Remains Front-Runner For 2008 Games,” *Cox News Service*, 7/12/01)

Pittsburgh Tribune-Review Criticized Romney’s “Naivete” On Policy Toward China, Calling Him “Romney Of The Rose-Colored Glasses.” “After a trek to Asia, Mr. Romney is convinced Chinese officials do not aspire to bury us, as did the former Soviet Union. China counts on a strong U.S. economy as a market for its goods, he told the Trib. But might Romney of the rose-colored glasses entertain the possibility that the new China, still inhabited by dedicated Marxists, has learned a lesson from the old Soviet Union’s errors? That cajolery, flattery and economic war are the preferred weapons against a superpower? The ‘competition’ between the U.S. and China is framed by sharply inconsistent worldviews and hence is deeply political and strategic. ... Against this backdrop, however, Mitt Romney says we can engage the Chinese in a partnership for peace. Peace? On whose terms?” (Editorial, “The China Equation: Romney’s Naivete,” *Pittsburgh Tribune-Review*, 5/2/07)

CUBA/VENEZUELA

Romney Backs U.S. Embargo On Cuba, Refers To Fidel Castro And His Regime As “Monsters”

Romney Supports The Current U.S. Embargo On Cuba. “Romney declared he supported the current U.S. embargo on Cuba to avoid enriching Cuban President Fidel Castro, a Communist dictator he accused of disrupting peace and stability in the region.” (Glen Johnson, “Romney Airs Spanish-Language Ad In Advance Of Florida Visit,” *The Associated Press*, 3/6/07)

- **“I Look Forward To The Day When The Stain Of Castro Is Finally Washed From The Soil Of Cuba,” Romney Said.**” (Erik Schelzig, “Fred Thompson Urged To Make ‘08 Run,” *The Associated Press*, 3/10/07)

Romney Wants To Have A Latin American Strategy To Improve Economic Ties and Rebuild Trust With Cuba. “At a dinner for Miami-Dade County Republicans, the former Massachusetts governor spoke about supporting the U.S. embargo with the island nation. He also called for a ‘Latin American strategy’ to improve economic ties, rebuild trust with countries in the region. (Erik Schelzig, “Fred Thompson Urged To Make ‘08 Run,” *The Associated Press*, 3/10/07)

Romney Called Castro “A Monster.” “Targeting his message to the Latin American and Cuban-American Republicans who dominated the crowd, he called Cuban leader Fidel Castro ‘a monster.’” (Brian E. Crowley, “Romney Launches Early Fla. Push,” *Palm Beach Post*, 3/10/07)

- **Romney: “As President, I Will Stand Side-By-Side With The Members Of This Community In Fighting The Menace Of The Cuban Monsters.”** (Beth Reinhard, “Romney Dodges Immigration Issue In South Florida,” *McClatchy Newspapers*, 3/10/07)

In March 2007, Romney Incorrectly Used Slogan Made Famous By Fidel Castro In Miami Speech To Cuban-American Activists

Romney Mistakenly Invoked Trademark Castro Phrase “Patria O Muerte, Venceremos” As Belonging “To A Free Cuba.” “People chuckled when presidential candidate Mitt Romney, a Mormon raised in Michigan and elected in Massachusetts, bungled the names of Cuban-American politicians during a recent speech in Miami. But when he mistakenly associated Fidel Castro’s trademark speech-ending slogan – Patria o muerte, venceremos! – with a free Cuba, listeners didn’t laugh. They winced. Castro has closed his speeches with the phrase – in English, ‘Fatherland or death, we shall overcome’ – for decades.” (Beth Reinhard, “Presidential Candidate Bungles Speech In Miami,” *Miami Herald*, 3/19/07)

- **“The Phrase, Which Means ‘Fatherland Or Death, We Shall Overcome,’ Was Bellowed As A Political Speech Sign-Off By The Dictator For Decades.”** (Dave Wedge, “Mitt’s Commie Phrase Sparks Rage,” *Boston Herald*, 3/20/07)

 **WSVN-TV’s Dave Kartunen: “Actually, That Phrase Belongs To Fidel Castro.”** WSVN’s DAVE KARTUNEN: “McCain shared a familiarity with the [Bay of Pigs] vets that was painfully lacking two weeks ago when former Massachusetts governor Mitt Romney made his play for Cuban hearts and votes while addressing the Miami-Dade Republican party.” ROMNEY: “Hugo Chavez has tried to steal an inspiring phrase. Excuse me with my pronunciation: ‘Patria o muerte, venceremos.’ It does not belong to him, it belongs to a free Cuba.” KARTUNEN: “Actually, that phrase belongs to Fidel Castro.” (WSVN’s “Channel 7 News At 5:30,” 3/21/07)

 **CNN’s Wolf Blitzer: “When Cuban-American Republicans Heard Presidential Candidate Mitt Romney Speak In Miami, Many Say They Thought They Were Listening To Fidel Castro.”** (CNN’s “The Situation Room,” 3/21/07)

Associated Press Noted That “Unlike Romney, Castro Would Switch To English” To Deliver Trademark Line. “In truth, the phrase does not belong to free Cubans. It has been the trademark speechmaking sign-off of their most despised opponent, Fidel Castro. And unlike Romney, Castro would switch to English to declare, ‘Fatherland or death, we shall overcome.’ The mistake pointed up Romney’s newness to the scene and the freshness of some of his positions.” (Glen Johnson, “Romney Works Through Checklist,” *The Associated Press*, 3/26/07)

 **CNN’s Mary Snow: Romney Made Impression On Cuban-American Group By Using Castro’s Catch Phrase, “Just Not The Kind He Wanted.”** “Republican presidential hopeful Mitt Romney was trying to make an impression with Cuban-American Republicans in Miami earlier this month. He made one – just not the kind he wanted. After using a communist catch phrase made famous by Cuban dictator Fidel Castro, the crowd took notice.” (CNN’s “The Situation Room,” 3/21/07)

-  **Snow: “Romney Was Speaking To A Packed House, But His Attempt To Sound Familiar, Say Some Cuban-Americans, Fell Flat.”** (CNN’s “The Situation Room,” 3/21/07)

Invocation Of Castro Slogan Was Not The Only Mistake Romney Made During Speech

Romney Called Florida State House Speaker Marco Rubio (R) “Mario.” “At another point in the speech to the Miami-Dade Republican Party, Romney bungled the names of prominent Cuban GOP politicians, referring to Florida House Speaker Marco Rubio as ‘Mario.’” (Dave Wedge, “Mitt’s Commie Phrase Sparks Rage,” *Boston Herald*, 3/20/07)

Romney Also Mispronounced The Names Of U.S. Reps. Lincoln And Mario Diaz-Balart (R). “State Rep. Rene Garcia, for one, said he was ‘unimpressed.’ The Hialeah Republican grimaced when Romney called the state House Speaker ‘Mario Rubio’ – his first name is Marco – and mispronounced the names of U.S. Reps. Mario and Lincoln Diaz-Balart. ‘He used the Cuba issue way too much,’ Garcia said. ‘I don’t want to judge a man based on one speech alone, but it bothered me that he didn’t get the names right.’” (Beth Reinhard, “Presidential Candidate Bungles Speech In Miami,” *Miami Herald*, 3/19/07)

Romney “Punctuated” His Speech With Line Made Famous In Movie “Scarface,” Prompting Concerns Over Stereotyping Of Cuban Immigrants. “Romney punctuated his speech with ‘Libertad, libertad, libertad!’ to show his support for freedom in Cuba. But to some, he was echoing a line from *Scarface*, a movie notorious for its stereotyped portrayal of Cuban immigrants.” (Beth Reinhard, “Presidential Candidate Bungles Speech In Miami,” *Miami Herald*, 3/19/07)

Local Activists Were Not Pleased By Romney's Error-Filled Remarks

Cuban-American Activists Described As “Steaming Mad” Over Romney’s Botched Speech In Miami. “Cubans in Miami are steaming mad at former Gov. Mitt Romney for shooting his mouth off in stumbling Spanish, mispronouncing names and erroneously associating a notorious Fidel Castro-spewed Communist catch phrase with freedom fighters. Politicians in South Florida have lashed out at the former Massachusetts governor and 2008 presidential hopeful for describing the socialist saying ‘Patria o muerte, venceremos’ as ‘inspiring’ and for claiming the phrase was swiped from liberty-seeking Cubans by leftist admirers of Castro.” (Dave Wedge, “Mitt’s Commie Phrase Sparks Rage,” *Boston Herald*, 3/20/07)

“Ana Navarro, A Miami-Based Former United Nations Ambassador Who Was At The Event, Called The Quote ‘A Mistake’ By ‘An Empty Suit.’” (Dave Wedge, “Mitt’s Commie Phrase Sparks Rage,” *Boston Herald*, 3/20/07)

-  **Navarro Called Romney’s Remarks “Wrong ... Offensive ... Inappropriate.”** “[Romney] was just parroting words that had been prepared for him, and he obviously does not know enough to know that these words are wrong and are offensive and are just inappropriate.” (CNN’s “The Situation Room,” 3/21/07)

State Rep. Rene Garcia (R) Said Romney Needed To Be “A Little Better-Prepared” And Had “Left A Negative Taste.” “[State Rep. Rene] Garcia said Romney was ‘ill-advised’ to mention the saying at all, especially speaking in Miami, the epicenter of the Cuban-American struggle. ‘When you come into our community, you should be a little better-prepared,’ Garcia said, adding that the incident ‘left a negative taste with local officials.’” (Dave Wedge, “Mitt’s Commie Phrase Sparks Rage,” *Boston Herald*, 3/20/07)

Prominent Cuban-Americans Strenuously Disagreed With Repeated Assertion By Romney And His Aides That Phrase “Belongs To A Free Cuba”

Days After Speech, Romney Campaign Still Maintained Phrase “Belongs To A Free Cuba.” “Romney spokesman Eric Fehrnstrom said of the flap: ‘The point is, the phrase belongs to liberators, not oppressors. It doesn’t belong to Fidel Castro. It doesn’t belong to Hugo Chavez. It belongs to a free Cuba.’” (Dave Wedge, “Mitt’s Commie Phrase Sparks Rage,” *Boston Herald*, 3/20/07)

“Cuban Politicians Fumed That The Term Was Coined By Castro’s Regime And Has Always Been A Communist Catchphrase.” “Romney said the phrase ‘does not belong’ to Castro and should be returned to ‘a free Cuba.’ ... Despite Romney’s explanation, Cuban politicians fumed that the term was coined by Castro’s regime and has always been a Communist catchphrase. ‘Whoever prepared him or advised him on this particular subject didn’t do a good enough job,’ [Hialeah City Council President Esteban] Bovo said.” (Dave Wedge, “Romney Takes Heat In Florida,” *Boston Herald*, 3/21/07)

The Phrase “Has Always Been A Communist Rallying Cry ... It Represents The Very Essence Of Fidel Castro’s Oppressive Regime.” “‘Hugo Chavez has tried to steal an inspiring phrase - Patria o muerte, venceremos,’ Romney said. ‘It does not belong to him. It belongs to a free Cuba.’ But scholars and prominent Cubans contend the saying has always been a Communist rallying cry and that it represents the very essence of Fidel Castro’s oppressive regime.” (Dave Wedge, “Mitt’s Commie Phrase Sparks Rage,” *Boston Herald*, 3/20/07)

- **University Of Miami Professor Jaime Suchlicki: “It Belongs To Fidel ... I Don’t Know Where [Romney] Got That.”** “‘Hugo Chávez has tried to steal an inspiring phrase – Patria o muerte, venceremos,’ Romney said. ‘It does not belong to him. It belongs to a free Cuba.’ No, it doesn’t, said University of Miami Professor Jaime Suchlicki. ‘It belongs to Fidel,’ said Suchlicki, an expert on Cuban history. ‘I don’t know where [Romney] got that.’” (Beth Reinhard, “Presidential Candidate Bungles Speech In Miami,” *Miami Herald*, 3/19/07)
- **State Rep. Rene Garcia (R): “It Means Communism. It Means Fidel Castro ... It’s A Communist Catch Phrase.”** (Dave Wedge, “Mitt’s Commie Phrase Sparks Rage,” *Boston Herald*, 3/20/07)
- **Cuban Scholar Sandra Levinson: “[It] Was Never A Cry Of The Old Cuba.”** “Sandra Levinson, executive director of the Center for Cuban Studies in New York City, said the Castro quote ‘was never a cry of the old Cuba’ and was coined by Castro and his supporters.” (Dave Wedge, “Mitt’s Commie Phrase Sparks Rage,” *Boston Herald*, 3/20/07)
- **Activist Ana Navarro: “It’s A Fidel Castro Phrase. I’ve Never Heard It From Anyone Other Than Fidel Castro Or Members Of His Government.”** (Dave Wedge, “Mitt’s Commie Phrase Sparks Rage,” *Boston Herald*, 3/20/07)

Romney Praised Plan By Venezuelan President Hugo Chavez To Provide Low-Income Massachusetts Residents With Discounted Heating Oil, Declined To Criticize Chavez

In 2005, Romney Praised Plan By Venezuelan Government And Hugo Chavez To Provide Americans With Subsidized Oil. “The first deliveries of cheap Venezuelan heating oil to cash-strapped Massachusetts residents will not arrive for weeks, but the deal involving President Hugo Chavez already is generating political heat on both sides. ... Tensions have run high recently between Bush and Chavez, a self-styled socialist who assails American-style capitalism and has branded Bush a ‘madman.’ ... Venezuela’s Citgo Petroleum Corp. promoted its plan to offer 12 million gallons of cut-rate oil this winter with the headline: ‘How Venezuela is Keeping the Home Fires Burning In Massachusetts.’” (Andrew Miga, “Venezuela’s Deal To Provide Cheap Oil To Some In Mass. Draws Heat,” *The Associated Press*, 12/1/05)

At The Time, Romney Pronounced Himself “Delighted” With Plan, Declined To Criticize Chavez. “Governor Mitt Romney yesterday hailed the accord, though he declined to discuss Chavez. ‘I’m delighted to hear we’ll be able to purchase oil at a lower price than the market for our citizens,’ he said.” (Raja Mishra, “Fuel Pact Defended At Local Signing,” *The Boston Globe*, 11/23/05)

- **Romney Offered Thanks To “All Of Those Around The World Working To Get Lower-Priced Energy To Us.”** “Gov. Mitt Romney, a Republican like President Bush, cheered the agreement during a Statehouse news conference, saying, ‘I want to say thanks to Congressman Delahunt and all of those around the world working to get lower-priced energy to us.’” (Mark Jewell, “Venezuela To Provide Discounted Heating Oil To Massachusetts,” *The Associated Press*, 11/22/05)

Plan Called “Political Move” By Chavez “Designed To Compromise The White House’s Domestic Position” And Extend His Influence In The World. “The plan in Massachusetts is ‘eminently a political move’ designed to compromise the White House’s domestic position, said Patrick Esteruelas, an analyst with the New York-based Eurasia Group. He said it was also a way to emphasize what Chavez has long cited as the failings of U.S. policy. The initiative is part of a larger effort by Chavez to use Venezuela’s surging oil wealth to extend the country’s influence.” (Mark Jewell, “Venezuela To Provide Discounted Heating Oil To Massachusetts,” *The Associated Press*, 11/22/05)

Chavez Is Accelerating Energy Showdown With United States Over Venezuela’s Massive Oil Reserves

Chavez’s Plan To Seize Control Of Venezuelan Oil Projects From Western Companies Augurs Potential “Showdown” Over Energy Fields. “With President Hugo Chávez setting a May 1 deadline for an ambitious plan to wrest control of several major oil projects from American and European companies, a showdown is looming here over access to some of the most coveted energy resources outside the Middle East. ... [T]his confrontation could easily end up with everyone losing. the biggest energy companies could be squeezed out of the most promising oil patch in the western hemisphere.” (Simon Romero and Clifford Krauss, “High Stakes: Chávez Plays The Oil Card,” *The New York Times*, 4/10/07)

- **Energy Consultant Michael J. Economides: Chavez Bigger Threat To U.S. Energy Security Than Saddam Hussein Ever Was.** “We are on a collision course with Chávez over oil ... Chávez poses a much bigger threat to America’s energy security than Saddam Hussein ever did.” (Simon Romero and Clifford Krauss, “High Stakes: Chávez Plays The Oil Card,” *The New York Times*, 4/10/07)

Chavez Currently Spearheading Government Takeover Of Oil Field So Large “It Could Give The Country More Reserves Than Saudi Arabia.” “Mr. Chávez recently decreed that Venezuela would take control of heavy oil fields in the Orinoco Belt, a region southeast of Caracas of so much potential that some experts say it could give the country more reserves than Saudi Arabia. The United States Geological Survey describes the area as the ‘largest single hydrocarbon accumulation in the world,’ making it highly coveted despite Mr. Chávez’s erratic policies.” (Simon Romero and Clifford Krauss, “High Stakes: Chávez Plays The Oil Card,” *The New York Times*, 4/10/07)

GENERAL ISSUES

April 2007: Romney Echoed John Kerry’s Past Calls For International “Summit” On Islamic World

Romney Said One Of His First Acts As President Would Be “Summit Of Nations” On State Of Islamic World. “As one of my first acts as President, I would call for a Summit of Nations. In addition to the United States, the convening countries would include moderate Islamic states and other leading developed nations. The objective of the Summit would be to create a worldwide strategy to support Muslim nations and peoples, in their

effort to defeat radical, violent Jihad.” (Mitt Romney, Remarks At George Bush Presidential Library Center, College Station, TX, 4/10/07)

John Kerry In 2003: “I Will Immediately Convene A Summit” To Discuss “A Long-Term Strategy To Build Bridges To The Islamic World.” “As president, I will work aggressively to rebuild the relationships frayed and shredded by the Bush administration, particularly with our NATO allies. I will immediately convene a summit with European and world leaders to discuss a common anti- terrorism agenda, including a collective security framework and a long-term strategy to build bridges to the Islamic world.” (Sen. John Kerry, Remarks To Council On Foreign Relations, New York, NY, 12/3/03)

- **Kerry:** “I know I can do a better job in Iraq, where I have a plan to have a summit with all of the allies, something this President has not yet achieved, not yet been able to do to bring people to the table.” (Sen. John Kerry, Presidential Debate, Coral Gables, FL, 10/1/04)
- **Kerry:** “I’m going to hold that summit. I will bring fresh credibility, a new start, and we will get the job done right.” (Sen. John Kerry, Presidential Debate, Coral Gables, FL, 10/1/04)
- **Kerry:** “The President should convene a summit meeting of the world’s major powers and Iraq’s neighbors, this week, in New York, where many leaders will attend the U.N. General Assembly.” (Sen. John Kerry, Remarks In New York, NY, 9/20/04)
- **Kerry:** “What we need now is a President who understands how to bring these other countries together to recognize their stakes in this. ... But this President hasn’t even held the kind of statesman-like summits that pull people together and get them to invest in those stakes.” (Sen. John Kerry, Presidential Debate, Coral Gables, FL, 10/1/04)

April 2007: Romney Called For Nuclear Trafficking Initiative That Resembled Proposal By Liberal Princeton Scholar

Romney Wants To Appoint Ambassador At-Large For Nuclear Proliferation. “Republican Mitt Romney would appoint an ambassador-at-large to prevent nuclear terror if elected president, arguing that avoiding a terrorist attack with unsecured nuclear weapons should take on heightened urgency in the United States. The Republican candidate ... says such a person would have the authority and resources to cross agency and departmental boundaries, ensuring nonproliferation strategies are coordinated at home and abroad.” (Glen Johnson, “Romney Favors Ambassador To Deter Nukes,” *The Associated Press*, 4/25/07)

Romney Would Push International Effort To Make Nuclear Trafficking “A Crime Against Humanity, On A Par With Genocide And War Crimes.” “Further, I would promote an international initiative to develop a new body of international law that would make nuclear trafficking a crime against humanity, on a par with genocide and war crimes,” according to a text of Romney’s remarks provided to The Associated Press. ‘By allowing for universal jurisdiction, charges can be brought up in any court preventing traffickers from hiding in complicit or weak countries.’” (Glen Johnson, “Romney Favors Ambassador To Deter Nukes,” *The Associated Press*, 4/25/07)

Princeton Graduate School Dean Anne-Marie Slaughter, In March 3 Op-Ed: Nuclear Trafficking Is “Crime Against Humanity” That “Merits A Place ... Alongside Genocide And Other Evils.” “[W]e should make the illegal transfer of nuclear materials a crime against humanity triable by international tribunals and by national courts in every country ... Making nuclear transfer a crime against humanity captures the enormity of the offense and would dramatically increase the cost of getting caught. Nuclear transfer threatens the lives of millions of people. It merits a place in infamy alongside genocide and other evils.” (Anne-Marie Slaughter and Thomas Wright, Op-Ed, “Punishment to Fit the Nuclear Crime,” *The Washington Post*, 3/2/07)

- **Speculation Exists That Slaughter “Could Become Secretary Of State In A Democratic Administration.”** “In a recent speech in San Diego, retired Adm. Bobby Inman said President Vladimir Putin seized control of the Yukos oil firm not just because its owner engaged in politics, but because Putin wanted the Russian state to control the energy industry. ... Also speaking was Anne-Marie Slaughter, a Princeton dean, who some say could become secretary of state in a Democratic administration.” (David Gaddis Smith, “Russia Superpower Status Linked To Oil, Ex-CIA Official Says,” *The San Diego Union-Tribune*, 3/4/07)
- **Slaughter Donated \$1500 To Barack Obama’s Presidential Campaign In March 2007.** “Democratic presidential candidate Sen. Barack Obama, a graduate of Columbia and Harvard Law School, is thus far the most popular candidate for donations from University employees. ... Obama received \$2,250 from a total of

four contributors, including Dean of the Wilson School Anne-Marie Slaughter '80, who donated \$1,500 in late March..." (Angela Cai, "Obama Has Most Faculty Donations," *The Daily Princetonian*, 4/20/07)

- **Slaughter Has Recommended Setting Withdrawal Deadline In Iraq.** "Slaughter recommended setting a withdrawal deadline – perhaps the end of 2008, as Democratic candidate Barack Obama has suggested, to spur Iraqis to 'end this civil war.'" (Cris Barrish, "Biden Supports Three-Part Iraq Split," *The News Journal* [Wilmington, DE], 3/4/07)

Romney: "By allowing for universal jurisdiction, charges can be brought up in any court preventing traffickers from hiding in complicit or weak countries." (Glen Johnson, "Romney Favors Ambassador To Deter Nukes," *The Associated Press*, 4/25/07)

- **Slaughter:** "[A]s a matter of international law, crimes against humanity are subject to universal jurisdiction. That means that any nation, including the United States, could prosecute nuclear traders anywhere in the world. ... Failing states would no longer provide safe haven for rogue individuals." (Anne-Marie Slaughter and Thomas Wright, Op-Ed, "Punishment to Fit the Nuclear Crime," *The Washington Post*, 3/2/07)

Romney: "Romney says the acts of black marketeers trying to sell so-called loose nukes 'should not be dismissed with the kind of nonchalance that accompanies routine violations of the law.'" (Glen Johnson, "Romney Favors Ambassador To Deter Nukes," *The Associated Press*, 4/25/07)

- **Slaughter:** "Creating a nuclear transfer taboo would strip away feigned protestations of innocence and illusions of a victimless crime. It would stigmatize black-market financiers and other facilitators of nuclear transfers as the ultimate merchants of death." (Anne-Marie Slaughter and Thomas Wright, Op-Ed, "Punishment to Fit the Nuclear Crime," *The Washington Post*, 3/2/07)

In 1994, Romney Changed His Mind On Military Intervention In Haiti, First Saying It Should Be Option Then Declaring Total Opposition

July 1994: Romney Said Military Option In Haiti Should Be On The Table If Diplomacy Failed. "Republican US Senate candidate Mitt Romney, who is now attacking Sen. Edward M. Kennedy for supporting an invasion of Haiti, said two months ago he 'would not take it off the table' as an option for restoring democracy there. Speaking at a July 12 reporters' breakfast in Washington, Romney said, 'I favor a multilateral approach to Haiti, and I would not take off the table any of the options' including military action. 'I don't believe that our first option by any means should be military. I believe that we should offer diplomatic solutions prior to those. But if nothing worked . . . the other course would be military,' Romney said." (Peter Howe, "Invasion 'Option' Cited By Romney," *The Boston Globe*, 9/18/94)

September 1994: Romney Declared Total Opposition To Military Action In Haiti. "Accusing US Sen. Edward M. Kennedy of ducking the issue, Republican US Senate hopeful Mitt Romney yesterday declared his opposition to an invasion of Haiti and called on Kennedy to make his own position clear. ... Romney said he was opposed to an invasion because he felt that no 'substantial US interest like our national security, the safety of our citizens or the security of our economy' is at stake." (Scot Lehigh, "Romney Assails Kennedy On Haiti," *The Boston Globe*, 9/17/94)

DOMESTIC POLICY

EXECUTIVE SUMMARY

Campaign Finance Reform

- In 2002, Romney proposed installing 10 percent tax on private donations to political campaigns.
- Romney praised McCain at campaign rally shortly before 2002 election, saying he shared McCain's "values"
- Romney once proposed capping spending on elections, abolishing PACs and "tightening regulations."
- *National Review's* Ramesh Ponnuru said Romney once held campaign finance positions "to the left of McCain-Feingold."

Immigration

- In November 2005, Romney said McCain immigration plan was "quite different" from amnesty and called plan "reasonable."
- Romney in 2005: "I think an amnesty program is what – which is all the illegal immigrants who are here are now citizens, and walk up and get your citizenship. What the president has proposed, and what Senator McCain and Cornyn have proposed, are quite different than that."
- In March 2006, Romney supported "path toward citizenship" for illegal immigrants.
- Romney in 2006: "Those that are here paying taxes and not taking government benefits should begin a process towards application for citizenship."
- Romney in 2006: "The 11 million or so that are here are not going to be rounded up and box-carted out of America."
- Romney's current immigration stance is at odds with top FL Republicans like Jeb Bush, Charlie Crist and Mel Martinez as he places emphasis on Florida in quest for GOP nomination.
- Romney mischaracterized former Gov. Jeb Bush's immigration position, comparing his own initiative to let state police arrest illegal immigrants to a more limited, terrorism-focused program initiated by Bush in wake of 9/11 attacks.
- Romney has failed to clearly articulate any plan for dealing with the estimated 12 million illegal immigrants in the U.S.
- For more than a decade, Romney used services of company heavily reliant on illegal immigrant labor to perform landscaping duties at his home.
- While Romney was governor, state of Massachusetts approved government contract for New Bedford firm raided in early 2007 for massive immigration law violations.

Environment and Energy

- In 2003, Romney said, "I think the global warming debate is now pretty much over."
- As governor, Romney was open to "regional cap and trade" system to address global warming – saying "now is the time to take action" – but later pulled Massachusetts out of regional agreement on same day he announced he would not seek reelection.
- In 2004, a Romney press event announcing new state policy to combat global warming was marred by his refusal to admit global warming is actually happening.

- As candidate for governor, Romney proposed increasing excise taxes on vehicles with high gas mileage – otherwise known as an “SUV tax.”
- Romney has been open to raising the federal gas tax in the past and has not ruled it out in the future.
- In 2007 television appearance, Romney refused to rule out a carbon tax or carbon caps if elected president.
- Romney teamed with Sen. Ted Kennedy to oppose renewable energy project on Cape Cod known as “Cape Wind.”

Health Care

- Romney changed positions on importing cheaper prescription drugs from Canada – first supporting it, now opposing it.
- Romney called rate of growth of prescription drug costs “outrageous” and said Medicare drug benefit passed in 2003 was too expensive and criticized the Bush Administration for failing to enact broader reforms.
- Romney’s health insurance reform plan has been assailed by conservative health care experts as “a gourmet recipe for runaway spending” and praised by Ted Kennedy, Hillary Clinton and John Kerry.
- Romney once called his state’s health insurance law a “once in a generation” achievement.
- *Wall Street Journal* said Romney oversold virtues of healthcare plan, imposed government mandate and now distances himself from own policy.
- Plan is encountering higher costs and more bureaucracy than Romney promised, as officials warn costs must be controlled or the program will be unsustainable.
- Plan will cost millions more than anticipated while exempting 20% of uninsured from coverage mandate.
- Romney health plan expanded access to abortion, required Planned Parenthood representative on state policy panel.

CAMPAIGN FINANCE REFORM

Romney Frequently Attacks McCain-Feingold, Promising He Will Fight To Repeal It

At CPAC In 2007, Romney Said “I Will Fight To Repeal McCain-Feingold.” “Time and again, judges add things that aren’t in the Constitution, and they take away things that are in the Constitution. And in that regard, they let the campaign finance lobby take First Amendment rights. If I’m elected president, I will fight to repeal McCain-Feingold.” (Mitt Romney, Remarks At Conservative Political Action Conference, Washington, DC, 3/2/07)

February 2007: Romney Called McCain-Feingold “A Terrible Piece Of Legislation ... It Hasn’t Taken The Money Out Of Politics ... (But) It Has Hurt My Party.” “Romney noted his foe from Arizona wrote the McCain-Feingold campaign finance reform law that restricts certain types of contributions. ‘That’s a terrible piece of legislation,’ Romney said. ‘It hasn’t taken the money out of politics. ... (But) it has hurt my party.’” (Lee Bandy, “Romney Targeting McCain,” *The State*, 2/4/07)

Meeting With House Conservatives In 2007, Romney Got “Biggest Applause Line” By Calling McCain-Feingold “One Of The Worst Things In My Lifetime.” “While several Republicans who attended the Republican Study Committee (RSC) retreat greeted Romney’s remarks on abortion with skepticism, his condemnation of changes to campaign-finance rules struck a positive chord with the entire audience. Romney specifically criticized the 2002 Bipartisan Campaign Reform Act sponsored by his rival for the GOP presidential nomination, Sen. John McCain (R-Ariz.). ‘Referring to the bill, [Romney] called it “one of the worst things in my lifetime,”’ one conservative Republican said. ‘The place erupted. That was by far the biggest applause line.’” (Alexander Bolton, “Romney’s About-Face On Campaign Funding,” *The Hill*, 2/8/07)

Romney, In November 2006: “I’m Not In Favor Of McCain-Feingold.” “I’m not in favor of McCain-Feingold. The campaign finance reform provisions didn’t do what they were intended to do. There’s more money in politics and it’s more hidden, not more open.” (Phil Riske, “Interview With Mitt Romney: Governor Of MA,” *Arizona Capitol Times*, 11/17/06)

Romney Praised McCain’s Reform Message Just Months After McCain-Feingold Was Signed Into Law

Concord Monitor: Romney “Praised McCain For His General Reform Campaign When The Arizona Senator Came To Massachusetts” To Campaign In 2002. “Romney also praised McCain for his general reform campaign when the Arizona senator came to Massachusetts to stump with Romney just before Romney’s 2002 election victory in the governor’s race. ‘He has always stood for reform and change. And he’s always fought the good battle, no matter what the odds,’ Romney said at the time. ‘Those are my values.’” (Eric Moskowitz, “Romney, McCain Spar On Campaign Finance,” *Concord [NH] Monitor*, 4/27/07)

October 2002: Romney Praised McCain’s Fight For “Reform And Change,” Saying “Those Are My Values” And “That’s What I Want To Do As Governor.” “One of the reasons the people of America honor Senator McCain and why I’m so proud to have him standing with me today is that he has brought American values to the debate on the issues we care about. He has always stood for reform and change. And he’s always fought the good battle, no matter what the odds. Those are my values. That’s what I want to do as Governor.” (Mitt Romney, Remarks At Campaign Rally, <http://web.archive.org>, 10/30/02)

In 2002, Congress Passed McCain-Feingold Campaign Finance Reform, Was Signed Into Law By President Bush. “President Bush quietly signed into law Wednesday an overhaul of campaign-finance laws intended to limit the influence of money in races for the White House and Congress. ... The low-key signing was an anticlimactic denouement to a high-profile, seven-year quest for reform by Sens. John McCain, R-Ariz., and Russ Feingold, D-Wis., and their House allies, Republican Christopher Shays of Connecticut and Democrat Marty Meehan of Massachusetts.” (Laurence McQuillan and Jill Lawrence, “Bush Signs Campaign-Finance Bill,” *USA Today*, 3/28/02)

In 1997, Romney Attended McCain Speech On Campaign Finance Reform, Praised McCain’s “Integrity” And Independent Voice”

In 1997, Romney Attended McCain Speech On Campaign Finance Reform At Harvard And Praised McCain’s “Integrity” And “Independent Voice.” “With the bill he is co-sponsoring with Senator Russell Feingold (D-Wis.) scheduled to go to the Senate floor today, McCain argued the need for reform to a crowd of at least 800 college and graduate students, Kennedy fellows, and guests. Among those in attendance were Massachusetts Senator John F. Kerry, a Democratic supporter of the McCain Feingold bill, and W. Mitt Romney, who challenged Democratic Senator Edward M. Kennedy ‘54-’56 of Massachusetts in Kennedy’s 1996 re-election bid. In an interview with *The Crimson*, Romney mentioned his esteem for McCain’s integrity and his wartime service, calling him an ‘independent voice among Republican leaders.’ ‘I think the years he spent in a Hanoi prison taught him to be impatient and get to the truth,’” Romney said.” (Jacqueline Newmyer, [“McCain Urges Reform at Forum.”](#) *The Crimson*, 10/7/97)

Romney Once Supported Taxing Political Donations and Imposing Spending Caps

The Hill: “[R]omney ... Once Touted Dramatic Restructuring Measures Such As Taxing Political Contributions And Placing Spending Limits On Federal Campaigns.” “Former Massachusetts Gov. Mitt Romney, who strongly criticized campaign-finance regulations in a private meeting with House conservatives last week, once touted dramatic restructuring measures such as taxing political contributions and placing spending limits on federal campaigns. Romney’s past positions on campaign-finance regulation, anathema to many social conservatives who believe such rules place unconstitutional limits on free speech, could complicate his ongoing efforts to court conservative leaders.” (Alexander Bolton, “Romney’s About-Face On Campaign Funding,” *The Hill*, 2/8/07)

“A Review Of Romney’s Public Statements From His 1994 Senatorial And 2002 Gubernatorial Campaigns Reveal That He Once Touted Stringent Campaign-Finance Modifications.” (Alexander Bolton, “Romney’s About-Face On Campaign Funding,” *The Hill*, 2/8/07)

National Review’s Ramesh Ponnuru: Romney Has Taken Positions That “Place Him To The Left Of McCain-Feingold.” “Romney, it turns out, has – surprise, surprise – been on both sides of campaign-finance reform. In his 1994 race, Romney came out for banning political action committees, limiting spending on federal races (something the Supreme Court has not allowed), and opposed allowing larger contributions. All told, those positions place him to the left of McCain-Feingold, which doubled the allowable size of individual donations to candidates.” (Ramesh Ponnuru, “The Candidates On Campaign Finance,” *National Review’s The Corner Blog*, 3/6/07)

Washington Post Editorial Noted Romney's "Dramatic And Wrongheaded Turnaround" On Campaign Finance Reform, Saying "Massachusetts Romney Had It Right." "Mr. Romney has turned campaign finance reform into one of his stump villains – which represents a dramatic and wrongheaded turnabout from his days running for office in Massachusetts. ... No doubt, the current campaign finance system is flawed; no doubt, some spending has been shifted into areas exempt from disclosure. But if Mr. Romney thinks the system was less corrupt when lawmakers were able to phone up special interests and ask them for seven-figure checks, he is wrong. If he thinks the system was less corrupt when corporations, labor unions and wealthy individuals could spend unlimited amounts on campaign commercials barely disguised as 'issue' advertising, he is wrong about that as well. Massachusetts Romney had it right." (Editorial, "Campaign Finance Flip," *The Washington Post*, 5/25/07)

The Hill's A.B. Stoddard Called Campaign Finance Reform "Another One Of Mitt's Murky Issues." "Romney thinks he has found a winner in campaign finance reform. ... Unfortunately, one can readily access enough contradictory statements from Romney's pre-conversion period of his career to find that campaign finance reform is indeed another one of Mitt's Murky Issues." (A.B. Stoddard, "No Momentum For Mitt," *The Hill's Pundits Blog*, 4/26/07)

Romney Campaign Response: "1994 Was 15 Years Ago." "Kevin Madden, Romney's campaign spokesman, declined to comment about campaign finance proposals his boss made in 1994 and 2002. 'He believes there ought to be transparency and disclosure in a way so the public knows who's raising money and who's contributing money,' said Madden. 'Right now I can say we make every effort that the campaign adheres to the disclosure and transparency requirements of campaign finance law now; 1994 was 15 years ago.' Madden reiterated Romney's belief that the 2002 campaign law hindered public participation." (Alexander Bolton, "Romney's About-Face On Campaign Funding," *The Hill*, 2/8/07)

- **Family Research Council's Tom McClusky:** "[T]his was Mitt Romney in 2002. Who knows? He might have changed his mind on that ... He always seems to want to come back to the table." (Alexander Bolton, "Romney's About-Face On Campaign Funding," *The Hill*, 2/8/07)

Center For Individual Freedom's Jeff Mazzella: "We're Adamantly Opposed To The Idea Of Taxing Campaign Donations, Or Eliminating PACs Or Any Abridgement Of The People's Right To Assemble Or Speak." "Jeff Mazzella, the president of the Center for Individual Freedom, another conservative advocacy group, has published harsh criticisms of McCain because of his support for various campaign regulations. He was surprised to hear of Romney's past positions. 'I was not familiar [with] Romney's positions referenced in the articles you stated,' Mazzella said in an interview. 'We're adamantly opposed to the idea of taxing campaign donations, or eliminating PACs or any abridgement of the people's right to assemble or speak.'" (Alexander Bolton, "Romney's About-Face On Campaign Funding," *The Hill*, 2/8/07)

In 2002, Romney Pushed Plan To Tax Campaign Contributions To Publicly Fund Campaigns

Romney Proposed Installing 10 Percent Tax On Private Donations To Political Campaigns. "Mr. Romney campaigned in favor of clean elections, which provides public money to candidates for state office who meet strict fund-raising requirements. But he suggested an alternative funding method. Instead of providing campaign funds from state coffers, his plan would tap 10 percent of the fund raising of candidates who choose to raise money privately." (Richard Nangle, "Clean Election Advocates Keep Pushing," *Telegram & Gazette* [Worcester, MA], 11/14/02)

- **"Romney Said ... He Would Impose A 10 Percent Tax On Campaign Contributions And Use The Money To Pay For Publicly Funded Campaigns."** (Tom Benner, "Candidates Differ On Public Funding," *The Patriot Ledger*, 10/15/02)
- **Romney Touted His Plan As Funding Solution For State's Clean Elections Law.** "The people of Massachusetts approved the Clean Elections law, but funding for this program has been low on the list of state priorities ... I have a plan to shift part of the financing costs to politicians, which will spare taxpayers the burden of shouldering the entire expense of this program." (Tom Benner, "Candidates Differ On Public Funding," *The Patriot Ledger*, 10/15/02)

"Romney's 10% Tax On Free Speech Would Have Applied Even To Money That Candidates Paid Out Of Their Own Pockets Into Their Own Campaigns." (Deroy Murdock, "Mitt Romney's Swett Problem," *HumanEvents.com*, 3/6/07)

Reform Advocates Were Skeptical Of Romney's Plan. "Clean Elections supporters call the Romney plan unworkable and unconstitutional. ... Romney remains committed to funding the Clean Elections law, said his

spokesman, Eric Fehrstrom. He also said Romney believes his alternative funding scheme will work.” (Tom Benner, “Candidates Differ On Public Funding,” *The Patriot Ledger*, 10/15/02)

Romney Reiterated Support For 10% Tax On Political Contributions After Signing FY2004 Budget. “During the campaign, [Romney] proposed a way to shift the burden off of the taxpayers and onto the politicians themselves. Under his plan, political candidates who do not abide by the spending and fundraising limits would transfer 10 percent of their receipts in order to subsidize qualified candidates who abide by the limits.” (Gov. Mitt Romney, Press Release, 6/30/03)

In 1994, Romney Proposed Capping Spending On Elections, Abolishing PACs And “Tightening Regulations”

Romney Proposed Spending Cap On Congressional Elections. “Romney also said he advocates spending limits on congressional elections, even suggesting that the current race against Sen. Edward M. Kennedy should have a \$6 million spending cap.” (Frank Phillips, “Romney, Vowing To Live It, Touts Congress Reform Plan,” *The Boston Globe*, 7/27/94)

- **Romney: “Political Institutions Must Respond To Real People. If They Don’t, It’s A Slap At Democracy.”** (Frank Phillips, “Romney, Vowing To Live It, Touts Congress Reform Plan,” *The Boston Globe*, 7/27/94)
- **Romney Called For Abolishing PACs, Tightening Regulations.** “As for campaign finance reform, Romney called for abolishing political action committees and tightening regulations of the process by which limits on campaign contributions to individuals can be legally bypassed.” (Frank Phillips, “Romney, Vowing To Live It, Touts Congress Reform Plan,” *The Boston Globe*, 7/27/94)

In 1994, Romney Railed Against Influence Of Money In Politics And Attacked Special Interest Groups

 **Romney Decried That Politicians Were “Forced To Cozy Up ... To All The Special Interest Groups” To Raise Campaign Contributions.** “I am personally of the belief that money plays a much more important role in what gets done in Washington than we believe. I personally believe that when campaigns spend the kind of money they’re now spending – this race I understand Ted Kennedy will spend about \$10 million to be reelected – he’s been in 32 years, \$10 million. I think that’s wrong because – and that’s not his own money, that’s all from other people. And to get that kind of money you’ve got to cozy up as an incumbent to all the special interest groups who can go out and raise money for you from their members. And that kind of relationship has an influence on the way you’re gonna vote.” (Mitt Romney, Remarks To Burlington Business Roundtable, Burlington, MA, 10/11/94)

-  **Romney:** “The kinds of demands that are being placed on the economics of running a campaign suggest an increasing power on the part of monied interests – and I think it’s wrong and we’ve got to change it.” (Mitt Romney, Remarks To Burlington Business Roundtable, Burlington, MA, 10/11/94)

 **Romney: “Associations Between Money And Politics ... Are Wrong.”** “Read the papers this morning – there’s an article in there about a contribution from Federal Express. Does that have any relationship to the campaign? I don’t know. I saw that the American Trial Lawyers Association and lawyers in general have contributed I think well over \$1 million to Ted Kennedy’s campaign. Well, does that have anything to do with the fact that he was unwilling to cut off a filibuster for product liability reform? Who knows. But these kinds of associations between money and politics in my view are wrong.” (Mitt Romney, Remarks To Burlington Business Roundtable, Burlington, MA, 10/11/94)

 **Romney Proposed Campaign Spending Limits “Because Otherwise I Think You Have Money Playing Far Too Important A Role.”** Romney: “And for that reason I would like to have campaign spending limits. And to say we’re not going to spend more than this in certain campaigns – in a campaign for Senate or US Representative and so forth. Because otherwise I think you have money playing far too important a role.” (Mitt Romney, Remarks To Burlington Business Roundtable, Burlington, MA, 10/11/94)

 **Romney: “I Also Would Abolish PACs ... I Don’t Like Them.”** “I also would abolish PACs. You probably have one – I don’t like them. I don’t like the influence of money – whether it’s business, labor or any other group. I do not like that kind of influence. Lobbyists, I want to register, know who they are. I want to make sure gifts are limited. I think we have to really become much more vigilant in seeing the impact on money – and I don’t care how it’s organized – on money on politics.” (Mitt Romney, Remarks To Burlington Business Roundtable, Burlington, MA, 10/11/94)

 **Romney: “I Think Contributions Are Fine, I Just Don’t Want Them To Be Larger And Larger.”** Romney: “I think contributions are fine, I just don’t want them to be larger and larger. Look, it’s \$10 million this year. My guess is that six years from now you know the race will be 15 and after that ... I mean, did you hear, California Congressman Huffington – \$25 million going into that race?” (Mitt Romney, Remarks To Burlington Business Roundtable, Burlington, MA, 10/11/94)

IMMIGRATION

Romney Has Been Criticized For Sending “Mixed Message” And Having “Seemingly Inconsistent” Positions

***Palm Beach Post:* Romney Offered “Mixed Message On Illegal Immigrants ... Saying He Supports Allowing Them To Apply To Become Permanent Residents But Opposes Current Legislation That Would Allow Them To Do Just That.”** “Mitt Romney offered a mixed message on illegal immigrants Thursday, saying he supports allowing them to apply to become permanent residents but opposes current legislation that would allow them to do just that. ... While Romney, the former governor of Massachusetts, said he would ‘not deny’ illegal immigrants the ‘opportunity to apply for permanent residency or citizenship,’ he would not say how he would change the proposed legislation to make such application acceptable.” (Brian Crowley, “Romney Skirts Solution To Immigration Issue,” *Palm Beach Post*, 5/25/07)

***St. Petersburg Times:* “Facing Scrutiny In Florida On Immigration, Republican Presidential Candidate Mitt Romney Shed Little Light On His Policy During Campaign Stops Thursday.”** (David DeCamp, “Romney Offers Little On Immigration,” *St. Petersburg Times*, 5/25/07)

- ***St. Petersburg Times:* Romney “Did Not Provide Many Details About How He Would Deal With Illegal Immigrants Already In The Country.”** “Romney, a former governor of Massachusetts, opposes the immigration bill in Congress supported by key Floridians, including Gov. Charlie Crist and Sen. Mel Martinez, both Republicans. The bill would give an estimated 12-million illegal immigrants a route to legal residency and citizenship. Romney, however, did not provide many details about how he would deal with illegal immigrants already in the country.” (David DeCamp, “Romney Offers Little On Immigration,” *St. Petersburg Times*, 5/25/07)

***Tampa Tribune:* Romney “Sent Vague And Seemingly Inconsistent Messages” On Immigration.** “As immigration reform continues to divide the candidates in the Republican presidential primary, Mitt Romney sent vague and seemingly inconsistent messages on the issue in a campaign swing through Florida Thursday. In a gathering of reporters before his appearance at a Polk County Republican Party fundraising dinner, Romney said he opposes the current reform package in the Senate, but wouldn’t say what it would take to fix it.” (William March, “Romney Vague On Immigration,” *Tampa Tribune’s “March On Politics” Blog*, 5/25/07)

- ***Tampa Tribune:* Romney “Didn’t Explain” How His Ideas On Immigration Would Avoid Giving Illegal Immigrants An Advantage In Applying For Residency.** “Romney said he would allow illegal immigrants ‘to apply for citizenship and permanent residency, but I would not give them an advantage relative to those who have already applied, relative to those who are staying in their home countries.’ But he didn’t explain how that application process would work so as to avoid giving illegal immigrants ‘an advantage.’” (William March, “Romney Vague On Immigration,” *Tampa Tribune’s “March On Politics” Blog*, 5/25/07)
- ***Tampa Tribune:* “In The Past, Romney Has Appeared To Support Allowing Illegal Immigrants To Apply For Citizenship Without Having To Leave The Country First.”** (William March, “Romney Vague On Immigration,” *Tampa Tribune’s “March On Politics” Blog*, 5/25/07)

***Miami Herald:* Romney’s Statements “Suggest He Actually Agrees With Major Tenets” Of Plan He Claims To Oppose.** “Republican presidential candidate Mitt Romney said he ‘strongly opposes’ an immigration plan also denounced by his party’s conservative wing, yet his public statements suggest he actually agrees with major tenets of the proposal in Congress.” (Beth Reinhard and Lesley Clark, “Romney’s Immigration Stance At Odds With State GOP Leaders,” *The Miami Herald*, 5/24/07)

Romney Repeatedly Called Immigration Deal “Amnesty” While In South Carolina, But Refused To Label It “Amnesty” During Appearance In Florida

In South Carolina, Romney Repeatedly Labeled The Immigration Deal As “Amnesty.” “The crowd at South Carolina’s Republican convention ... cheered as presidential candidate Romney told them: ‘One simple rule: No amnesty.’ During his speech and before his remarks, Romney said a proposed new visa for immigrants amounts

to amnesty if it can be renewed indefinitely. 'If that's not a form of amnesty, I don't know what is,' Romney said." (Jim Davenport, "S.C. Republicans Cheer Romney As He Attacks Immigration Bill," *The Associated Press*, 5/19/07)

 **Romney In South Carolina:** "I think we should not call it the 'Z visa,' we should call it the 'A visa' because it's amnesty and that's what it stands for." (Jim Davenport, "S.C. Republicans Cheer Romney As He Attacks Immigration Bill," *The Associated Press*, 5/19/07)

- [Watch](#) Romney Speak To South Carolina Audience On Immigration

But In Florida, Romney "Refused to Use The Word 'Amnesty'" To Describe Immigration Deal. "Although he refused to use the word 'amnesty,' as other opponents of the current immigration bill have, Romney said he doesn't mind if illegal immigrants apply for legal work visas, but not before those who have obeyed the law by staying in their own country to apply have done so first." (Bill Rufty, "Romney Speaks To County Republicans At Dinner," *Lakeland Ledger*, 5/25/07)

 **Romney In Florida:** "There are some who get involved in whether it is technically amnesty or not, and I'm not really trying to define what is technically amnesty, I'll let the lawyers do that." (Mitt Romney, Interview With *The [Lakeland, FL] Ledger*, www.theledger.com, Accessed 5/25/07)

- [Watch](#) Romney Speak To Florida Reporters On Immigration

But In November 2005, Romney Said McCain-Kennedy Immigration Reform Was "Quite Different Than" Amnesty, Called Bill "Reasonable"

In November 2005, Romney Spoke "Approvingly Of Efforts By McCain And Bush To Solve The Nation's Immigration Crisis," Saying McCain-Kennedy Was "Quite Different" From Amnesty, Called Proposal "Reasonable." "In a November 2005 interview with the *Globe*, Romney described immigration proposals by McCain and others as 'quite different' from amnesty, because they required illegal immigrants to register with the government, work for years, pay taxes, not take public benefits, and pay a fine before applying for citizenship. 'That's very different than amnesty, where you literally say, "OK, everybody here gets to stay,"' Romney said in the interview. 'It's saying you could work your way into becoming a legal resident of the country by working here without taking benefits and then applying and then paying a fine.' Romney did not specifically endorse McCain's bill, saying he had not yet formulated a full position on immigration. But he did speak approvingly of efforts by McCain and Bush to solve the nation's immigration crisis, calling them 'reasonable proposals.' Romney also said in the interview that it was not 'practical or economic for the country' to deport the estimated 12 million immigrants living in the US illegally. 'These people contribute in many cases to our economy and to our society,' he said. 'In some cases, they do not. But that's a whole group we're going to have to determine how to deal with.'" (Scott Helman, "Romney's Words Grow Hard On Immigration," *The Boston Globe*, 3/16/07)

- **Romney In November 2005:** "I think an amnesty program is what – which is all the illegal immigrants who are here are now citizens, and walk up and get your citizenship. What the president has proposed, and what Senator McCain and Cornyn have proposed, are quite different than that. They require people signing up for a – well, registering and receiving a, if you will, a number – a registration number. Then working here for six years and paying taxes – not taking benefits. Health, Medicaid, food stamps and so forth, not taking benefits. And then at the end of that period, registering to become a citizen, or applying to become a citizen and paying a fee. And those are things that are being considered. And I think that that's – that those are reasonable proposals." (Linked Audio: www.boston.com, Scott Helman, "Romney's Words Grow Hard On Immigration," *The Boston Globe*, 3/16/07)
- [Listen](#) To Romney Speak On Immigration In 2005.

Today, Romney Says He Opposes Immigration Reform Compromise Because It Creates "Special Pathway To Citizenship"

 **Romney Says He Opposes Any "Special Pathway To Citizenship."** "[I] think I'm best off to describe my own positions. And my positions, I think I've just described for you – secure the border, employment verification and no special pathway to citizenship. I feel that's the course we ought to take." (CNN's "The Situation Room," 5/22/07)

Romney Campaign Says Romney Opposes "Special Pathway To Citizenship." "In fact, [Romney aide Kevin] Madden concedes, there are parts of the compromise bill that Romney supports. Their particular problem is that

the measure – and particularly the ‘Z visa’ – presents a ‘special pathway to citizenship,’ Madden says.” (Jonathan Martin, “The McCain-Romney Battle Comes Out Of The Shadows,” *Politico.com*, 5/24/07)

But In March 2006, Romney Supported “Path Toward Citizenship” For Illegal Immigrants, Said Republicans Who Broke Ranks With President Bush “Made A Big Mistake”

“Gov. Mitt Romney Expressed Support ... For An Immigration Program That Places Large Numbers Of Illegal Residents On The Path Toward Citizenship ... Romney Said Illegal Immigrants Should Have A Chance To Obtain Citizenship.” (Evan Lehmann, “Romney Supports Immigration Program, But Not Granting ‘Amnesty’,” *The Lowell Sun*, 3/30/06)

- **Romney:** “I don’t believe in rounding up 11 million people and forcing them at gunpoint from our country ... With these 11 million people, let’s have them registered, know who they are. Those who’ve been arrested or convicted of crimes shouldn’t be here; those that are here paying taxes and not taking government benefits should begin a process towards application for citizenship, as they would from their home country.” (Evan Lehmann, “Romney Supports Immigration Program, But Not Granting ‘Amnesty’,” *The Lowell Sun*, 3/30/06)

“[M]assachusetts Gov. Mitt Romney, Has Made It Known That He Supports The President’s Immigration Position, Saying That Republicans Who Have Broken Rank With Bush ‘Made A Big Mistake.’” (Liz Sidoti, “McCain May Alienate Some Conservatives,” *The Associated Press*, 9/20/06)

Romney Refuses To Say What He Would Do With Illegal Immigrants In Country Today

Romney “Did Not Provide Many Details About How He Would Deal With Illegal Immigrants Already In The Country.” “Romney, a former governor of Massachusetts, opposes the immigration bill in Congress supported by key Floridians, including Gov. Charlie Crist and Sen. Mel Martinez, both Republicans. The bill would give an estimated 12-million illegal immigrants a route to legal residency and citizenship. Romney, however, did not provide many details about how he would deal with illegal immigrants already in the country.” (David DeCamp, “Romney Offers Little On Immigration,” *St. Petersburg Times*, 5/25/07)

***The Politico*: “Romney Continues To Punt On What To Do With The 12 Million Illegal Immigrants In The Country.”** (Jonathan Martin, “The ‘A’ Word,” *The Politico*, 5/25/07)

Now And In Recent Past, Romney Says We Shouldn’t “Round Up” And Deport Illegal Immigrants

Romney In May 2007: “I Don’t Think That We’re Going To Round Up 11 Or 12 Or However Many Million People And Bus Them Out Of The Country. That’s Not What I’m Talking About.” “I don’t think that we’re going to round up 11 or 12 or however many million people and bus them out of the country. That’s not what I’m talking about ... Those who committed felonies, of course, would be deported. Those who require government assistance to stay here would surely need to get off government assistance and ultimately could not remain here on government assistance.” (Brendan Farrington, “Romney Says His Opposition To Same-Sex Marriage Isn’t Intolerance,” *The Associated Press*, 5/24/07)

- **Romney Aide Said He Wouldn’t Necessarily Favor Deporting All Illegal Immigrants, Claiming “That’s Something We’re Willing To Work On.”** “So would Romney suggest deporting the 12 million illegal immigrants now in the country? Not necessarily. ‘That’s something that we’re willing to work on,’ says [Romney aide Kevin] Madden.” (Jonathan Martin, “The McCain-Romney Battle Comes Out Of The Shadows,” *Politico.com*, 5/24/07)

Romney In March 2007: “I don’t believe we’re going to round up the 12 or 20 million people and deport them. ... [Romney said he is] not in favor of widespread roundups ...” (Carla Marinucci, “Romney Says Illegal Immigrants Should Register,” *San Francisco Chronicle*, 3/16/07)

Romney In March 2006: “I don’t believe in rounding up 11 million people and forcing them at gunpoint from our country ...” (Evan Lehmann, “Romney Supports Immigration Program, But Not Granting ‘Amnesty’,” *The Lowell Sun*, 3/30/06)

Romney In March 2006: “The 11 million or so [illegal immigrants] that are here are not going to be rounded up and box-carted out of America.” (Heidi Przybyla, “Romney Shifts On Immigration, Sharpening Contrast With McCain,” *Bloomberg*, 3/29/07)

In Florida Romney Said “He Supports Allowing [Illegal Immigrants] To Apply To Become Permanent Residents But Opposes Current Legislation That Would Allow Them To Do Just That”

In Florida, Romney Offered “Mixed Message On Illegal Immigrants ... Saying He Supports Allowing Them To Apply To Become Permanent Residents But Opposes Current Legislation That Would Allow Them To Do Just That.” “Mitt Romney offered a mixed message on illegal immigrants Thursday, saying he supports allowing them to apply to become permanent residents but opposes current legislation that would allow them to do just that. ... While Romney, the former governor of Massachusetts, said he would ‘not deny’ illegal immigrants the ‘opportunity to apply for permanent residency or citizenship,’ he would not say how he would change the proposed legislation to make such application acceptable.” (Brian Crowley, “Romney Skirts Solution To Immigration Issue,” *Palm Beach Post*, 5/25/07)

Romney Refused To Say “How He Would Deal With Illegal Immigrants Already In The Country.” “Romney, a former governor of Massachusetts, opposes the immigration bill in Congress supported by key Floridians, including Gov. Charlie Crist and Sen. Mel Martinez, both Republicans. The bill would give an estimated 12-million illegal immigrants a route to legal residency and citizenship. Romney, however, did not provide many details about how he would deal with illegal immigrants already in the country.” (David DeCamp, “Romney Offers Little On Immigration,” *St. Petersburg Times*, 5/25/07)

-  **Romney In Florida:** “You know I haven’t laid out the specific provisions of where they apply, do they go home, do they stay, are they allowed to stay for some period of time. There’s a lot of negotiation and give and take on issues of that nature. For me the central issue is that people who are here illegally should be able to – should not be prohibited – should be able to apply for permanent residency or citizenship, that should not be prohibited, but that they should not receive any special advantage in being granted those status relative to people who have applied legally. So that’s for me the touchstone principle and then we can talk about ‘should they go home, should they stay, do they pay a fine, can they stay here temporarily.’ These are all issues that can be worked out in negotiated legislative process, but for me the central issue is as I’ve described.” (Mitt Romney, Interview With *The [Lakeland, FL] Ledger*, www.theledger.com, Accessed 5/25/07)

But At Recent South Carolina Debate, Romney Said He Would Tell Illegal Immigrants To “Go Home”

 **Romney: “I Am Going To Tell Them To Go Home.”** ROMNEY: “My view is this: people should have no advantage by having come here illegally.” FOX NEWS’ CHRIS WALLACE: “But you are not telling them to go home, sir.” ROMNEY: “I am going to tell them to go home. They can begin the process of applying for citizenship or applying for permanent residency.” (Fox News Republican Presidential Debate, Columbia, SC, 5/15/07)

Romney Claims “All” Illegal Immigrants “Would All Be Qualified” To Stay In U.S. “For The Rest Of Their Lives,” But Actual Senate Proposal Does Not Support His Assertion

May 29, 2007: Romney Claims “All Those That Are Here Illegally Today Would All Be Qualified” To Receive “Z” Visa And “Stay Here For The Rest Of Their Lives.” ROMNEY: “[T]he Senate bill which is currently being considered in Washington says that all those that are here illegally today would all be qualified to get what is known as a ‘Z’ Visa and to stay here for the rest of their lives under this visa. That in my view, while it may or may not be technically amnesty, is an amnesty-like provision that I don’t support.” (Mitt Romney, Remarks In Dover, NH, 5/29/07)

- **“Z” Visa Requires Applicants To Admit Breaking Law, Pay Fine, Pass Criminal Background Check, Remain Employed And Maintain Clean Record.** “In order to obtain a Z visa granting temporary legal status, workers in the country before January 1, 2007, must acknowledge that they broke the law, pay a \$1,000 fine, pass criminal background checks, remain employed, and maintain a clean record.” (The White House, “Fact Sheet: Border Security And Immigration Reform Agreement Overcomes 1986 Mistakes,” White House Website, www.whitehouse.gov, 5/22/07)
- **Wide Range Of Crimes Extending “Into The Thousands” Disqualifies Potential Applicants From Being Granted “Z” Visa.** “The range of crimes that disqualify applicants from the Z visa program extends into the thousands and includes: Any felony; Any three or more misdemeanors; Any serious criminal offense; Crimes involving moral turpitude (with narrow exceptions for certain misdemeanors such as those committed before age 18); Violations of a law relating to a controlled substance.” (The White House, “Immigration Fact Check: Responding To Key Myths,” White House Website, www.whitehouse.gov, 5/25/07)

Top Romney Advisor Recently Said Romney Would Put Forward “An Immigration Proposal,” But Romney Refuses To Offer Any Proposals Or Solutions As He Criticizes Senate Compromise

Former Florida GOP Chairman Al Cardenas, A Key Romney Adviser, Said “I Am Confident That He Will [Put] Forward An Immigration Proposal That Floridians And Hispanics Alike Will Find Fair.” “Romney advisor Al Cardenas, a Cuban-American lawyer and former chairman of the Republican Party of Florida, said: ‘The criticism he has received has been over the top and unfair. ... I am confident that he will [put] forward an immigration proposal that Floridians and Hispanics alike will find fair.’” (Beth Reinhard and Lesley Clark, “Romney’s Immigration Stance At Odds With State GOP Leaders,” *The Miami Herald*, 5/24/07)

In Florida, Romney Declined To Say “How He Would Specifically Change” The Immigration Deal, Saying “I’m Not A Legislator.” “Asked at a news conference in Lakeland how he would specifically change the language, Romney said, ‘I’m not, here, going to describe language of a piece of legislation. I’m not a legislator, at least not currently, so I’m not going to give you legislative language.’” (Brian Crowley, “Romney Skirts Solution To Immigration Issue,” *Palm Beach Post*, 5/25/07)

The Hotline Reported That “No Specific Proposals Are Forthcoming” From Romney On Immigration. “By the way: if you’re wondering precisely what Mitt Romney ... would actually do with the 11-12m illegal immigrants already here, well, you’ll have to wait a while. No specific proposals are forthcoming, we are told.” (“McCain Is A Lone Wolf On Immigration,” The Hotline’s “On Call” [Blog](#), 5/23/07)

ROMNEY AT ODDS WITH LEADING FLORIDA REPUBLICANS ON IMMIGRATION

Romney Is At Odds With Top Florida Republicans Over Immigration As He Places Heavy Emphasis On State In Quest For Nomination

ABC News: “[R]omney’s Position On Immigration Could Cost Him Crucial Political Support In Florida” Because His Position Is At Odds With Florida Republican Leaders, Including Former Gov. Jeb Bush, Gov. Charlie Crist And Sen. Mel Martinez. “But with Romney seeking to distance himself from his rivals by opposing the Senate immigration bill, Romney’s relationship with Jeb Bush could suffer. The former Florida governor has voiced strong support for the type of immigration reform that’s now before the Senate, viewing it as an important priority of his brother’s – and the right type of approach to a complicated issue. ... [R]omney’s position on immigration could cost him crucial political support in Florida, which, with the state’s move to hold its primary Jan. 29, is poised to play an outsize role in the presidential nominating process. Aside from the former governor, the Senate bill is being supported by current Florida Gov. Charlie Crist, a Republican, and Senator Mel Martinez, a Cuban immigrant who is chairman of the Republican National Committee and has been intricately involved in crafting the immigration bill. Martinez said on CNN Sunday that the immigration bill ‘could be the saving of the Republican Party, frankly.’” (Rick Klein, “In Key State, Romney’s Relationship With Gov. Jeb Bush Strained,” *ABC News*, 5/22/07)

Romney Immigration Stance “Is At Odds” With Prominent Florida Republicans Like Sen. Mel Martinez, Gov. Charlie Crist And Former Gov. Jeb Bush. “[Romney’s] immigration stance is at odds with some of the state’s most prominent Republicans, including Sen. Mel Martinez, who helped craft the legislation, and Gov. Charlie Crist, who supports allowing illegal immigrants to earn citizenship. Former Gov. Jeb Bush – whom Romney has name-dropped as a potential running mate – has told friends he is ‘disappointed’ with Romney’s position.” (Beth Reinhard and Lesley Clark, “Romney’s Immigration Stance At Odds With State GOP Leaders,” *The Miami Herald*, 5/24/07)

Romney Campaign Sees Florida Primary As Crucial To Hopes Of Winning Nomination. “Republican presidential candidate Mitt Romney has all along bet on an early Florida primary and continued his push for support here Monday ... He left no doubt that the talk of moving up the Florida primary is part of his overall strategy in winning the presidency.” (Brendan Farrington, “Romney Betting On Early Florida Primary,” *The Associated Press*, 4/24/07)

Romney: “I Want To Be In Florida As Often As I Can Be.” “There’s no question that the focus on Florida is importantly the result of having an early primary ... Florida is going to have a big say in who is going to be the nominee in each of the parties so I want to be in Florida as often as I can be.” (Brendan Farrington, “Romney Betting On Early Florida Primary,” *The Associated Press*, 4/24/07)

Former Governor Jeb Bush Reportedly “Disappointed” In Romney’s Position On Immigration, As Other State Republican Leaders Voice Support For Compromise

Former Governor Jeb Bush Reportedly “Disappointed” That Romney Has Attacked The Immigration Compromise And Begun Running Ads Against The Bill. “[A]na Navarro, a Florida Republican activist and fundraiser who has worked with Jeb Bush on immigration issues in the past, said the former governor told her last weekend that he is ‘disappointed’ that Romney has denounced the immigration bill in television advertisements.

'It's one of the biggest policy and legacy issues of his brother's administration, but more than that, Jeb believes in this,' said Navarro, who is supporting Sen. John McCain, R-Ariz., for president. 'I don't speak for Jeb, but I know where his heart is on this issue.'" (Rick Klein, "In Key State, Romney's Relationship With Gov. Jeb Bush Strained," *ABC News*, 5/22/07)

- **In April 2007, Former Gov. Jeb Bush Criticized Politicians For "Pounding Their Chests," Creating "The Perception That All Immigrants Are Bad," In A Way Which Is "Hurtful" To His Hispanic Wife.** "Accusing politicians of 'pounding their chests' on immigration for short-term political gain, Florida Gov. Jeb Bush said Tuesday that the tone of the debate had been 'hurtful' to him and his Mexican-born wife, Columba. Bush, the younger brother of President Bush, reserved some of his sharpest criticism for conservatives in his own Republican Party, calling it 'just plain wrong' to charge illegal immigrants with a felony, as a provision passed by the Republican-led House would do. He also opposed 'penalizing the children of illegal immigrants' by denying them U.S. citizenship, an idea backed by some conservatives but not included in the legislation. 'My wife came here legally, but it hurts her just as it hurts me when people give the preception that all immigrants are bad,' the Florida governor wrote in an e-mail exchange with *The Times*." (Peter Wallsten, "Florida Gov. Bush Calls Tone Of Immigration Debate 'Hurtful,'" *The Los Angeles Times*, 4/5/07)

Gov. Charlie Crist (R-FL) On Immigration Deal: "I'm Encouraged By It." "In Florida, McCain is most in line with the Republican leadership. 'I'm encouraged by it. I think it's the concept that Sen. Martinez likes,' Gov. Charlie Crist said of the immigration bill, and referring to Florida Sen. Mel Martinez, who is also general chairman of the Republican National Committee." (Adam C. Smith, "Immigration Criticism Becomes Vague In Florida," *St. Petersburg Times*, 5/27/07)

State GOP Chairman Jim Greer: Framework Is "Realistic But Also Imposes The Rule Of Law ... Quite Often People Don't Understand The Entire Issue And Are Unrealistic When They Want To Simply Send Everyone Back." "State Republican Party chairman Jim Greer also spoke up for the immigration plan in a Political Connections interview airing today on Bay News 9. 'I think the Republican leadership, working with Democrats in Congress, have found a middle ground that is realistic but also imposes the rule of law through sanctions and other things,' Greer said. 'I think quite often people don't understand the entire issue and are unrealistic when they want to simply send everyone back.'" (Adam C. Smith, "Immigration Criticism Becomes Vague In Florida," *St. Petersburg Times*, 5/27/07)

Former Florida GOP Chairman Al Cardenas, A Key Romney Adviser: "I am confident that [Romney] will [put] forward an immigration proposal that Floridians and Hispanics alike will find fair." (Beth Reinhard and Lesley Clark, "Romney's Immigration Stance At Odds With State GOP Leaders," *The Miami Herald*, 5/24/07)

Romney's "Public Statements Suggest He Actually Agrees With Major Tenets Of The [Immigration] Proposal In Congress." "Republican presidential candidate Mitt Romney said he 'strongly opposes' an immigration plan also denounced by his party's conservative wing, yet his public statements suggest he actually agrees with major tenets of the proposal in Congress. The record shows Romney has repeatedly demanded stronger border security. A campaign ad calls for tamper-proof identification cards. And in a debate last week, he said illegal immigrants need to go back to their home country and "get in line" before they can become citizens. 'That's exactly what's on the table. All of those things are part of the immigration package,' said Marshall Fitz, spokesman for the American Immigration Lawyers Association, a nonpartisan organization of lawyers and professors." (Beth Reinhard and Lesley Clark, "Romney's Immigration Stance At Odds With State GOP Leaders," *The Miami Herald*, 5/24/07)

- **Marshall Fitz, Spokesman For The American Immigration Lawyers Association:** "Romney and the other candidates who continue to beat their chests against this legislation are just playing to the conservative base." (Beth Reinhard and Lesley Clark, "Romney's Immigration Stance At Odds With State GOP Leaders," *The Miami Herald*, 5/24/07)

Hispanic Leaders: Romney's Attempts To "Reinvent" His Position Will "Hurt His Chances" In Florida

Sergio Massa, President Of The Latin-American Voters League: "As Mitt Romney tours our diverse and great State of Florida he should know better that his efforts to reinvent his position on immigration reform will definitely hurt his chances of reaching out to a significant voter-block in our state." (Hispanic Leaders, Press Release, 5/23/07)

Nora Sandigo, Director Of The Latin-American Voters League: "The Hispanic community in Florida puts a great deal of emphasis on values, and transforming on a position as crucial to voters as immigration is not a value that is likely to attract much support. Whether it has been the successful elections of Governor Jeb Bush, Governor Charlie Crist or President George W. Bush our State has consistently proven that we support leaders

who will approach this issue in a creative, reasonable, realistic and compassionate manner and Mitt Romney's position is unfortunately inconsistent." (Hispanic Leaders, Press Release, 5/23/07)

Jose Lagos, Vice President Of The Latin-American Voters League: "His interest in putting politics over a real immigration solution, and his willingness to change positions in just the span of a year largely discounts his candidacy in a number of important Florida Republican circles and also at large. ... We call upon Governor Romney to reconsider his position and with all due respect to prove his leadership by working now not after the election in a bi-partisan manner the approval in Senate and Congress of a Comprehensive Immigration Reform which is not an amnesty." (Hispanic Leaders, Press Release, 5/23/07)

Media Reaction: What They're Saying About Romney's Immigration Stance

New York Sun's Ryan Sager: "Is Mitt Romney Hurting Himself With Jeb Bush (Not To Mention George W.) By Opposing The Immigration Compromise? The Quick And Dirty Answer Would Have To Be Yes." "Soren Dayton asks an interesting question: Is Mitt Romney hurting himself with Jeb Bush (not to mention George W.) by opposing the immigration compromise? The quick and dirty answer would have to be yes. Jeb Bush is quite outspoken on immigration – earlier this year at the National Review Institute's conference in Washington, D.C., he was emphatic about the good immigrants do and the fact that they are a net social good, not a cost. There had been theories that Mr. Romney was the tacit favorite of the Bushes – at least of Jeb's, as some of his staff went with Mitt. This seems likely to change that picture. Though, it's not as if Mr. Romney is likely to take Florida from Rudy Giuliani, anyway." (Ryan Sager, "Romney: Hurting Himself In Florida?" *New York Sun's Politics Blog*, www.latestpolitics.com, 5/22/07)

Townhall's Matt Lewis Cites ABC News Piece On Romney's Immigration Stance Hurting Him In Florida, Noting That Los Angeles Times Quoted Jeb Bush As Saying Tone Of Immigration Debate Was "Hurtful" To He And His Wife, Columba. "This ABC News piece speculates that Romney's immigration position might be straining his relationship with Jeb Bush: 'Jeb Bush did not respond to a request for comment. But Ana Navarro, a Florida Republican activist and fundraiser who has worked with Jeb Bush on immigration issues in the past, said the former governor told her last weekend that he is 'disappointed' that Romney has denounced the immigration bill in television advertisements. 'It's one of the biggest policy and legacy issues of his brother's administration, but more than that, Jeb believes in this,' said Navarro, who is supporting Sen. John McCain, R-Ariz., for president. 'I don't speak for Jeb, but I know where his heart is on this issue.' Yesterday, Peter Wallsten quoted Jeb Bush as saying, 'the tone of the debate had been 'hurtful' to him and his Mexican-born wife, Columba.'" (Matt Lewis' Townhall Blog, "Romney And Jeb," www.townhall.com, 5/22/07)

Eye On '08 Blog: "ABC just wrote about the damage that Mitt Romney's pandering on immigration will do to him in Florida. It even quotes Jeb Bush as 'disappointed' in Romney." (Eye On '08 Blog, "Does Florida's Advance Foreground Immigration?" www.eyeon08.com, 5/22/07)

 **NPR's Mara Liasson: Romney "Has Yet To Develop A Kind Of Intellectually Coherent Position On The Immigration Bill," Adding "Now That It's Gotten More Draconian, He's Decided It's Amnesty."** "I do think that [Romney] has yet to develop a kind of intellectually coherent position on the immigration bill, something that he supported a more lenient version of last time it was up – now that it's gotten more draconian, he's decided it's amnesty. But last night he said for instance that the answer to the problem of the 12 million illegals in the country is to merely enforce the current law. The fact that it's not being enforced – or can't be – is why we have this new legislation in the Senate now." (Fox News' "Special Report," 6/6/07)

 **Roll Call's Mort Kondracke: "The Whole Idea That Romney Is Now Gonna Basically Try To Force Out 12 Million People Is Simply Ridiculous."** (Fox News' "Special Report," 6/6/07)

ROMNEY "APPEARED TO MISCHARACTERIZE" FORMER GOV. JEB BUSH'S IMMIGRATION POLICIES

Romney "Appeared To Mischaracterize" Former Gov. Jeb Bush's Immigration Policies

 **Romney: "I Deputized, As Did Governor Bush Here, My State Police To Be Able To Enforce Immigration Laws."** (Mitt Romney, Interview With *The [Lakeland, FL] Ledger*, www.theledger.com, Accessed 5/25/07)

St. Petersburg Times: Romney "Appeared To Mischaracterize Bush's Position," As Bush Approved Small Pilot Program Focused On Terrorism. "[I]n Polk County last week, Romney sought to invoke Bush on immigration – and appeared to mischaracterize Bush's position. 'I deputized, as did Gov. Bush here, my state

police to be able to enforce immigration laws,' Romney said in an interview with the *Lakeland Ledger*. But Bush approved a small pilot program in 2002, which the governor stressed was limited to a few officers and intended to focus on suspected terrorists, not all illegal immigrants." (Adam C. Smith, "Immigration Criticism Becomes Vague In Florida," *St. Petersburg Times*, 5/27/07)

Program Agreed To By Former Gov. Bush In 2002 Was Limited Strictly To Terrorism Investigations By Florida's Domestic Security Task Force. "The state and federal governments are about to sign an agreement that will give 35 members of Florida's Domestic Security Task Force power to enforce immigration laws during terrorism investigations. The agreement will solve, at least for a year, frustrations the Florida Department of Law Enforcement has expressed about not having the ability to detain a suspected terrorist for violating immigration laws." (Brendan Farrington, "State Officers Will Have INS Powers In Terrorism Investigations," *The Associated Press*, 6/6/02)

- **Bush: "I Would Have A Lot Of Trepidation If ... Our Duties End Up With Local Law Enforcement Becoming The Immigration Cops Of The Country."** "Gov. Jeb Bush ... said he is comfortable with the program because it is limited to just a few officers already assigned to domestic security. 'I would have a lot of trepidation if ... every police officer was going to be a sworn INS officer and our duties end up with local law enforcement becoming the immigration cops of the country,' Bush said. 'That would give me a lot of trouble.'" (Brendan Farrington, "State Officers Will Have INS Powers In Terrorism Investigations," *The Associated Press*, 6/6/02)

Former Florida Department Of Law Enforcement Commissioner Tim Moore: "It's Targeted Only To Terrorist Investigations – Not Checking Green Cards And Work Camps." MOORE: "It's targeted only to terrorist investigations – not checking green cards and work camps ... We don't want there to be any misunderstanding about this. We are not attempting in any way of assuming the responsibilities of INS - that's not our job, that's not our responsibility and we're not equipped to do it." (Brendan Farrington, "State Officers Will Have INS Powers In Terrorism Investigations," *The Associated Press*, 6/6/02)

ROMNEY ON IMMIGRATION IN MASSACHUSETTS

Romney Employed Illegal Immigrants For Landscaping Duties On His Personal Property

For More Than A Decade, Romney Used Services Of Company Heavily Reliant On Illegal Immigrant Labor To Perform Landscaping Duties At His Home. "As Governor Mitt Romney explores a presidential bid, he has grown outspoken in his criticism of illegal immigration. But, for a decade, the governor has used a landscaping company that relies heavily on workers like these, illegal Guatemalan immigrants, to maintain the grounds surrounding his pink Colonial house on Marsh Street in Belmont. ... Romney never inquired about their status, they said. In addition to maintaining the governor's property, they also tended to the lawn at the house owned by Romney's son, Taggart, less than a mile away on the same winding street." (Jonathan Saltzman et al, "Illegal Immigrants Toiled For Governor," *The Boston Globe*, 12/1/06)

Romney Reportedly "Never Inquired About" Legal Status Of Workers On His Property, But Occasionally Greeted Them By Calling Out "Buenos Dias." "The Globe recently interviewed four current and former employees of Community Lawn Service with a Heart, the tiny Chelsea-based company that provides upkeep of Romney's property. All but one said they were in the United States illegally. ... The workers said they were paid in cash at \$9 to \$10 an hour and sometimes worked 11-hour days. Romney never inquired about their status, they said. ... The workers who had landscaped Romney's property seemed unaware of the governor's support for stricter controls on illegal immigration. Several described casual encounters with Romney over the years and said he had never expressed any curiosity about their status. Rosales recalled Romney sometimes waving as they tended to the grounds, which include a tennis court and swimming pool. Romney occasionally called out, 'buenos dias,' drawing good-natured laughter from the workers. Ann Romney was friendly, Rosales said, and he said she brought them water on one particularly hot day." (Jonathan Saltzman et al, "Illegal Immigrants Toiled For Governor," *The Boston Globe*, 12/1/06)

"Asked By A Reporter Yesterday About His Use Of Community Lawn Service With A Heart, Romney ... Said, 'Aw, Geez,' And Walked Away." (Jonathan Saltzman et al, "Illegal Immigrants Toiled For Governor," *The Boston Globe*, 12/1/06)

While Romney Was Governor, State Awarded Contract To New Bedford, MA Firm Raided In 2007 For Massive Immigration Law Violations

Michael Bianco Inc. Was Awarded State Contract Worth \$66,250 In Early 2003. "The New Bedford manufacturer raided by federal agents last month for allegedly employing illegal immigrants won approval for

\$111,150 in state grants over the last four years to hire and train employees, as part of the company's expansion. ... In early 2003, Michael Bianco, which then employed 87 people, was awarded a \$66,250 grant to hire and train 80 new stitchers and machine operators, and to develop an in-house training program for entry-level workers." (Scott Helman, "State OK'd Grants To Firm," *The Boston Globe*, 4/9/07)

- **Romney Administration Also Approved Special Tax Break That Saved Michael Bianco Over \$50,000.** "According to New Bedford officials, the company also received a five-year tax break from the city in 2004 that had already reaped Michael Bianco more than \$50,000 in tax savings as of last month. That tax break, which was approved by the state, required that approximately half of the new jobs generated by the company be given to city residents, in exchange for a total of \$80,000 in savings by 2010." (Scott Helman, "State OK'd Grants To Firm," *The Boston Globe*, 4/9/07)

In March 2007, Federal Authorities Raided Michael Bianco's Headquarters And Arrested Hundreds Of Illegal Immigrants. "The owner and three managers of a New Bedford leather manufacturer that's won more than \$91 million in U.S. military contracts were arrested Tuesday for allegedly hiring illegal immigrants. The company, Michael Bianco Inc., hired illegal aliens as it tried to meet deadlines to supply backpacks and other products to the military, federal officials said in a court filing. Immigration and Customs Enforcement officers raided the company Tuesday morning." (Jay Lindsay, "Co. Raided, Accused Of Hiring Illegals," *The Associated Press*, 3/6/07)

- **As Many As 350 Michael Bianco Workers Were In The U.S. Illegally.** "The 'deplorable' New Bedford sweatshop shuttered by the feds yesterday squeezed illegal aliens for every second of their workday, fining them \$20 for spending more than two minutes in the bathroom and firing them for talking twice while on the clock. ... As many as 350 of the company's 500 workers – including single mothers and husbands and wives – are now facing deportation." (Laurel Sweet, "Feds Nab Five In Sweatshop Raid," *Boston Herald*, 3/7/07)
- **"Federal Prosecutors Allege The Company Deliberately Recruited Illegal Immigrants Instead Of Legal Workers, Believing They Were Desperate Enough For Jobs That They Would Tolerate Substandard Working Conditions."** (Scott Helman, "State OK'd Grants To Firm," *The Boston Globe*, 4/9/07)
- **Top Michael Bianco Officials Allegedly Helped Illegal Workers Procure False Social Security Cards.** "In an affidavit, investigators claimed that owner Francesco Insolia, plant manager Dilia Costa, payroll manager Ana Figueroa and office manager Gloria Melo allowed an undercover officer who told them she was an illegal immigrant to continue working at the plant, and Figueroa advised her how to obtain a fake Social Security card." (Jay Lindsay, "Co. Raided, Accused Of Hiring Illegals," *The Associated Press*, 3/6/07)

Romney's Successor – Not Romney – Signed Order Requiring State Contractors To Verify Employees' Immigration Status. "At the time both grants were approved, the state did not require employers to verify workers' immigration status, Walsh said. Now, under an executive order signed by Governor Deval Patrick in February, the state will require all such grant recipients to certify that their employees can legally work in the United States, she said." (Scott Helman, "State OK'd Grants To Firm," *The Boston Globe*, 4/9/07)

Romney Aide Says Grant Money Awarded By Romney Administration To Michael Bianco Should Be "Refunded" To Taxpayers. "A spokesman for Mitt Romney, the former governor whose administration awarded the 2003 grant, said Patrick should seek to get the money back if it was used to train illegal workers. 'Mitt Romney's view is if that grant was not used for legitimate purposes -- if it was used to train illegal aliens, for instance -- then that money should be refunded to the taxpayers of Massachusetts,' said spokesman, Eric Fehrstrom." (Scott Helman, "State OK'd Grants To Firm," *The Boston Globe*, 4/9/07)

Michael Bianco Spokesman Alleges State Official Helped Company Write Its Own Grant. "A spokesman for Michael Bianco, Doug Bailey, said Insolia didn't even know such state assistance was available until New Bedford officials informed him during a visit to the factory. The state eventually sent a representative to meet with Insolia and helped him write the grant, Bailey said. Questions about workers' immigration status never came up, he said." (Scott Helman, "State OK'd Grants To Firm," *The Boston Globe*, 4/9/07)

HEALTH CARE

PRESCRIPTION DRUGS AND GENERAL ISSUES

Romney Flip-Flopped On Importing Cheaper Prescription Drugs From Other Countries, Now Opposes It

Romney Aide In 2003: Romney “Not Opposed To Legalizing Drug Importation.” “The governor is not opposed to legalizing drug importation, but this is a short-term solution because drug companies are already acting to limit their sales to Canada in an effort to curb re-importation. Gov. Romney is committed to devising a comprehensive, long-term strategy to bring down the high cost of prescription drugs and will work with all interested parties, including members of our legislature, on this important issue.” (Jacqueline Reis and Danielle Williamson, “Statewide Tour Touts Importing Drugs,” *Telegram & Gazette* [Worcester, MA] 10/22/03)

Romney In 2004: Importation “Not The Solution To America’s Problem.” “Importing drugs from other countries could leave U.S. citizens vulnerable to unsafe medicines and hurt the development of a vital Massachusetts industry, Gov. Mitt Romney said yesterday to biotechnology executives. ‘I believe that drug importation is not the solution to America’s problems,’ Mr. Romney said at the annual meeting of the Massachusetts Biotechnology Council at the Sheraton Boston hotel.” (Lisa Eckelbecker, “Leaders Deride Drug Imports,” *Telegram & Gazette* [Worcester, MA], 4/30/04)

Romney Criticized 2003 Medicare Prescription Drug Benefit

“Romney ... Joined Some Of His Fellow Republicans In Chastising The Bush Administration On ... The Medicare Prescription Drug Benefit.” (Susan Milligan, “Romney Faults Bush On War, Medicare, And Ports Pact,” *The Boston Globe*, 2/27/06)

Romney Criticized “Outrageous Rate” Of Growth Of Drug Costs. “I’d like to see a holistic program that says, ‘OK, what are we going to do for people who are retiring in Medicare and those that are poor on Medicaid, how do we make sure that this doesn’t become an overwhelming burden?’ Let’s include prescription drugs but keep it from growing at such an outrageous rate.” (Fox’s “Fox News Sunday,” 2/26/06)

“Romney ... Criticized The Medicare Prescription Drug Package As Too Expensive.” (Susan Milligan, “Romney Faults Bush On War, Medicare, And Ports Pact,” *The Boston Globe*, 2/27/06)

- **Romney:** “Well, I think we have a great advance in our health care in the country by providing prescription drugs to seniors. But I think that we cannot afford a major new entitlement.” (Fox’s “Fox News Sunday,” 2/26/06)
- **Romney:** “In fact, we need to find a way to reduce our entitlement burden, particularly as the baby boomers get ready to retire.” (Fox’s “Fox News Sunday,” 2/26/06)

Romney Attacked Bush White House Record On Health Care, Prescription Drugs

Romney Faulted White House For Not Tackling Broader Entitlement Reform During Part D Debate. “Massachusetts Gov. Mitt Romney (R) put some distance ... between himself and the Bush Administration on the issue of health care, criticizing the White House for failing to demand significant reforms in Medicare and Medicaid when Congress enacted a prescription drug benefit for senior citizens.” (Dan Balz and Chris Cillizza, “A Romney-Kerry Rivalry?” *The Washington Post*, 1/27/06)

- **“Romney Said ... The Administration Created A New And Costly Entitlement Program Without Exacting Changes Aimed At Holding Down Costs.”** (Dan Balz and Chris Cillizza, “A Romney-Kerry Rivalry?” *The Washington Post*, 1/27/06)

Romney Wanted To Finance Drug Benefit With Savings Achieved From Overall Health Care Reforms. “I would have hoped to do it differently ... I would have hoped to include within the additional prescription benefit certain reforms to Medicaid, Medicare and our entire health care system to be able to pay for a very helpful prescription benefit ... It’s a new entitlement program, and I would have wanted to finance that entitlement with reforms and changes and adjustments in the overall program.” (Dan Balz and Chris Cillizza, “A Romney-Kerry Rivalry?” *The Washington Post*, 1/27/06)

MASSACHUSETTS HEALTH INSURANCE PLAN

Romney Used To Take Credit For State’s 2006 Health Insurance Law, Calling It “Once In A Generation” Achievement

April 2006: Romney Went Extra Mile To Stage “Near-Presidential” Signing Ceremony, Including Slogan-Bearing Banners And A Fife-And-Drum Corps. “In a Colonial-era hall, with a fife-and-drum corps marching in with him, Gov. Mitt Romney (R) signed a bill Wednesday requiring all Massachusetts residents to purchase health insurance – portraying the measure as a historic solution to health-care costs, even as questions emerge about

whether the state can afford it. The signing [was] staged with a near-presidential attention to theatrics and slogan-bearing banners ... 'I want to express appreciation to Cecil B. DeMille for organizing this event,' quipped Romney, who is considering a run for president in 2008, and seems likely to use his work on the bipartisan health-care bill as a talking point on the campaign trail." (David A. Fahrenthold, "Mass. Marks Health-Care Milestone," *The Washington Post*, 4/13/06)

"Romney, As He Prepares For A Potential White House Bid In 2008, Is Casting The Bill As A Republican Solution To The Healthcare Crisis Democrats Have Failed To Fix." (Scott Helman, "Author, Author," *The Boston Globe*, 4/16/06)

- ***Boston Herald*:** "Romney ... hailed the legislation as a national model that can be replicated to help eliminate inequities in the nation's system of paying for health care." (Casey Ross, "Critics Slam Insurance Plan As Intrusive And Unwieldy," *Boston Herald*, 4/13/06)
- ***USA Today*:** "Romney has touted the law as a national model for universal health care coverage without a government-run system." (Paul Leavitt and William Welch, "Health Coverage Now Requirement In Mass.," *USA Today*, 4/13/06)

Romney Called Health Bill "Once In A Generation" Achievement, Claiming "Massachusetts Is Leading The Way." "Governor Mitt Romney signed landmark legislation today that through a private, market-based reform will make health insurance available to every resident of Massachusetts within the next three years. 'An achievement like this comes around once in a generation, and it proves that government can work when people of both parties reach across the aisle for the common good,' said Romney. 'Today, Massachusetts is leading the way with health insurance for everyone, without a government takeover and without raising taxes.'" (Gov. Mitt Romney, Press Release, 4/12/06)

On Day Of Signing Ceremony, Romney Told Fox News He'd "Authored" The Measure. "Was it a slip of the tongue by Governor Mitt Romney, or a subtle effort to take credit for the healthcare bill? Hours after he signed the bill Wednesday in an elaborate ceremony at Faneuil Hall, Romney told Fox News that he 'authored' the bill, which was actually crafted not just by the governor and his administration, but by several state legislators, their staffs, healthcare advocates, and representatives of the business community and the healthcare industry." (Scott Helman, "Author, Author," *The Boston Globe*, 4/16/06)

- **"Host Of Democratic Legislators ... And Sen. Edward M. Kennedy" Attended Romney's Signing Ceremony.** "Also attending the [signing] ceremony were a host of Democratic legislators, who overwhelmingly passed the bill, and Sen. Edward M. Kennedy, D-Mass., a frequent target of conservatives but a collaborator with Romney on the measure." (Glen Johnson, "Romney Plays Down Health Care Plan," *The Associated Press*, 4/12/07)
- **Romney Called The Measure "Landmark" Accomplishment.** "The reason this is so landmark is that we have found a way, collectively, to get all of our citizens insurance without some new government-mandated takeover or a huge new tax program." (Casey Ross, "Critics Slam Insurance Plan As Intrusive And Unwieldy," *Boston Herald*, 4/13/06)

Romney Said Final Legislation "Incorporates About 95 Percent Of My Original Proposal." "The final legislation incorporates about 95 percent of my original proposal. So I think, overall, it is a major step forward. We will have health insurance for all our citizens without a government takeover and without new taxes required." (Jennifer Barrett, "Person Of Faith," *Newsweek.com*, 6/7/06)

Romney Press Release Included Quote From National HHS Secretary Urging "Policy Makers In Statehouses And Congress" To Follow Massachusetts' Lead. "Former U.S. Health and Human Services Secretary Tommy G. Thompson commended Governor Romney for signing what Thompson termed 'groundbreaking legislation to provide health coverage to all Massachusetts families.' 'Massachusetts is showing us a better way, one I hope policy makers in Statehouses and Congress will follow to build a healthier and stronger America,' said Thompson, a former Republican governor of Wisconsin." (Gov. Mitt Romney, Press Release, "Romney Signs Landmark Health Insurance Reform Bill," 4/12/06)

Romney Proposal "Requiring Individuals To Buy Health Insurance ... Gave Democrats The Political Cover They Needed" On More Controversial Parts Of Health Bill. "The Governor was also the one who put on the table the idea of requiring individuals to buy health insurance if they were not covered by their employers—a move that gave Democrats the political cover they needed to put other controversial parts of the plan into place." (Karen Tumulty, "What Romney Believes," *Time*, 5/21/07)

Romney Advocated For Bill's Passage, Lobbying Reluctant Business Leaders To Get On Board

Prominent Business Leader Claimed Romney Convinced Him To Support Universal Health Insurance Bill. "On Wednesday, Governor Romney held a listening session with business leaders about the bill ... One noted dissenter had been Chris Anderson, president of the Massachusetts High Technology Council. ... So imagine my surprise when I asked Anderson how to characterize his feelings on the legislation after the meeting and got this reply: 'Supportive.' Supportive? 'The bill could be a national model if implemented properly,' said Anderson, who added that Romney had persuaded him it would be." (Scot Lehigh, "Will Public Buy The Healthcare Plan?" *The Boston Globe*, 4/7/06)

Romney Recently Has Re-Embraced His Program After Distancing Himself From It

 **Romney, During Reagan Library Debate, On The Bill: "I Love It."** POLITICO'S JOHN HARRIS: "Governor Romney a year ago it seemed that you couldn't wait to tell about your health care experiment in Massachusetts. Since then, it's been criticized by conservatives as something Hillary Clinton could be devised. You hardly mention it on your website. What's changed?" ROMNEY: "I love it. It's a fabulous program." (MSNBC Republican Presidential Candidates Debate, Simi Valley, CA, 5/3/07)

Romney Was Perceived To Be Running Away From His Own Plan As Flaws Emerged And Conservatives Revolted

Romney Often Avoids Speaking Of His Health Care Reform Measure, Which "Many On The Right Abhor As A Classic Example Of Big Government." "As Mitt Romney aggressively courts conservatives in his bid for the Republican presidential nomination, landmark health-care legislation that the former Massachusetts governor signed into law about a year ago has been largely left out of his pitch. ... When he does speak about the measure, which many on the right abhor as a classic example of big government, his comments are measured, even though when he signed it on April 12, 2006, he described the legislation by saying, 'an achievement like this comes around once in a generation.'" (Perry Bacon Jr., "Romney Plays Down Role In Health Law," *The Washington Post*, 4/13/07)

- **When Romney Does Address His Plan, He Complains Of Provisions Added By Democrats.** "In his major speeches, including the announcement of his candidacy in Michigan in February, Romney has often omitted mention of the health-care law. When he does talk about it, he frequently complains about provisions the legislature added that he opposed." (Perry Bacon Jr., "Romney Plays Down Role In Health Law," *The Washington Post*, 4/13/07)
- **Romney Claims Democrats Will Be To Blame If His Health Reforms Fail.** "Romney told Maryland conservatives this month that the law was a bipartisan creation. He emphasized that the state's Democratic leadership is handling the rollout. This has become a common theme. In January, Romney said much the same thing during a forum hosted by the conservative *National Review* magazine. 'We believed we'd get everybody insured in an economic way, but I don't know what is going to happen down the road as the Democrats get their hands on it,' Romney said." (Sean Higgins, "Ex-Gov. Romney Keeps Distance From His Own Mass. Health Plan," *Investor's Business Daily*, 3/7/07)

Wall Street Journal: Romney Oversold Virtues Of Healthcare Plan, Imposed Government Mandate And Now Distances Himself From Own Policy. "[Romney] made a big deal of the health-care 'reform' he steered through the Massachusetts legislature last year, and we suppose he deserves credit for trying. But he oversold the results – to the applause of the national health-care lobby – and imposed an insurance mandate without reforming the state insurance market. As it unfolds, this law is turning out to be far from a free-market success. And so now Mr. Romney is distancing himself from it – never mind that he upbraided his critics last year for not understanding its virtues. The episode suggests a thin political skin and perhaps a too malleable policy core." (Editorial, "The GOP Field," *Wall Street Journal*, 2/10/07)

"Romney Has Subtly Lowered Expectations For The Law He Championed As Governor." "At recent political appearances, Romney has subtly lowered expectations for the law he championed as governor. At the Dartmouth-Hitchcock Medical Center in New Hampshire on Thursday, he warned that the Democrat-dominated Massachusetts Legislature may cause the collapse of a system he helped design. ... Romney sounded a similar warning in Washington last weekend at a forum sponsored by the *National Review*." (Rick Klein, "Romney Distances Self From Mass. Health Plan," *The Boston Globe*, 2/3/07)

- **“With Signs Emerging That His Signature Healthcare Plan Faces Hurdles ... Romney Has Begun To Distance Himself From The New Law And Is Suggesting That Democrats Will Be To Blame If The Plan Falters.”** (Rick Klein, “Romney Distances Self From Mass. Health Plan,” *The Boston Globe*, 2/3/07)

Investor’s Business Daily: “He’s Now A Critic Of His Own Biggest Achievement.” “As governor of Massachusetts he signed a bipartisan law intended to ensure that every resident has coverage. Romney touted it as an innovative free-market solution. Yet these days, Romney ... is much more likely to present his state’s universal coverage law as not a model to copy but an example for other states to learn from. He’s now a critic of his own biggest achievement. That’s likely because the law, which requires uninsured residents to buy insurance by July through a state agency or be fined, is proving to be more costly to consumers than anticipated, even for those who already had coverage.” (Sean Higgins, “Ex-Gov. Romney Keeps Distance From His Own Mass. Health Plan,” *Investor’s Business Daily*, 3/7/07)

- **“At Last Week’s Conservative Political Action Conference ... Romney Never Mentioned The Law In Two Speeches.”** (Sean Higgins, “Ex-Gov. Romney Keeps Distance From His Own Mass. Health Plan,” *Investor’s Business Daily*, 3/7/07)

Romney Also Distanced Himself From Health Plan During 2007 Appearance At Club For Growth Convention. “At a closed-door meeting of the Club for Growth, a conservative anti-tax group, last month in Palm Beach, Fla., he soft-peddled his role in the bill, said Pat Toomey, the group’s president. ‘He was very quick to say the final product was not what he had initially proposed to the legislature,’ Toomey said. ‘He was very open about saying this could be a better bill and other states might find some things and make them better.’” (Perry Bacon Jr., “Romney Plays Down Role In Health Law,” *The Washington Post*, 4/13/07)

National Center For Public Policy Research’s David Hogberg: Romney “Is Now Slowly Backing Away From His Health Care Plan,” Noting “RomneyCare Was A Pretty Liberal Health Care Plan Right From The Start.” “Mitt Romney’s most-heralded achievement as governor of Massachusetts was his overhaul of the Bay State’s health care system. However, as I’ve noted on the AmSpec blog, ‘RomneyCare’ began running into problems pretty quickly. After much initial self-promotion, Romney now is slowly backing away from his health care plan, hinting that the Democrats now in charge should be blamed if it flops. ‘I was a little concerned at the signing ceremony when Ted Kennedy showed up,’ Romney recently quipped.” (David Hogberg, “Mitt’s Biggest Flop,” *The American Spectator Blog*, www.amspec.org, 3/30/07)

- **Hogberg: Romney “Trying To Deflect Blame For The Law’s Problems Onto His Successors.”** “The fact is that then-governor Romney was all too eager to promote and sign RomneyCare into law last year despite its shortcomings. He did it because, up to that point, he had no notable achievements as governor – not a record one could use to run for president. Now, he is trying to deflect blame for the law’s problems onto his successors. Personal responsibility, indeed.” (David Hogberg, “Mitt’s Biggest Flop,” *The American Spectator Blog*, www.amspec.org, 3/30/07)
- **“[T]he Fact Is That RomneyCare Was A Pretty Liberal Health Care Plan Right From The Start.”** (David Hogberg, “Mitt’s Biggest Flop,” *The American Spectator Blog*, www.amspec.org, 3/30/07)
- **“Romney Is Now Avoiding Responsibility For RomneyCare.”** (David Hogberg, “Mitt’s Biggest Flop,” *The American Spectator Blog*, www.amspec.org, 3/30/07)

National Review’s David Frum: Romney Avoiding Talk Of His Own Health Plan Is “Great Disappointment.” “[B]ecause many conservatives dislike his Massachusetts healthcare plan, he prefers to avoid the subject. Instead we get empty talk about ‘waste, fraud, and abuse.’ It’s a great disappointment.” (David Frum, “Romney & Spending 2,” www.nationalreview.com, 4/25/07)

Romney Aide Claims Law Is Now “Different From The Approach The Governor Submitted.” “[Romney aide Kevin] Madden stressed the law now ‘is different from the approach the governor submitted’ and is in the hands of ‘a state government that he is no longer in charge of.’ So if the plan does work, he can still claim authorship. If not, his distancing might prove a canny move.” (Sean Higgins, “Ex-Gov. Romney Keeps Distance From His Own Mass. Health Plan,” *Investor’s Business Daily*, 3/7/07)

- **“Romney Told Reporters That He Cannot Be Held Responsible For Decisions That Beacon Hill Lawmakers Make About The Sweeping Plan Now That He Is Out Of Office.”** (Rick Klein, “Romney Distances Self From Mass. Health Plan,” *The Boston Globe*, 2/3/07)

Despite Romney's Denials, "[E]ven Bay State Democrats Say He Played A Major Role In The Law's Creation." "Romney's action on health care was pushed by a coalition of liberal groups who were considering a ballot initiative to expand health coverage if the state did not do anything, but even Bay State Democrats say he played a major role in the law's creation. Many of the law's core elements, including the requirement that all people in the state get insurance, were in Romney's original proposal in 2005." (Perry Bacon Jr., "Romney Plays Down Role In Health Law," *The Washington Post*, 4/13/07)

Romney's Comments On His Own Health Plan Are A Marked Shift From Early 2006. "At a September forum in D.C. he urged other states to 'improve' on the Massachusetts model. 'Would I adopt this at a national level? No. Let's experiment,' he said. That's a shift from early 2006, when Romney touted the law as proof that conservative health care reforms can work. Critics such as Mike Cannon of the Cato Institute say Romney is fleeing from his own program." (Sean Higgins, "Ex-Gov. Romney Keeps Distance From His Own Mass. Health Plan," *Investor's Business Daily*, 3/7/07)

Plan Encountering Higher Costs And More Bureaucracy Than Romney Promised

All Residents Must Purchase Some Form Of Health Insurance By July 1, 2007 Or Face Tax Penalties. "The Commonwealth Health Insurance Connector Authority also voted to give residents until Jan. 1, 2009, to comply with the stringent new rules. All individuals who do not obtain a waiver must buy some insurance by July 1 or face a tax penalty in 2008. The postponement of the more stringent requirements was designed to allow businesses more time to voluntarily improve their health insurance plans and give insured individuals time to upgrade." (Alice Dembner, "State Board OK's Basic Drug Coverage In Universal Plan," *The Boston Globe*, 3/21/07)

Deductibles As High As \$4,000 Per Family Would Place Undue Burden On Many Massachusetts Residents. "[O]ne of the strategies used to keep premium prices under control has come under fierce criticism from some advocates for low-income residents: the high deductibles. Harvard Pilgrim's deductibles are \$1,500 for an individual and \$3,000 for a family. Two of the other Boston-area plans have deductibles of \$2,000 for individuals and \$4,000 for families, and Blue Cross has no deductible. Copayments and coinsurance – in which members pay a percentage of the total bill – add to subscribers' expenses. The annual maximum payment for most plans is \$5,000 for an individual and \$10,000 for a family." (Jeffrey Krasner, "State Got Insurers To Trim Health Rates," *The Boston Globe*, 3/30/07)

- **Brother Jack Rathschmidt Of The Greater Boston Interfaith Organization:** "For some families the possibility of having to pay \$10,000 in premiums, copays, deductibles, and prescriptions is way beyond their means." (Jeffrey Krasner, "State Got Insurers To Trim Health Rates," *The Boston Globe*, 3/30/07)

Over 200,000 People Who Already Have Insurance May Be Forced To Buy Additional Coverage. "The threat of state oversight came as insurers warned that more than 200,000 Massachusetts residents who already have health insurance would be forced to buy additional coverage to meet the proposed minimum standards under the law." (Steve LeBlanc, "State May Mandate Health Plan Rates," *The Associated Press*, 1/31/07)

Rules Will Require All Insured Adults To Have Prescription Drug Coverage. "Massachusetts is poised to become the first state to require that all adults have health insurance that includes prescription drug coverage. A state board voted unanimously yesterday to require drug coverage as part of draft rules for the minimum insurance that everyone older than 18 must have, under the state's universal health insurance law." (Alice Dembner, "State Board OK's Basic Drug Coverage In Universal Plan," *The Boston Globe*, 3/21/07)

- **"The Board Declined To Support A Last-Minute Plea From Business Leaders And Insurers To Allow Plans Without Drug Coverage And To Extend The Deadline To July 2009."** (Alice Dembner, "State Board OK's Basic Drug Coverage In Universal Plan," *The Boston Globe*, 3/21/07)
- **Mandatory Drug Coverage May Mean 15% Higher Premium For Average 30-Year-Old In Good Health.** "It turns out that, as feared, the Commonwealth Health Insurance Connector Board has decided some individuals will be forced to purchase more insurance than they want or need – specifically prescription drug coverage. That means a healthy 30-year-old who may take the occasional Tylenol for a headache will have no choice but to pay about 15 percent more in premiums to guarantee prescription drug coverage. It's the same old 'we know what's good for you' approach that brought us mandatory coverage for chiropractic services." (Editorial, "The Health Care Hurdles," *Boston Herald*, 3/22/07)

Business Leaders Remain Wary Of Proposed New Laws. "[B]usiness leaders said they would continue to press for changes. 'We remain concerned that the proposed standard will in the future eliminate affordable

products currently available in today's marketplace,' Jon B. Hurst, president of the Retailers Association of Massachusetts, and William Vernon of the National Federation of Independent Businesses, said in a statement yesterday." (Alice Dembner, "State Board OK's Basic Drug Coverage In Universal Plan," *The Boston Globe*, 3/21/07)

Critics Fear High Costs Of Care And Lack Of Affordable Plans Could Cause Repeat Of Failed 1988 Universal Coverage Effort. "Critics claim that the new law lacks adequate funding and cost controls that would assure long-term success. They fear that Massachusetts' exorbitant health-care costs and the dearth of affordable health plans ultimately could derail the measure, much the same way that opposition from the business community helped kill a 1988 law that also sought statewide universal health coverage." (Tony Pugh, "Experts Debate Plan's Potential For National Impact," *Knight Ridder*, 4/13/06)

Officials Warn Costs Must Be Controlled Or Program Will Be Unsustainable

Officials Say Health Care Costs Must Be Controlled Or Program Will Not Be Sustainable. "To sustain the landmark Massachusetts health insurance initiative, the state must find ways to control the climbing costs of healthcare, policy-makers said yesterday at a forum on the first year of healthcare reform."

- **MA State Senate President Therese Murray (D):** "If we do not constrain healthcare costs, the system we worked so hard to create and implement will collapse." (Alice Dembner, "Officials Say State Must Curb Health Cost," *The Boston Globe*, 5/15/07)

Initiative Will Cost "Nearly \$1.7 Billion" This Year And Federal Government Says It Will Not Provide "Significant Increases" In Funding Going Forward. "The insurance initiative, designed to ensure most Massachusetts residents have coverage, is expected to cost nearly \$1.7 billion this year. The federal government, which is providing the bulk of funding, has said it will not provide significant increases in future years." (Alice Dembner, "Officials Say State Must Curb Health Cost," *The Boston Globe*, 5/15/07)

Plan Will Cost Millions More Than Anticipated While Exempting 20% Of Uninsured From Coverage Mandate

On One Year Anniversary Of Romney's Plan Becoming Law, State Administrative Board Announced Nearly 20% Of Uninsured Adults Would Be Exempted From Coverage Mandate. "To remove the threat of a public backlash, the state plans to exempt nearly 20 percent of uninsured adults from the state's new requirement that everyone have health insurance. The proposal, expected to be approved by a state board today, is based on calculations that even the lowest-cost insurance would not be affordable for an estimated 60,000 people with low and moderate incomes who do not qualify for state subsidies. Forcing them to buy insurance or pay a penalty could jeopardize the rest of the state's initiative, officials said. Instead, the state board appears prepared to settle for near universal coverage, all but 1 percent of the state's population." (Alice Dembner, "Health Plan May Exempt 20% Of The Uninsured," *The Boston Globe*, 4/12/07)

- **"The Decision Has Been Widely Seen As One That Could Make Or Break The Success Of The Initiative."** (Alice Dembner, "Health Plan May Exempt 20% Of The Uninsured," *The Boston Globe*, 4/12/07)

Board's Plan Also Included Expanded Subsidies For Over 50,000 Low-Income Residents And Would Extend More Free Coverage – Costing State An Extra \$13 Million Over Next Fiscal Year. "In addition to the exemptions, the proposal from the Connector Authority staff would expand subsidies for 52,000 of the lowest-income individuals and families who qualify for a state-sponsored insurance program called Commonwealth Care. Specifically, it would extend free coverage to individuals earning up to about \$15,000 a year and families of four earning up to \$31,000. ... The increased subsidies would cost the state about \$13 million more than the \$470 million estimated for the fiscal year that starts July 1." (Alice Dembner, "Health Plan May Exempt 20% Of The Uninsured," *The Boston Globe*, 4/12/07)

MIT Economist Jonathan Gruber Backed Proposal, But Cautioned "We Can't Solve All Our Problems By Spending More." "Jonathan Gruber, an MIT economist on the [Connector] board, also said he would support the proposal although he believes that 'people can afford health insurance at higher levels than the compromise.' 'My primary concern is fiscal,' he said. '... We can't solve all our problems by spending more.'" (Alice Dembner, "Health Plan May Exempt 20% Of The Uninsured," *The Boston Globe*, 4/12/07)

Pacific Research Institute's Sally Pipes: Plan Falls 20% Short Of Goal With Costs To "Skyrocket." "[O]ne year in, we have a plan that, even if no more concessions to liberal advocates are made, falls 20 percent short of its stated goal. Its costs have already increased by at least \$13 million and are on track to skyrocket by some

multiple of this once the doctors' bills start coming in. Happy Birthday." (Sally C. Pipes, Op-Ed, "At One Year, Mass. Healthcare Plan Falls Short," *The Boston Globe*, 5/15/07)

- **Pipes Called Plan "A Gourmet Recipe For Runaway Spending."** "The structure is a gourmet recipe for runaway spending. With this level of premium, those who don't value insurance enough to make financial sacrifice to purchase it will neglect to do so. The fine – set at \$216 – will be more attractive than the premium. Politicians will be under strong pressure to not enforce the mandate once the fines increase to meaningful levels." (Sally C. Pipes, Op-Ed, "At One Year, Mass. Healthcare Plan Falls Short," *The Boston Globe*, 5/15/07)

Romney Health Plan Expanded Access To Abortion, Required Planned Parenthood Representative On State Panel

October 2006: Romney Took Credit For "Officially" Launching Commonwealth Care, Calling It "Key Component" Of RomneyCare. "The following information was released by the Massachusetts Office of the Governor: Governor Mitt Romney today officially launched Commonwealth Care, an innovative health insurance product that will allow thousands of uninsured Massachusetts residents to purchase private health insurance products at affordable rates. Commonwealth Care is a key component of the state's landmark healthcare reform law approved by the Governor in April. 'We are now on the road to getting everyone health insurance in Massachusetts,' said Governor Romney. ... 'Today, we celebrate a great beginning.'" ("Romney Unveils First New Healthcare Reform Product," *States News Service*, 10/2/06)

- **"On Oct. 2, Romney Traveled To Dorchester To Announce The First Enrollee In The Commonwealth Care, Part Of The State's New Universal Health Plan."** (Glen Johnson, "Romney Skips Marine's Funeral To Campaign Out Of State," *The Associated Press*, 10/13/06)
- **Romney:** "Earlier this year, I offered a plan called Commonwealth Care that opens the market to much lower-cost insurance than is now available." (Mitt Romney, Op-Ed, "Health-Care Reform Gets A Fair Shake," *Boston Herald*, 6/21/05)

Commonwealth Care, Which Is "Funded By The State," Provides Access To Abortion Services. "Commonwealth Care is run by the Commonwealth Health Insurance Connector Authority and funded by the state. ... Commonwealth Care health plans include: outpatient medical care (doctor's visits, surgery, radiology and lab, abortion, community health center visits) ..." (MassResources Website, www.massresources.org, Accessed 2/5/07)

Romney's Health Care Plan Also Requires That One Member Of MassHealth Payment Policy Board Must Be Appointed By Planned Parenthood Of Massachusetts. From Chapter 58 of the Acts of 2006: "SECTION 3. Chapter 6A of the General Laws is hereby amended by inserting after section 16I the following 6 sections: . . . Section 16M. (a) There shall be a MassHealth payment policy advisory board. The board shall consist of the secretary of health and human services or his designee, who shall serve as chair, the commissioner of health care financing and policy, and 12 other members: ... 1 member appointed by Planned Parenthood League of Massachusetts ..." (Massachusetts General Court Website, www.mass.gov, Accessed 2/5/07)

- **Romney Failed To Veto Section Of Law Requiring Planned Parenthood Representation.** Romney vetoed Sections 5, 27, 29, 47, 112, 113, 134 and 137. Romney did not veto Section 3, which contained the mandated Planned Parenthood representative on the MassHealth payment policy advisory board. (Massachusetts General Court Website, www.mass.gov, Accessed 2/5/07)

National Center For Public Policy Research's David Hogberg: Planned Parenthood Issue "Yields A Sense Of How Much Romney Gave Away To The Liberals" On Health Care Plan. "The reform creates 11 new councils, boards, commissions and bureaus. One of the new boards, the MassHealth Payment Policy Advisory Board, yields a sense of how much Romney gave away to the liberals in the state legislature. It must include a member appointed by the Planned Parenthood League of Massachusetts." (David Hogberg, "Romney's Responsibility Principles," *The American Spectator*, 4/14/06)

Planned Parenthood Mandate Called "Controversial Provision ... That Will Not Help Romney With The GOP Base's Abortion Opponents." "Another controversial provision in the Massachusetts plan creates a board on health-care financing that must include one member of the state's Planned Parenthood office, something that will not help Romney with the GOP base's abortion opponents." (Perry Bacon Jr., "Romney Plays Down Role In Health Law," *The Washington Post*, 4/13/07)

Free Market Advocates And Health Care Experts Criticize Romney's Plan

Conservatives Have Criticized Romney's Health Reform As Big Government Plan To Force Insurance Mandate On All Citizens With Threat Of Tax Penalties As Punishment. "During the past 12 months, Romney has moved from governor to Republican presidential contender, and some conservatives have criticized the plan as fostering big government. The program, which Romney signed into law a year ago Thursday, includes a requirement that everyone in Massachusetts get some form of health insurance by July 1. If they don't, they face a series of increasing tax penalties. That mandate amounts to an 'unprecedented expansion of government power,' says Michael Tanner, a health policy expert at the Cato Institute, a libertarian Washington think-tank." (Glen Johnson, "Romney Plays Down Health Care Plan," *The Associated Press*, 4/12/07)

- **"Even Coverage For Those Already With Insurance Must Meet State-Prescribed Minimums. The Insurance Mandate, The Former Governor Says, Is A Means Of Ensuring 'Personal Responsibility'..."** (Glen Johnson, "Romney Plays Down Health Care Plan," *The Associated Press*, 4/12/07)

Cato Institute's Michael Tanner: "Slippery Slope To Government Control Of Health Care." "In my paper on then-Governor Romney's plan, I warned that the state's new managed competition bureaucracy, the Commonwealth Health Insurance Connector Authority, would operate as a regulatory body, setting up just such a slippery slope to government control of health care. The more we see from Massachusetts, the more it looks like I was right." (Michael D. Tanner, "Romneycare: The Slippery Slope Slips Some More," Cato Institute Blog, www.cato-at-liberty.org, 3/21/07)

- **Tanner: "In Essence, You Have Romney Embracing 'Hillarycare.'"** "There is a likening of this central concept of his — the Connector — to managed competition, which was at the heart of the 1993 Clinton health care proposal ... In essence, you have Romney embracing 'Hillarycare,' and that doesn't play well on the right." (Glen Johnson, "Romney Plays Down Health Care Plan," *The Associated Press*, 4/12/07)
- **Tanner: "This Mandate Is Unprecedented."** "'This mandate is unprecedented,' said Michael Tanner, a health expert at the Cato Institute, a conservative think tank in Washington. 'It's the first time a state has said simply because you live there you must buy a specific product. If he wants to be the Republican who embraces Hillary-care, I don't think that's going to go hand in hand with him trying to portray himself as Ronald Reagan's heir.'" (Perry Bacon Jr., "Romney Plays Down Role In Health Law," *The Washington Post*, 4/13/07)

Pacific Research Institute's Sally Pipes: "RomneyCare Is In The Intensive Care Unit, Soon To Be Wheeled Into Hospice." "When then-Gov. Mitt Romney, a Republican, introduced a universal health-insurance plan in the Bay State early last year, it was widely acclaimed. But less than a year after passage, RomneyCare is in the intensive care unit, soon to be wheeled into hospice." (Sally Pipes, Op-Ed, "Intensive Care For RomneyCare," *The Wall Street Journal*, 2/26/07)

- **Pipes Criticized Plan's Reliance On Regulators "Dictating Health-Insurance Design" By Creating Minimum Insurance Standards.** "Regulators are however settling in comfortably to their jobs, dictating health-insurance design by creating the standards for Minimum Creditable Coverage (MCC) that individuals must meet to avoid paying the fine. If these standards are implemented, they would render illegal roughly 200,000 high-deductible policies currently in force — exactly the sort of insurance that makes sense for the self-employed and young individuals." (Sally Pipes, Op-Ed, "Intensive Care For RomneyCare," *The Wall Street Journal*, 2/26/07)

Cato Institute's Mike Cannon: Wheels Are Coming Off RomneyCare. "It looks like the wheels are coming off ... it is costing more to the individual consumer and the taxpayer than they said it would. His story now is that is not how we envisioned it." (Sean Higgins, "Ex-Gov. Romney Keeps Distance From His Own Mass. Health Plan," *Investor's Business Daily*, 3/7/07)

National Center for Public Policy Research's David Hogberg: Romney Had "Little Excuse" For Not Realizing His Plan Would Cost More Than Advertised. "In April 2006, Romney claimed that his plan would 'need no new taxes.' By November, as he was leaving office, it was clear that the plan would cost \$150 million more in 2007 than Romney had initially claimed. Government programs almost always cost more than advertised, and Romney had little excuse for not realizing this." (David Hogberg, "Mitt's Biggest Flop," *The American Spectator* Blog, www.amspec.org, 3/30/07)

Harvard Professor Regina Herzlinger: Plan Will Hurt Small Businesses And Compel Outsourcing. "One health specialist speaking to the *Wall Street Journal* predicted that the plan would require a subsidy of about \$700 million — about four times what the plan provides. We asked Regina Herzlinger, a professor at the Harvard Business School and a fellow at the Manhattan Institute what she thinks of the plan. ... She predicts it will hurt

businesses, especially small ones; it will force employers to favor capital improvements over labor, and compel outsourcing of jobs overseas.” (Editorial, “Big Health In Massachusetts,” *The Washington Times*, 4/6/06)

Boston University School Of Public Health’s Dr. Alan Sager: “We Will Look Back At This New Legislation As A Well-Motivated But Naive, Underfunded Political Approach.” (Tony Pugh, “Experts Debate Plan’s Potential For National Impact,” *Knight Ridder*, 4/13/06)

Galen Institute President Grace-Marie Turner: “Massachusetts May Not Have A Miracle, But Rather A Muddle, On Its Hands.” “[I]f Massachusetts is the model, others may want to go back to the drawing board. The details show Massachusetts may not have a miracle, but rather a muddle, on its hands.” (Grace-Marie Turner, Op-Ed, “Universal Health Care: Proceed with Caution,” *National Review Online*, 1/31/07)

- **“Plethora Of Mandates” And Numerous Boards And Commissions:** “A plethora of other mandates, reporting requirements, penalties, and enforcement provisions affect both individuals and businesses. ... Massachusetts has created at least ten new boards and commissions to run the new health system, such as the Health Care Quality and Cost Council, the Payment Policy Advisory Board, and the Health Access Bureau.” (Grace-Marie Turner, Op-Ed, “Universal Health Care: Proceed with Caution,” *National Review Online*, 1/31/07)

Many Conservatives Feel Elements Of Romney-Care Are “Anathema To Their Principles.” “Romney’s recent comments underscore how sensitive an issue the plan is with conservative audiences, whose support is crucial to his presidential aspirations. Many conservatives view the concept of requiring individuals to purchase health insurance – and penalizing some businesses that don’t offer it – as anathema to their principles.” (Rick Klein, “Boston Globe: Romney Distances Self From Mass. Health Plan,” *The Boston Globe*, 2/3/07)

The Heritage Foundation – One Of The Few Conservative Groups Praising Romney’s Plan – Received \$25,000 Donation From Romney Months Before The Bill Became Law

Heritage Foundation Is One Of Few Conservative Groups Praising Romney’s Health Insurance Plan. “‘The Connector is a new market arrangement_ a health insurance exchange — in which individuals and families can choose and own portable health insurance without the loss of the current generous federal tax benefits,’ Robert E. Moffit, the director of the Heritage Foundation’s Center for Health Policy Studies, wrote in a recent policy memo.” (Glen Johnson, “Romney Plays Down Health Care Plan,” *The Associated Press*, 4/12/07)

“Romney Made A Personal Contribution Of \$25,000 To The Think-Tank In December 2005, Although A Heritage Spokesman Said It Had No Influence Over The Group’s Opinions.” (Glen Johnson, “Romney Plays Down Health Care Plan,” *The Associated Press*, 4/12/07)

Conservative Media Criticize Romney’s Plan As Unfunded Big-Government “Misfire”

Wall Street Journal Blasted Romney’s Big-Government Plan As “Mitt’s Market Misfire.” “Massachusetts Governor Mitt Romney signed a bill recently that’s being praised as a model for how to achieve ‘universal’ health care. But while the governor claims his plan is market based, it does little to reform the regulations that have made coverage in his state among the most expensive in the country.” (Editorial, “Mitt’s Market Misfire,” *Wall Street Journal*, 4/24/06)

- **“Guaranteed Issue” Provision – Which Drives Up Premium Costs For All – Left Unaddressed.** “The new Massachusetts health care legislation does little to address the root causes of this [health insurance] cost problem. Guaranteed issue is explicitly preserved. And while a new insurance regulation board could in theory do something about other costly mandates, it’s not likely to do much in practice.” (Editorial, “Mitt’s Market Misfire,” *Wall Street Journal*, 4/24/06)
 - o **Requires Providers To Cover Applicants Regardless Of Pre-Existing Condition:** “Guaranteed issue is the name of a regulation that requires insurance companies to sell policies to all comers, even those who wait until they’re sick to seek coverage. Naturally the requirement to accept those free riders makes insurance much more expensive for everyone else.” (Editorial, “Mitt’s Market Misfire,” *Wall Street Journal*, 4/24/06)
- **Plan Forces People To Buy “Needlessly Expensive Coverage.”** “We note all this because there’s a far simpler way to begin tackling the problem of the uninsured than the Massachusetts path. To wit: Let the market start operating as it should. ... States like New York and New Jersey, meanwhile, might try getting the regulators out of the way before following the Bay State in forcing people to buy needlessly expensive coverage.” (Editorial, “Mitt’s Market Misfire,” *Wall Street Journal*, 4/24/06)

- **Insurance Costs Remain Well Above National Average:** “The \$200 per month target price Governor Romney is talking about for the state’s new mandatory insurance is higher than 80% of the individual policies eHealthinsurance reported in a study of 80,000 customers nationwide late last year.” (Editorial, “Mitt’s Market Misfire,” *Wall Street Journal*, 4/24/06)

Journal Also Noted Romney’s Plan Forces People “To Buy Insurance Many Will Need Subsidies To Afford.” “[T]he core flaw is that the plan forces individuals to buy health insurance, and penalizes businesses that don’t provide it, before deregulating the market for private health insurance. So the state is forcing people to buy insurance many will need subsidies to afford, which is a recipe for higher taxes and more government intervention down the road. Could this be why Mrs. Clinton, Ted Kennedy and the Families USA government medicine lobby are all praising it to the skies?” (Editorial, “RomneyCare,” *The Wall Street Journal*, 4/12/06)

- **“By Making A Fetish Of ‘Universal’ Coverage, Governor Romney Has Bought Into A Bidding War That Democrats And Advocates Of Socialized Medicine Are Bound To Win In The End.”** (Editorial, “RomneyCare,” *The Wall Street Journal*, 4/12/06)

Washington Times Called Romney Plan “Frankenstein’s Monster Of Tax Penalties, Expanded Government-Insurance Programs And Unfunded Mandates.” “Massachusetts Gov. Mitt Romney had a dream of universal consumer-driven health care. Then he met Beacon Hill and its Democratic legislators. Their plan, introduced this week, is a Frankenstein’s monster of tax penalties, expanded government-insurance programs and unfunded mandates. A presidential aspirant, which Mr. Romney certainly is, will decide what is the best he can do for his state. The rest of us, however, should not take this plan for a model.” (Editorial, “Big Health In Massachusetts,” *The Washington Times*, 4/6/06)

- **Expands Existing Government Programs:** “The fault of this bill is that it really isn’t ‘consumer-driven’ at all. The resource-wasting reliance on third-party payers and employers remains intact as existing government-insurance programs are expanded. So are insurance subsidies.” (Editorial, “Big Health In Massachusetts,” *The Washington Times*, 4/6/06)
- **“[I]ts Unfunded Mandate Is Large Enough To Make Michael Dukakis Blush.”** (Editorial, “Big Health In Massachusetts,” *The Washington Times*, 4/6/06)
- **“Clearly This Is No Model For The Rest Of The Country...”** (Editorial, “Big Health In Massachusetts,” *The Washington Times*, 4/6/06)

Romney’s Health Reforms Praised By Ted Kennedy, Hillary Clinton And John Kerry

Ted Kennedy Attended Signing Of Romney Health Care Plan, Said It’s “Just What The Doctor Ordered.” “Gov. Mitt Romney signed legislation Wednesday that would make Massachusetts the first state to require everyone to have health insurance, just as drivers must have automobile coverage. ... Sen. Edward Kennedy, D-Mass., who attended the signing ceremony in Boston’s historic Faneuil Hall, praised Romney for giving the state ‘just what the doctor ordered.’ ‘With the signing of this landmark health reform bill, after so many years of false starts, our actions have finally matched our words and we have lived up to our ideals,’ Kennedy said.” (Steve LeBlanc, “Mass. Governor OKs Landmark Health Bill,” *The Associated Press*, 4/12/06)

“[Hillary] Clinton Praised Romney’s Efforts Yesterday, Telling *The Associated Press*, ‘To Come Up With A Bipartisan Plan In This Polarized Environment Is Commendable.’” (Scott Helman, “On National Stage, Potential Gains And Pitfalls For Romney,” *The Boston Globe*, 4/6/06)

John Kerry, On Romney’s Plan: “I Think It’s Terrific.” “I liked this health care bill that passed. I think it’s terrific. ... We really need to be doing that on the national level.” (MSNBC’s “Imus In The Morning,” 4/6/06)

ENERGY AND ENVIRONMENT

In 2003, Romney Said “I Think The Global Warming Debate Is Now Pretty Much Over”

Romney: “I think the global warming debate is now pretty much over and people recognize the need associated with providing sources which do not generate the heat that is currently provided by fossil fuels ...” (Jack Coleman, “Massachusetts Governor Urges Use Of Alternative Energy,” *Cape Cod Times*, 3/14/03)

Later That Year, Romney Warned Carbon Dioxide Emissions Were Harming The Environment And Agreed To Join Northeast Regional Emissions “Cap And Trade” System

2003: Romney “Acknowledged That Carbon Dioxide Emissions Are Harming The Environment And Agreed To Help Design A Regional Emissions Cap” With Surrounding States. “In another nod to environmentalists, Gov. Mitt Romney has joined with New York Gov. George Pataki in a plan to limit greenhouse gases from Northeast power plants. In a July 21 letter to Mr. Pataki, Mr. Romney acknowledged that carbon dioxide emissions are harming the environment and agreed to help design a regional emissions cap for power generating plants.” (Shaun Sutner, “Romney Joins Bid To Curb Emissions,” *Telegram & Gazette* [Worcester, MA], 8/6/03)

Romney, In July 2003 Letter To Then-Gov. George Pataki (R-NY): “Now Is The Time To Take Action Toward Climate Protection.” “I concur that climate change is beginning to affect our natural resources and that now is the time to take action toward climate protection. ... I share your interest in ensuring that the economic and security contributions made by our electricity generating system are not negated by the impact of emissions from that system on the health of our citizens. ... Our joint work to create a flexible market-based regional cap and trade system could serve as an effective approach to meeting these goals.” (Shaun Sutner, “Romney Joins Bid To Curb Emissions,” *Telegram & Gazette* [Worcester, MA], 8/6/03)

The Economist Named Romney “Climate-Friendly” Republican Along With New York Governor George Pataki And Sen. McCain. “Other ‘climate-friendly’ Republicans include Governor George Pataki of New York, Governor Mitt Romney of Massachusetts and Senator John McCain.” (“Schwarzenegger v Bush?” *The Economist*, 10/2/04)

Less Than Two Years Later, Romney Abruptly Pulled Massachusetts Out Of Compact Agreement On Same Day He Announced He Would Not Seek Second Term

December 2005: Romney “Abruptly” Pulled Out Of Compact Talks Hours Before Deadline For Agreement. “Officials in New York, New Jersey and several other Northeastern states scrambled yesterday to hold together what was left of a landmark regional pact to control power plant emissions after the governors of Massachusetts and Rhode Island abruptly refused to sign on. ... Gov. Mitt Romney of Massachusetts, a Republican who is expected to run for his party’s presidential nomination in 2008, pulled his state out of the agreement yesterday, hours before the deadline for reaching an agreement, and just before announcing that he would not run for a second term next year.” (Anthony DePalma, “Greenhouse Gas Pact Is In Disarray,” *The New York Times*, 12/16/05)

- **“Environmentalists Were Stunned And Angered By Governor Romney’s Decision.”** (Anthony DePalma, “Greenhouse Gas Pact Is In Disarray,” *The New York Times*, 12/16/05)

Romney Pulled Massachusetts Out Of The Pact On December 14 – The Same Day He Announced He Would Not Seek Reelection As Governor. “Massachusetts yesterday pulled out of a landmark multistate pact to reduce carbon dioxide emissions from Northeast power plants, Governor Mitt Romney confirmed last night. ... An announcement of the pact was scheduled for today in New York, but it has been put on hold as the seven remaining states discuss changes because of the loss of the two states.” (Beth Daley, “Mass. Pulls Out Of Agreement To Cut Power Plant Emissions,” *The Boston Globe*, 12/15/05)

- **“Mr. Romney Defended His Actions. ‘I’ve Been In The Deal Business All My Life ... A Deal Is Not A Deal Until Everybody’s Agreed On It.’”** (Anthony DePalma, “Greenhouse Gas Pact Is In Disarray,” *The New York Times*, 12/16/05)

Other States Were Willing To Compromise “But Not To Go As Far As Massachusetts Wanted.” “The other states were willing to compromise, the government officials said, but not to go as far as Massachusetts wanted because they thought it would have undermined the pact’s effectiveness.” (Beth Daley, “Mass. Pulls Out Of Agreement To Cut Power Plant Emissions,” *The Boston Globe*, 12/15/05)

Romney Rejected Plan “Over The Advice Of His Advisers” After Requesting Deadline Extension, Raising Questions About His Intentions Among Other States. “Earlier this month Mr. Romney asked for negotiations to be prolonged past a Dec. 1 deadline. Massachusetts and the other states negotiated intensely and thought they had reached an agreement on a proposal to limit the cost of pollution allowances, thereby protecting customers. ... But Mr. Romney rejected the plan on Wednesday, over the advice of his advisers, prompting officials in other states to wonder whether he had ever intended to accept them at all.” (Anthony DePalma, “Greenhouse Gas Pact Is In Disarray,” *The New York Times*, 12/16/05)

In 2004, Romney Press Event Announcing State Policy To Combat Global Warming Marred By His Refusal To Admit Global Warming Is Happening

At Press Conference Announcing New State Policy To Combat Global Warming, Romney Stated He Wasn't Sure If Global Warming Was Happening. "As he introduced a new state policy to combat global warming, Governor Mitt Romney had a surprise for the environmentalists gathered along the Charles River Esplanade yesterday: Personally, he's not sure global warming is happening. During a news conference at which he formally announced the Massachusetts Climate Protection Plan, Romney said he decided not to take sides in the debate about 'is there global warming or is there not, and what's causing it.' His hedging on the issue surprised some activists ..." (Stephanie Ebbert, "Romney Hedges On Global Warming," *The Boston Globe*, 5/7/04)

Though State Plan Pointed To "Consensus Of Climate Change Scientists" Agreeing That Global Warming Was Happening, Romney Claimed To Be Unconvinced, Wrote Letter Asking "If Climate Change Is Happening." "Though the new state plan points to a 'consensus of climate change scientists' who agree that an increase in greenhouse gases is causing global temperatures to rise, Romney attached a letter to the plan's final version suggesting he remains unconvinced on the issue at the heart of the proposal. 'If climate change is happening, the actions we take will help,' Romney wrote. 'If climate change is largely caused by human action, this will really help. If we learn decades from now that climate change isn't happening, these actions will still help our economy, our quality of life, and the quality of our environment.'" (Stephanie Ebbert, "Romney Hedges On Global Warming," *The Boston Globe*, 5/7/04)

- **Romney:** "I'm not a scientist ... I read one book over the summer that said, 'gee, global warming is happening for reasons unrelated to human participation,' and other reports, far more, indicate, 'no no, it's very much driven by humans.' Well, I don't know." (Stephanie Ebbert, "Romney Hedges On Global Warming," *The Boston Globe*, 5/7/04)

Some Observers Saw Politics Playing Role In Romney Stance. "Some observers see the governor walking a subtle but savvy line between the moderate Massachusetts constituents he is courting and the conservative wing of the national Republican Party, which argues that greenhouse gases do not play a significant enough role in climate change to warrant mandatory reductions." (Stephanie Ebbert, "Romney Hedges On Global Warming," *The Boston Globe*, 5/7/04)

On Same Day In 2005, Romney Supported, Then Opposed Northeast Regional Compact On Climate Change

Romney Initially Called Northeast Regional Compact To Address Greenhouse Gas Emissions "Good Business," Then Retracted His Support Only Weeks Later. "A group of Northeast states has postponed the announcement of a landmark agreement to limit greenhouse gas emissions from power plants after Governor Mitt Romney raised objections to the pact late last week, two government sources familiar with the agreement said yesterday. ... News of the delay comes two weeks after Romney indicated his overall support for the initiative at a conference in Boston, calling it 'good business' because it would prompt Massachusetts companies to develop state-of-the-art clean-energy technology." (Beth Daley and Scott Helman, "Romney Doubts Seen Delaying Emissions Pact," *The Boston Globe*, 11/22/05)

Romney Changed Positions On Regional Agreement Within Span Of One Day. "At a clean-energy conference in Boston on Nov. 7, Romney sounded exuberant about the Northeast state agreement, saying in his speech that it was 'a great thing for the Commonwealth.' 'We can effectively create incentives to help stimulate a sector of the economy and at the same time not kill jobs,' he said. Later that day, however, Romney outlined to reporters several fears he had about the proposed agreement." (Beth Daley and Scott Helman, "Romney Doubts Seen Delaying Emissions Pact," *The Boston Globe*, 11/22/05)

Romney Claim, Circa 2007: "No Question ... It's Getting Warmer"

 **In February 2007, Romney Said "Scientists Haven't Entirely Resolved" Global Warming Question But There's "No Question About One Thing, It's Getting Warmer."** "I have to tell you with regards to global warming that that's something, which, you're right, the scientists haven't entirely resolved, but no question about one thing, it's getting warmer, and a lot of good reasons for us to use less energy, to use it more efficiently and to develop sources here in this country that could allow us to be more independent of foreign sources." (CNBC's "Kudlow & Company," 2/7/07)

Romney “Never Really Contested The Underlying Science” Behind Global Warming Theory. “The debate about the existence of global warming is over. Mitt Romney, the former Massachusetts governor who will probably announce next week that he’s officially a candidate for president in 2008, single-handedly erased any lingering doubts I may have had during his interview yesterday ... Romney gave some vague answers regarding his views on dealing with climate change, other than to emphasize that he wanted market-oriented solutions. But Romney, a guy who is trying to portray himself as a follower of Reaganomics, never really contested the underlying science.” (James Pethokoukis, “Romney, Climate Change, And Growth,” USNews.com, 2/8/07)

Romney Still Attacks “Some In The Republican Party” For “Embracing The Radical Environmental Ideas Of The Liberal Left”

Romney Statement “On The Current Environmental Debate”: Governor Mark Sanford is right. Unfortunately, some in the Republican Party are embracing the radical environmental ideas of the liberal left. As governor, I found that thoughtful environmentalism need not be anti-growth and anti-jobs. But Kyoto-style sweeping mandates, imposed unilaterally in the United States, would kill jobs, depress growth and shift manufacturing to the dirtiest developing nations. Republicans should never abandon pro-growth conservative principles in an effort to embrace the ideas of Al Gore. Instead of sweeping mandates, we must use America’s power of innovation to develop alternative sources of energy and new technologies that use energy more efficiently.” (Romney For President, Inc., Press Release, 2/23/07)

Romney Feels Oil Companies Should Be Investing Their Profits In New Refineries

Romney: “[B]ig Oil Is Making A Lot Of Money Right Now. And I’d Like To See Them Using That Money To Invest In Refineries.” CNN’S WOLF BLITZER: “What do you say to the audience out there who believes that there’s too much of an alliance, if you will, between the big oil companies and Republicans?” ROMNEY: “[W]ith regards to big oil, big oil is making a lot of money right now. And I’d like to see them using that money to invest in refineries. Don’t forget that when companies earn profit, that money’s supposed to be reinvested in growth. And our refineries are old. Someone said to me -- Matt Simmons, an investment banker down in Houston -- he said, ‘Our refineries today are rust, with paint holding them up.’ And we need to see these companies, if they’re making that kind of money, reinvest in capital equipment. But let’s not forget that where the money is being made this year is not just -- and throughout these years -- is not just in Exxon and Shell and the major oil companies. It’s in the countries that own this oil. Russia last year took in \$500 billion by selling oil. Ahmadinejad, Putin, Chavez -- these people are getting rich off of people buying too much oil. And that’s why we have to pursue, as a strategic imperative, energy independence for America.” (Mitt Romney, CNN Republican Presidential Debate, Manchester, NH, 6/5/07)

ROMNEY’S PROPOSED SUV TAX

In 2002 Campaign, Romney Promised To Increase Excise Tax On Vehicles With Low Gas Mileage

One Of Romney’s Top Campaign Promises: “Reworking The Vehicle Excise Tax” To “Encourage The Purchase Of Fuel-Efficient Cars.” “What are your top three environmental/growth priorities? ... Mitt Romney: ... The state must also address the pollution resulting from increased commute times. I propose a 10-year sales tax moratorium on hybrid vehicles and reworking the vehicle excise tax in a revenue-neutral fashion to encourage the purchase of fuel-efficient cars.” (Anthony Flint, “Development’s Impact To Test Next Governor,” *The Boston Globe*, 10/12/02)

Romney Campaign Acknowledged Plan Could “Require Owners Of New SUVs And Other Gas-Guzzlers To Pay A Higher Automobile Excise Tax.” “Romney’s plan to reduce pollution could also require owners of new SUVs and other gas-guzzlers to pay a higher automobile excise tax. As part of his ‘commuter bill of rights’ package released Tuesday, Romney said he wants to ‘rework’ the excise tax formula to encourage fuel economy. ... [T]he discount given to motorists who buy fuel-efficient cars could be offset by a higher charge for new gas-guzzlers, his campaign acknowledged.” (John Gregg, “Conserve Fuel, Get Tax Break,” *The MetroWest Daily News*, 9/6/02)

- **“During His Campaign For Governor, Mitt Romney Suggested Charging Higher Auto-Excise Taxes For Vehicles With Low Gas Mileage.”** (Editorial, “Hybrid Car Incentives,” *The Boston Globe*, 1/30/05)
- **“Romney, At Least, Owns Up To The Need For Specific Tax Increases – Excise Taxes On SUVs...”** (Steve Marantz, “Gov Hopefuls Baffle Voters With Fuzzy Details On Issues,” *Boston Herald*, 10/27/02)
- **“Recently Elected Republican Gov. Mitt Romney Of Massachusetts Wants To Peg The Excise Tax On Motor Vehicles To Fuel Efficiency...”** (Brad Knickerbocker, “Out Of Limelight, Environment Resonates As An Issue,” *The Christian Science Monitor*, 5/16/03)

In 2003, Romney Officials Said Governor “Plans To Push For A Higher Excise Tax On SUVs As Promised During The Fall Campaign.” “In addition to the policy on cars used by state employees, Romney plans to push for a higher excise tax on SUVs as promised during the fall campaign ... [Romney aide Douglas] Foy said.” (“State May Dump SUVs Because Of Budget Crunch,” *The Associated Press*, 1/23/03)

***The Boston Globe* Urged Romney To Make “A High Priority ... His Campaign Promise To Raise The Auto Excise Tax On Sport Utility Vehicles And Other Gas Guzzlers.”** “[O]ne [initiative] that deserves a high priority while the new governor still has a store of political capital is his campaign promise to raise the auto excise tax on sport utility vehicles and other gas guzzlers ...” (Editorial, “Curbing Gas Guzzlers,” *The Boston Globe*, 1/6/03)

Massachusetts Taxpayers Group: Romney Plan “Would Be A Tax Increase, And That Is Certainly Unacceptable”

“Barbara Anderson Of Citizens For Limited Taxation Opposes The Romney Plan On Both Practical And Conceptual Grounds.” (Editorial, “Curbing Gas Guzzlers,” *The Boston Globe*, 1/6/03)

- **Barbara Anderson, Citizens For Limited Taxation:** “[The Romney plan] would be a tax increase, and that is certainly unacceptable. ... I don’t think they have thought this through ... To penalize the rest of us because we are going to put our family safety ahead of an experimental (car) or environmental activism, then that would be wrong.” (John Gregg, “Conserve Fuel, Get Tax Break,” *The MetroWest Daily News*, 9/6/02)
- **Anderson:** “It annoys me especially when rich people who can afford to have more than one car tell me who can only afford one car what I should have ...” (Editorial, “Curbing Gas Guzzlers,” *The Boston Globe*, 1/6/03)

Democrat State Senator: “It’s A Good Democratic Idea”

Democrat State Senator Praised Romney Plan As “Sensible,” “A Good Democratic Idea.” “The Romney plan was also declared ‘sensible’ by state Sen. David Magnani, the Framingham Democrat who previously proposed a similar plan geared to the sales tax. ‘Conceptually, it makes a lot of sense. It’s a good Democratic idea, a good environmental idea,’ said Magnani...” (John Gregg, “Conserve Fuel, Get Tax Break,” *The MetroWest Daily News*, 9/6/02)

As Governor, Romney Discouraged State Agencies From Using SUVs, Implemented Strict Purchasing Requirements

To Increase Fuel Efficiency, Romney Administration Directed State Agencies To Only Use SUVs And 4x4s When “Absolutely Necessary” And “Required” State To Purchase Most Fuel Efficient Vehicles. “To increase fuel efficiency ... agencies are expected to limit 4-wheel drive vehicles to those absolutely necessary for emergency or off-road response, and to consider smaller, lower powered passenger vehicles or light-duty pick-up trucks in lieu of SUVs, large passenger vehicles, and large trucks. ... All agencies will be required to purchase the most economical, fuel efficient and low-emission vehicles appropriate to the mission. Unless a need is clearly demonstrated otherwise, the goal will be to have all new vehicles achieve a minimum of 20 mpg (estimated city) and to be Ultra Low Emission Vehicles (ULEV) or better.” (Administrative Bulletin, Executive Office for Administration and Finance, Commonwealth of Massachusetts, 12/1/03)

Romney Administration Required Agencies To Demonstrate Need For “Off-Road Capacity” Or “All-Weather Emergency Response” To Justify SUV Purchase. “[I]n order for an agency to purchase a state owned SUV or 4x4 truck, the need to have either off-road capacity or all-weather emergency response must be demonstrated. Specifically, the desire for non-emergency personnel to drive in inclement weather will no longer be justification for the purchase of a 4x4 vehicle.” (Administrative Bulletin, Executive Office for Administration and Finance, Commonwealth of Massachusetts, 12/1/03)

In 2005, Romney Dramatically Lamented Lack Of Progress On Fuel Efficiency – Then Just Hours Later Said He Did Not Support Tougher Fuel Efficiency Standards

In 2005, Romney “Issued His Own Call For Conservation” Saying “We’re Going To Have To Rethink How We Use Energy In Our Society.” “After introducing the new commissioner of the Department of Conservation and Recreation, Romney launched into a wide-ranging discourse on the nation’s energy challenges. Romney joked about a cardigan-clad President Carter exhorting Americans to turn down their thermostats during the

energy crisis of the 1970s. But then Romney issued his own call for conservation, saying 'we're going to have to rethink how we use energy in our society.'" (Scott Greenberger "Lawmaker Proposes Gas Tax Waiver," *The Boston Globe*, 9/2/05)

- **Romney:** "[W]e're going to have to rethink how we use energy in our society. ... It's an amazing fact. You've seen that almost everything in America has gotten more efficient over the decade except the fuel economy of the vehicles we drive, that's become more inefficient.'" (Scott Greenberger "Lawmaker Proposes Gas Tax Waiver," *The Boston Globe*, 9/2/05)

Later That Day, Romney Said He "He Did Not Necessarily Support" Tougher Fuel-Efficiency Standards, Saying Market Forces Would Curb Popularity Of SUVs. "Romney ... appeared to be departing from the conservative Republican position that the best way to reduce the price of oil is to find more of it. But later in the day, the possible presidential candidate emphasized that he did not necessarily support tougher fuel-efficiency standards. ... Romney predicted that simple economics will curb the popularity of sport utility vehicles and other gas-guzzlers." (Scott Greenberger "Lawmaker Proposes Gas Tax Waiver," *The Boston Globe*, 9/2/05)

Today, Romney Campaign Claims He Opposes CAFE Standard Increase "On Its Own"

Romney "Playing It Safe" On CAFE Standard Increase. "Romney, at least for now, is playing it safe on the issue. A spokesman said Romney opposes a CAFE standard increase on its own, but he left open the possibility that Romney would support an increase as part of a broader energy plan." (Scott Helman, "For Mitt Romney, Son Of The Man Said To Have Coined 'Gas-Guzzling Dinosaur,' His Stance On Fuel Economy Could Be Crucial," *The Boston Globe*, 1/28/07)

- **Romney Spokesman Kevin Madden:** "Governor Romney believes it would be unwise to arbitrarily increase CAFE standards outside the context of a comprehensive solution to reduce our dependence on foreign oil ..." (Scott Helman, "For Mitt Romney, Son Of The Man Said To Have Coined 'Gas-Guzzling Dinosaur,' His Stance On Fuel Economy Could Be Crucial," *The Boston Globe*, 1/28/07)

Romney Was Open To Raising Federal Gas In 2003 And Has Not Ruled It Out In Future – His Top Economic Adviser Is On The Record Supporting Tax Increase Of \$1 Per Gallon

In 2003, Romney Said He Was Open To Federal Increase In Gas Tax. "Governor Mitt Romney refused yesterday to endorse tax cuts at the heart of President Bush's economic program, but he told members of the state's congressional delegation during a private meeting he also would not oppose the cuts because he has to maintain 'a solid relationship' with the White House. ... In addition to refusing to endorse the president's tax cut, the governor surprised several people at the meeting by saying he is open to a federal increase in gas taxes." (Wayne Washington and Glen Johnson, "Romney Weighs In – Carefully – On Bush Tax-Cut Plan," *The Boston Globe*, 4/11/03)

- **Rep. Michael Capuano (D-MA):** "My memory is that [Romney] supported an increase in the (federal) gas tax and he wouldn't take a position on Bush's proposed tax cuts ..." (Casey Ross, *Boston Herald's Daily Briefing Blog*, "Romney Faces Questions On Tax Stance," www.bostonherald.com, 2/7/07)

 **Romney Has Refused To Rule Out Raising The Federal Gas Tax – As His Senior Economic Advisor Advocates – Only Saying It Would Not Be "Politically Acceptable."** CNBC's LARRY KUDLOW: "One of your senior economic advisers, Greg Mankiw from Harvard University, former President Bush economic adviser, he is pushing very hard for a \$1 increase in the gasoline tax. Since he's close to you, would you go for a \$1 rise in the gas tax nationwide?" ROMNEY: "Well, I think that would terrify everybody in the whole country. A gas tax of that nature, I think that's not something that's going to be politically acceptable to the American people." (CNBC's "Kudlow & Company," 2/7/07)

Romney Senior Advisor Greg Mankiw: "I Would Like To See Congress Increase The Gas Tax By \$1 Per Gallon, Phased In Gradually By 10 Cents Per Year Over The Next Decade." (N. Gregory Mankiw, Op-Ed, "Raise The Gas Tax," *Wall Street Journal*, 10/20/06)

Romney Has Not Ruled Out Carbon Tax If Elected President

 **Romney Refused To Rule Out Carbon Tax, Saying He Doesn't "Close Off Inquiry And Discussion."** CNBC's LARRY KUDLOW: "[D]o you favor carbon caps? Do you favor carbon taxes?" ROMNEY: "Well at this stage, we're going to look at what's the best way to incentivize more efficient use of energy. ..." KUDLOW: "So, as I hear it, you're leaving the door open to possible carbon cap or carbon tax?" ROMNEY: "Oh, I'm not a man that favors taxes, and so I'm not going to -- I'm not going to make a statement of that nature. But I can tell you that, you know, I don't close off inquiry and discussion on a lot of topics and I'm willing to talk to people about their

perspectives, but taxes and gas taxes are not something that I'd normally be inclined to." (CNBC's "Kudlow & Company," 2/7/07)

U.S. News & World Report's James Pethokoukis: "[Romney] was, you know, certainly leaving himself a little room, you know, with the carbon [tax] issue because he's – I'm sure they're not quite sure how they're going to – how they're going to fix that." (CNBC's "Kudlow & Company," 2/7/07)

Forbes Magazine's Quentin Hardy: "Carbon caps, he's for them, he just wants them market oriented. ... This guy actually likes a lot of government intervention, clearly." (CNBC's "Kudlow & Company," 2/7/07)

In April 2007, Romney Praised France's Energy Policies And Noted Hitler's Use Of Liquefied Coal

Romney Said U.S. Would Need France's Help To Build Nuclear Power Plant And Noted Hitler Used Liquefied Coal "I Guess Because He Was Concerned About Losing His Oil." "I'm afraid building a nuclear power plant in our country today would require us first to hire the French to show us how to do it because they've been building 'em and we haven't," Mr. Romney said in response to a question about energy policy during his talk, as captured on video by the Washington Post's politics Web log. So far, so good. But he kept going. 'Liquefied coal, gosh. Hitler during the Second World War – I guess because he was concerned about losing his oil – liquefied coal. That technology is still there.'" (Ryan Sager, "Romney's Energy Gaffe," *The New York Sun*, 4/20/07)

CAPE WIND RENEWABLE ENERGY PROJECT

Romney And Sen. Ted Kennedy Were Leading Opponents Of Cape Wind Project In Nantucket Sound

Romney Teamed With Ted Kennedy – Whose Family Compound Has View Of Proposed Wind Farm Site – To Oppose Cape Wind Project. "[G]overnor Romney, a Republican, has sided with U.S. Sen. Edward M. Kennedy, a Democrat, in opposition to the project. The Kennedy family's Hyannisport compound has a view of the proposed site." (Rachel Lane, "Cape Project May Set Precedent For Offshore Wind Power," *The Providence Journal*, 8/14/05)

- **"Governor Mitt Romney And Senator Edward M. Kennedy Oppose The Project, Although Both Say They Are In Favor Of Wind Power."** (Beth Daley, "EPA Deals Setback To Wind Farm Plan," *The Boston Globe*, 2/26/05)
- **"Romney Has Been A Leading Opponent Of The Wind Farm ..."** (Stephanie Ebbert, "Cape Wind Is Dealt A Setback," *The Boston Globe*, 4/7/06)
- ***The Associated Press* Refers To Romney As "A Longtime Wind Farm Opponent."** (Andrew Miga, "Wind Farm Developers Press Forward," *The Associated Press*, 7/3/06)
- **Romney Said He Would "Use Every Tool At His Disposal" To Kill Cape Wind.** "Governor Mitt Romney has publicly opposed Cape Wind, proclaiming himself ready to do so using every tool at his disposal." (Editorial, "Wind Power With No Direction," *The Boston Globe*, 2/27/06)

In 2006, Kennedy Worked To Give Romney Veto Power Over Cape Wind Project. "Earlier this year, Cape Wind foes, including Sen. Edward Kennedy, D-Mass., wanted to hand veto power over the project to Gov. Mitt Romney, a longtime wind farm opponent, or his successor. Such a move could have doomed the project. The move stirred controversy and stalled the popular Coast Guard money bill. Cape Wind backers branded it a back-door deal to kill the project. Kennedy and other lawmakers eventually dropped their veto demands, clearing the way for a compromise giving the Coast Guard, not Romney or his successor, a central role in approving the project." (Andrew Miga, "Wind Farm Developers Press Forward," *The Associated Press*, 7/3/06)

Columnist Robert Novak: Kennedy And Romney Joined To Try To Kill Cape Wind, Which Is Also Opposed By Wealthy Egan Family, "Who Have Been Generous In Political Contributions" To Romney. "Rich oceanfront residents of Cape Cod do not want their view of Nantucket Sound faintly obstructed by offshore protrusions of a proposed wind farm. So, they have hired lobbyists to kill Cape Wind, a project providing an environmentally sound source of energy. Their most important ally in this venture is a fellow wealthy Cape Cod landowner, Sen. Edward M. Kennedy. Opposition to America's first offshore wind farm seems a peculiar posture for the liberal lion of the Senate. The self-indulgent squires of Cape Cod likewise seem a strange set of friends for Teddy Kennedy. He is also joined in opposition by Massachusetts Gov. Mitt Romney, a Republican presidential prospect. ... The Kennedy neighbors on Cape Cod have traditionally opposed the Kennedys politically, but they are all in bed together in opposing Cape Wind. That includes the Egan family, owners of EMC Corp. who have

been generous in political contributions to Republicans, notably Romney.” (Robert Novak, Op-Ed, “Looking In Vane For Consistency,” *Chicago Sun-Times*, 5/4/06)

The Washington Times Blasted Romney For Opposing Cape Wind

The Washington Times: Romney’s Opposition To Cape Wind Sends “The Unmistakable Signal That He Is More Beholden To His Wealthy Political Benefactors And The Past Than He Is To Middle-Class Energy Consumers And The Future.” “With oil prices currently approaching \$70 per barrel and natural gas prices reaching once-incomprehensible heights in December, energy policy will continue to be a major concern for America’s consumers, voters and politicians. Massachusetts Republican Gov. Mitt Romney, who considers himself to be presidential timber, has a golden opportunity to distinguish himself as an environmentally friendly, consumer-oriented, technologically savvy problem solver. However, to hit this win-win-win trifecta, Mr. Romney will have to change his mind. That will require him to abandon his unaffordable, outdated, self-serving NIMBY instincts. Otherwise, this former venture capitalist will send the unmistakable signal that he is more beholden to his wealthy political benefactors and the past than he is to middle-class energy consumers and the future.” (Editorial, “Not-So-Consumer-Friendly Romney,” *The Washington Times*, 4/14/06)

The Times Cites Major Romney Fundraiser’s Opposition To Cape Wind, Calls His Analogy With Wind Farm In Grand Canyon “Absurd.” “As it happens, the Cape Wind views of the self-styled gubernatorial technophile mirror the positions of the billionaire Egan family, which has been a principal fund-raiser for the governor. As Boston Globe columnist Joan Vennochi reported in December 2004, Jack and Michael Egan were directors of the Alliance to Protect Nantucket Sound, which spent \$2.4 million opposing Cape Wind. Michael Egan and the Egan Family Trust own mansions overlooking Nantucket Sound. Arguing that his opposition stems from the wind farm’s perceived impact on tourism, Mr. Romney denies his Cape Wind position is influenced by the Egan family. Instead, his office offers the absurd comparison that he would also oppose ‘putting a wind farm in the middle of the Grand Canyon or at the foot of Mount Rushmore.’” (Editorial, “Not-So-Consumer-Friendly Romney,” *The Washington Times*, 4/14/06)

- **“The People Of Massachusetts Want Him To Lead The Way, But He Seems Anchored To The Irresponsible NIMBY Policies Of The Past.”** “The people of Massachusetts want him to lead the way, but he seems anchored to the irresponsible NIMBY policies of the past. Indeed, a statewide survey recently conducted by the University of New Hampshire and the University of Massachusetts revealed that Massachusetts residents supported the Cape Wind project by 64 percent to 10 percent, with 26 percent undecided. Among all options, offshore wind-generated energy received the greatest amount of support among Massachusetts residents, even more than solar power. Even if Mr. Romney doesn’t get it, it is clear that the vast majority of his non-fund-raising constituents do.” (Editorial, “Not-So-Consumer-Friendly Romney,” *The Washington Times*, 4/14/06)
- **Romney’s Opposition To Cape Wind “Is Not The Way Any Republican Should Begin A Presidential Campaign.”** “In November, the man [Romney] who opposes Cape Wind had the nerve to declare that ‘clean-energy technologies will reduce our dependence on foreign oil, air pollution and long-term energy costs.’ He should have added: ‘Provided that those clean-energy technologies are “Not In My Back Yard” or in the front yard of my fund-raisers.’ In the midst of an energy crisis, this is not the way any Republican should begin a presidential campaign.” (Editorial, “Not-So-Consumer-Friendly Romney,” *The Washington Times*, 4/14/06)

Romney Says He Supports Renewable Energy, But Opposes Cape Wind

Romney Said He Opposed Project “Due To The Visual Impact.” ROMNEY: “I’m enthusiastic about renewables, I’m enthusiastic about wind, about solar cells and new technology, but I don’t think that the location in Nantucket Sound is the right place for a major project of the nature that has been proposed due to the visual impact ...” (Jack Coleman, “Massachusetts Governor Urges Use Of Alternative Energy,” *Cape Cod Times*, 3/14/03)

- **Romney:** “I wouldn’t want in any way to try and prevent the development and expansion of wind technology ... But I would, however, not want to see wind technology employed in a highly visually impactful way in Nantucket Sound.” (Jack Coleman, “Massachusetts Governor Urges Use Of Alternative Energy,” *Cape Cod Times*, 3/14/03)

Romney: “I Don’t Like The Project At All.” (Jon Keller, “Passions Running High In Wind Farm Debate,” WBZ-TV Boston, www.wbztv.com, 4/24/06)

Romney: “I Love Wind Technology ... From A Visual Standpoint It’s Just The Wrong Place To Put A Project Like That.” ROMNEY: “I love wind technology. I’d love to see it used in Massachusetts. I’m just afraid

that in a place that is key to our tourism economy, and is a national treasure, from a visual standpoint it's just the wrong place to put a project like that ... It's a little bit like saying, "The Grand Canyon has great winds, let's put a windmill project in the Grand Canyon." (Jack Coleman, "Massachusetts Governor Urges Use Of Alternative Energy," *Cape Cod Times*, 3/14/03)

Romney: "This Is The Wrong Place For A Wind Farm." ROMNEY: "I want more wind power in the commonwealth. I'd like to see it on other places in our coast and in our land ... But I think in this particular area, surrounded by state waters and as a tourism treasure for the commonwealth and the nation, this is the wrong place for a wind farm." (Elizabeth Mehren, "Cape Cod Wind Farm Project May Be Headed For Pasture," *Los Angeles Times*, 5/5/06)

Romney Aide Shawn Feddeman: Romney "Absolutely Does Not Support" Cape Wind Project. "He has been consistent in that he supports looking at alternative energy sources, but this is something he absolutely does not support ..." (Donna Goodison, "Wind Farm Opposition Is Shared By Romney," *Boston Herald*, 2/28/03)

Renewable Energy Advocates Said Congressional Effort To Block Cape Wind Could Harm Wind Power Development For Decades

Renewable Energy Advocates Said Romney-Backed Congressional Effort To Block Cape Wind Was Threat To Wind Power Development, "Perhaps Setting Back New Projects As Much As A Generation." "A Coast Guard reauthorization bill that would block construction of the nation's first offshore wind farm is being viewed by industry officials, financial backers and renewable energy advocates as a threat to other wind-generation projects in coastal waters. Conferees on the legislation (HR 889) added language to a conference report agreed to April 6 that would allow the governor of Massachusetts to veto the Cape Wind project planned for Nantucket Sound. Although the provision would apply only to the Massachusetts project, it could have a 'very strong adverse effect on the offshore wind industry,' perhaps setting back new projects as much as a generation, said Theodore Roosevelt IV, a managing director at Lehman Brothers, which is spearheading the Cape Wind financing effort. 'Going forward, if someone approaches us about an offshore wind project, we're going to be deeply skeptical about taking it on because we can't understand the risk,' Roosevelt said." (Kathleen Hunter, "Opposition To Cape Cod Project Seen As Threat To Wind Power Development," *Congressional Quarterly Today*, 4/21/06)

EDUCATION

Romney Supports No Child Left Behind Act, Raises Concerns Over Specific Testing Processes

Romney Supports No Child Left Behind Act. "Massachusetts has not been impacted by the federal No Child Left Behind law because it was testing public school students before it was enacted, Gov. Mitt Romney said Thursday, but he supports it because such measurement is necessary to improve schools." ("Romney Applauds Student Measurement In No Child Left Behind," *The Associated Press*, 8/31/06)

Romney Said Measurement Standards In NCLB "Have A Long Way To Be Perfected" But Backed Concept Of Measuring Student Progress. "We all want to be successful based on our rhetoric, not actual, measurable results, and I'm afraid that in the world marketplace, our kids are only going to be successful based on their performance, and that requires measurement. ... I think the president was right to insist on measurement. I think the measurements themselves have a long way to be perfected, and a lot of room for improvement." ("Romney Applauds Student Measurement In No Child Left Behind," *The Associated Press*, 8/31/06)

Despite His Campaign Trail Claims, Standardized Testing Started A Decade Before Romney Took Office

Romney, In 2007: "We Set Standards. We Have A Graduation Exam To Get Out Of High School You've Got To Pass..." (O. Kay Henderson, "Romney Calls For End To Bilingual Education," *Radio Iowa*, 1/26/07)

Massachusetts' MCAS Exam For Public School Students Has Existed Since 1993. "The Massachusetts Comprehensive Assessment System (MCAS) was implemented in response to the Education Reform Law of 1993, which required that MCAS be designed to: Test all public school students across the Commonwealth, including students with disabilities and students with limited English proficiency ..." (Massachusetts Department Of Education Website, www.doe.mass.edu, Accessed 1/26/07)

As Candidate For Governor, Romney Didn't Know Vital Details Of State's Testing System

In 2002, Romney Didn't Know What MCAS Acronym Stood For. "Romney, 55, said he planned to continue Swift's support of Education Reform, the 1993 state law meant to boost spending in the state's poorest schools,

and the MCAS exam, the standardized test state officials use to make sure that money is getting results. 'I believe that the MCAS is a system that is working for the children of Massachusetts,' Romney volunteered. But when asked what the letters 'MCAS' stand for, Romney made his first campaign-trail stumble. 'I can't repeat them for you right now, thank you, but it's for the kids who are getting ready to graduate this year,' he said." (John McElhenny, "Romney, Swift Show Republican Unity," *The Associated Press*, 3/20/02)

Romney Also Didn't Know When State's MCAS Testing Standards Took Effect. "In fact, students graduating this year don't have to pass the MCAS exam, which stands for the Massachusetts Comprehensive Assessment System. Students graduating next year are the first who must pass to graduate." (John McElhenny, "Romney, Swift Show Republican Unity," *The Associated Press*, 3/20/02)

Romney Boasts Of Supporting Charter Schools Yet Failed To Meet With School Choice Advocates While In Office

On Campaign Trail, Romney Recounts Growth In Charter Schools During His Term As Governor. "On education, Romney boasted of student performance on federal testing on English and math, growth of charter schools, state funded college scholarships and approval of a ballot initiative that ended bilingual education." (Todd Dvorak, "Romney Touts Conservative Views In Waterloo," *The Associated Press*, 1/26/07)

- **"[Romney] Told The Crowd That He Favors The Establishment Of Charter Schools."** (Jim Davenport, "Romney Pushes Married Family Involvement In Education," *The Associated Press*, 2/23/07)

Head Of Massachusetts Charter School Association Says He Was Unable To Get A Single Meeting With Romney In Four Years. "Even his local supporters are cringing. Few issues are as important as school choice but Marc Kenen, head of the Massachusetts Charter School Association, wasn't able to get a single meeting with the governor in four years. 'We never had an opportunity to sit down with him, we never had a one-on-one conversation,' Kenen said. 'He wasn't the most accessible guy.'" (Brett Arends, Op-Ed, "Mitt Shoots Holes In His Credibility," *The Boston Herald*, 4/11/07)

Romney Endorsed Vouchers For Private Schools In 1994 But Opposed Them In 2002

Romney Came Out Against School Vouchers In 2002 After Favoring Them In 1994. "During their Tuesday night debate at WPI, Ms. O'Brien and Mr. Romney said they oppose vouchers for private schools. ... Romney campaigned in favor of vouchers when he ran against U.S. Sen. Edward M. Kennedy, D-Mass., in 1994." (Richard Nangle, "Bilingual Ed Produces Stark Divide," *Sunday Telegram [MA]*, 10/6/02)

2002: Romney Said Vouchers Were "Not A Good Idea For Massachusetts." "In a statement, Mr. Romney said 'vouchers are not part of my plan to improve the quality of education for our students, and they are not a good idea for Massachusetts.'" (Richard Nangle, "Bilingual Ed Produces Stark Divide," *Sunday Telegram [MA]*, 10/6/02)

As Gubernatorial Candidate, Romney Opposed Abstinence-Only Education Programs, Later Changing His Position

2002: Romney Told Reporters He Supported Sex Education In Public Schools And Opposed Abstinence-Only Programs. "Yesterday, Romney also aimed to head off confusion about his stance on abortion rights by answering a Mass National Abortion and Reproductive Rights Action League questionnaire with mostly abortion-rights positions. ... Romney said that he would oppose any abortion restrictions, such as mandated waiting periods or religion-based counseling and that he supports sex education in public schools and opposes abstinence-only programs." (Stephanie Ebbert, "Romney Pushes Education At Campaign Stop," *The Boston Globe*, 4/10/02)

- **Pro-Choice Activists Say Romney Promised To Fight Efforts To Promote Abstinence-Only Education.** "Running for governor, Romney told [Deborah] Allen and other officers of NARAL Pro-Choice Massachusetts that he would steadfastly support abortion rights. ... Romney promised to fight efforts by some conservatives to require abstinence-only sex education in schools, rather than courses that mention condoms and other forms of contraception." (Peter Wallsten, "Activists Remember A Different Romney," *Los Angeles Times*, 3/25/07)

In 2005, Romney Unsuccessfully Tried To Steer \$740,000 Federal Sex Ed Grant Into Classrooms Rather Than Advertising. "Earlier this month he tried, unsuccessfully, to persuade the Legislature to use a \$740,000 federal sex education grant to teach abstinence in schools, rather than continue the current practice of spending it on television commercials and ads on subways and buses." (Scott S. Greenberger, "Roe V. Wade Omitted From Proclamation," *The Boston Globe*, 3/25/05)

- **Romney Continued To Support Comprehensive Sex Education With Abstinence Emphasis.** “[Romney aide Eric Fehrstrom] said Romney supports ‘comprehensive sex education with an emphasis on abstinence as the safest and healthiest choice for our young people,’ and that the criticism from Planned Parenthood and NARAL is politically motivated.” (Scott S. Greenberger, “Roe V. Wade Omitted From Proclamation,” *The Boston Globe*, 3/25/05)

In 2002, Romney Initially Refused To Back Ballot Initiative Mandating English Immersion Instead Of Bilingual Education Before Switching Positions

In April 2002, Romney Opposed Ballot Initiative Replacing Bilingual Education With English Immersion, A Measure His Spokesman Said Went “Too Far.” “GOP lieutenant governor hopeful James Rappaport, in a sharp-right break from ticket-topper Mitt Romney, has signed a no-new-tax pledge and is embracing a bid to dismantle the state’s bilingual education law. ... Rappaport will join local leaders of the English for Children of Massachusetts campaign to endorse their controversial ballot initiative. ... Romney has carefully sought to appeal to moderate and Democrat voters and opposes the ballot question. ‘Mitt Romney is not happy with the status quo with regard to bilingual education but he thinks the Unz ballot question goes too far,’ said Romney deputy campaign manager Eric Fehrstrom.” (David R. Guarino and Joe Battenfeld, “Rappaport, In Break With Romney, Inks No-New-Tax Pledge,” *The Boston Herald*, 4/10/02)

- **Initiative Required Rapid, Yearlong Language Immersion For All Non-Fluent Children.** “The proposal, backed by Silicon Valley millionaire Ron Unz, would force all children not fluent in English to learn it within a year. Current state law allows for a three-year introduction to English.” (David R. Guarino and Joe Battenfeld, “Rappaport, In Break With Romney, Inks No-New-Tax Pledge,” *The Boston Herald*, 4/10/02)
- **Investor’s Business Daily:** “[The ballot initiative] would replace the state’s bilingual ed with a one-year program of English immersion. Early polling shows it running well ahead. Yet the GOP’s nominee for governor, Mitt Romney, opposes it.” (Tom Gray, “Schools’ Bilingual Ed Failures Push States To Seek Reforms,” *Investor’s Business Daily*, 5/29/02)

Less Than Two Months Later, Romney Reversed His Position And Endorsed The Ballot Initiative. “Republican gubernatorial candidate Mitt Romney is endorsing a California millionaire’s proposal to replace Massachusetts’ three-year bilingual education system with a one-year “English immersion” program for children not fluent in the language.” (John McElhenny, “Mitt Romney Endorses ‘English Immersion’ Education Plan,” *The Associated Press*, 6/4/02)

- **“Politically, Supporting This [Initiative] Was Like Saying You Supported Baseball And Apple Pie, And The Poll Numbers Reflected This.”** (Owen Eagan, “Baseball, Apple Pie, And English,” *Campaigns & Elections*, 10/03)
- **Initiative Eventually Passed With 68% Of The Vote, Phasing Out Bilingual Education.** “The English immersion law, which calls for students with limited English skills to spend a year learning almost entirely in English before moving to mainstream classrooms, replaced bilingual education after 68 percent of voters approved the switch last November.” (Anand Vaishnav, “School Begins, Immersed In English Bilingual Education Ends Under Terms Of 2002 Vote,” *The Boston Globe*, 8/27/03)

Romney Eventually Made English Immersion A “Central Plank” Of His ‘02 Campaign, Spending More Than \$1 Million To Promote It. “Mitt Romney, the former Olympics chief and venture capitalist, adopted English immersion as a central plank in his campaign for governor. His support for immersion would be promoted in a constant drumbeat of campaign stump speeches, press events, automated phone calls to voters, and two separate TV spots that we estimated cost more than \$1 million.” (Owen Eagan, “Baseball, Apple Pie, And English,” *Campaigns & Elections*, 10/03)

- **While Endorsing Ballot Measure, Romney Said He Would Be “The First To Say ‘Stop’” If It Failed And Would Not Pursue Issue If Voters Rejected It.** “Republican Mitt Romney... said he supports the bilingual education initiative known as Question 2 that voters will decide on Nov. 5. ... Romney said that he opposes a part of the initiative that would allow parents to sue teachers and districts over immersion, and said he would be ‘the first to say “stop”’ if immersion didn’t work. He also said he would not pursue the issue if voters reject it in November.” (Theo Emery, “Hopefuls For Governor, Lieutenant Governor Hit The Road For Votes,” *The Associated Press*, 10/12/02)
- **Ballot Measure Passed With 68% Support.** “The English immersion law, which calls for students with limited English skills to spend a year learning almost entirely in English before moving to mainstream

classrooms, replaced bilingual education after 68 percent of voters approved the switch last November.” (Anand Vaishnav, “School Begins, Immersed In English Bilingual Education Ends Under Terms Of 2002 Vote,” *The Boston Globe*, 8/27/03)

In 2003, State Legislature Loosened The New Immersion Law And Overturned Romney’s Subsequent Veto. “About 68 percent of Massachusetts voters last year approved the ballot initiative, Question 2, which required that immigrant students be placed in all-English classes instead of bilingual programs. But the Legislature on Monday voted to exempt some provisions of the new law, including ‘two-way’ programs, a form of bilingual education in which students of different cultures learn each other’s languages simultaneously.” (Anand Vaishnav, “Romney Hits Softening Of Bilingual Law,” *The Boston Globe*, 7/16/03)

- **“Romney Vetoed The Legislature’s Exemption Of Two-Way Programs, But Both Houses Overrode Him...”** (Anand Vaishnav, “Romney Hits Softening Of Bilingual Law,” *The Boston Globe*, 7/16/03)

Romney Now Touts English Immersion Education On Presidential Campaign Trail. “Massachusetts Gov. Mitt Romney, campaigning for Iowa Republicans ... said that while the United States should embrace its diversity, all students should be immersed in the English language. ... Romney said he has been a proponent of ‘English immersion,’ in which a bilingual student is placed in a classroom where all materials, books and instruction are in English.” (Melissa Walker, “Schools Should Use English, Romney Says,” *Des Moines Register*, 8/26/06)

- **Romney: Kids “Need To Speak The Language Of This Country.”** “If kids in this country want to be successful in this country then they need to speak the language of this country. ... Republicans care about education. Democrats can’t do what needs to be done there. They are so wedded to the teachers union they can’t put kids first.” (Todd Dvorak, “Romney Touts Conservative Views In Waterloo,” *The Associated Press*, 1/26/07)

1994: As Senate Candidate, Romney Backed Eliminating Federal Department Of Education

Romney Said Education Should Be State And Local Issue, Called For Elimination Of U.S. Department Of Education. “When Romney ran for U.S. Senate in 1994, he called for the elimination of the U.S. Department of Education. He said there’s no contradiction in that stance and his new education proposal, because he has always believed education should be a local and state issue, not federal.” (John McElhenny, “Mitt Romney Endorses ‘English Immersion’ Education Plan,” *The Associated Press*, 6/4/02)

CRIME AND PUBLIC SAFETY

Romney Instituted “Top-To-Bottom” Corrections Reform Effort Early In His Term

In 2003, Romney Commissioned Former Democratic Gubernatorial Nominee And Ex-Attorney General Scott Harshbarger To Lead “Top-To-Bottom” Review Of State’s Correction System. NPR’s LYNN NEARY: “[T]wo months after the brutal murder of a defrocked priest in a maximum-security prison in Massachusetts, Governor Mitt Romney has ordered a top-to-bottom review of the state’s Department of Corrections. ... Republican Governor Mitt Romney has appointed Scott Harshbarger to lead a top-to-bottom review of the corrections system. Harshbarger is a Democrat and former state attorney general who says over the past 20 years the state paid less attention to corrections policies even as it worked effectively to reduce crime.” (NPR’s “Weekend Edition,” 11/1/03)

December 2003: Facing String Of Bad Press Coverage, Romney “Purged” State’s Correction And Public Safety Commissioners As Well As Chief Medical Examiner. “Facing daily reports of scandal and abuse in the prisons, medical examiner’s office and state licensing division, Gov. Mitt Romney yesterday purged three top public safety officials in the first major shakeup in his administration. The high-level officials swept out in the personnel changes have been struggling to dig out from a barrage of negative headlines and allegations of mismanagement.” (Steve Marantz, “Wipeout,” *Boston Herald*, 12/2/03)

- **Department Of Correction:** “Michael Maloney, commissioner of the Department of Correction ... was placed on medical leave in the wake of the brutal strangulation murder of defrocked priest John J. Geoghan, and is being replaced by Kathleen M. Dennehy, deputy commissioner. Administration officials would not disclose the nature of Maloney’s illness.” (Steve Marantz, “Wipeout,” *Boston Herald*, 12/2/03)
- **Office Of Public Safety:** “Commissioner of Public Safety Joseph Lalli ... will resign at the end of December as federal and state authorities probe the improper issuance of licenses for tradesmen and heavy equipment operators. No replacement has been named.” (Steve Marantz, “Wipeout,” *Boston Herald*, 12/2/03)

- **Chief Medical Examiner:** “Dr. Richard J. Evans, the chief medical examiner ... will be replaced amid revelations in Boston Herald of gross mismanagement. Romney will choose his successor from three candidates to be nominated by a 16-member commission activated yesterday.” (Steve Marantz, “Wipeout,” *Boston Herald*, 12/2/03)

Romney Aide: “The Governor Is Interested In A Fresh Start” On Public Safety Issues. “The governor is interested in a fresh start at (the Executive Office of Public Safety,)” said a senior aide who spoke on the condition of anonymity. The aide downplayed the personalities involved, saying, ‘These personnel moves should not reflect negatively on the people involved, rather, they indicate the governor’s prerogative to bring in his own team to manage critical public safety functions.’” (Steve Marantz, “Wipeout,” *Boston Herald*, 12/2/03)

Romney Had Been Under Fire For Mismanagement Of Prisons And Lax Oversight Of Sex Offenders. “Romney has come under fire from Democratic lawmakers for mismanagement of the prisons as well as the Sex Offender Registry Board, which is part of the Executive Office of Public Safety. A Herald-Fox 25 News investigation uncovered a failed system of monitoring sex offenders. In scores of cases, state records contained inaccurate information about the residential addresses and work locations of some of the most dangerous sex offenders after their release from prison.” (Steve Marantz, “Wipeout,” *Boston Herald*, 12/2/03)

After Romney Left Office, Top Public Safety Officials Were Dismissed Over Performance Issues, Admitted System Is Not Working Well

Weeks After Romney Left Office, Commissioner Kathleen Dennehy Admitted System Suffered From Overcrowded Prisons, Few Effective Rehabilitation Programs And Outdated Sentencing Policies. “Outdated sentencing policies and a lack of effective rehabilitation programs are forcing inmates unprepared for civilian life into Massachusetts communities, corrections experts warned at Harvard University’s Kennedy School of Government last night. The commonwealth’s prisons are overcrowded and cannot accept inmates at the current rate, Department of Correction Commissioner Kathleen Dennehy [said] ... ‘Until we address our sentencing practices, we are going to be in a box of increasing incarceration rates,’ she said.” (Emily Shields, “Criminal Justice Officials Speak At Harvard On Prison Sentencing Reform,” *The [Boston University] Daily Free Press*, 2/28/07)

- **Dennehy:** “Prisons are starting to look more like hospital wards than institutions for punishment and rehabilitation.” (Emily Shields, “Criminal Justice Officials Speak At Harvard On Prison Sentencing Reform,” *The [Boston University] Daily Free Press*, 2/28/07)

In 2007, Romney’s Handpicked Correction Commissioner Was Asked To Resign Amid Loss Of Confidence By New Governor, Prison Employees

In April 2007, Romney’s Successor Asked “Controversial” Correction Commissioner Kathleen Dennehy To Resign. “Correction Commissioner Kathleen M. Dennehy, who was appointed to overhaul the state’s prison system after the slaying of incarcerated priest John Geoghan, has been asked to leave her post by the Patrick administration, according to administration sources. ... Since Governor Mitt Romney appointed Dennehy in March 2004, she has been a controversial figure. ... [S]he inspired optimism among reform activists who believed she would bring a new openness and crack down on alleged abuse by guards. But she quickly fell out of favor with the union, which accused her of initiating policies that made the job of correction officers more dangerous.” (Andrea Estes, “Prison Chief Stepping Down,” *The Boston Globe*, 4/18/07)

Massachusetts Correction Officers Federated Union’s Steve Kenneway Said Dennehy’s Weak Positions When It Came To Assaults On Guards Led To Loss Of Confidence In Her Leadership. “[Kenneway] said two policies in particular turned the union against her. After an inmate was beaten by guards, Dennehy changed the department’s use-of-force policy, so that an officer who is provoked must stop before acting to consider what a neutral person would find a reasonable response. Kenneway said that Dennehy has also downplayed the seriousness of assaults on officers and failed to press for the prosecution of prisoners who attack guards.” (Andrea Estes, “Prison Chief Stepping Down,” *The Boston Globe*, 4/18/07)

- **Kenneway: Dennehy “Changed Policies That We Believe Will End Up Getting An Officer Killed.”** “Her management style has been nothing but abrasive ... Under her leadership, she has alienated the officers and changed policies that we believe will end up getting an officer killed. Morale has never been lower.” (Andrea Estes, “Prison Chief Stepping Down,” *The Boston Globe*, 4/18/07)

- **Kenneway Noted New Limits On How Guards Can React When Provoked And Study Showing “Serious Shortcomings” In State’s Handling Of At-Risk Inmates.** “Kenneway pointed to a change in the use-of-force policy, which put new limits on what actions guards could take when provoked, and what he saw as her reluctance to push for prosecution of inmates who assault guards. The system has also seen a sharp rise in suicides on Dennehy’s watch, leading her to call for a study that recently highlighted serious shortcomings in the state’s handling of at-risk inmates.” (Andrea Estes, “Prison Chief Stepping Down,” *The Boston Globe*, 4/18/07)

Romney Appointed Dennehy In December 2003 After Prison Slaying Of Abusive Priest John Geoghan By Another Inmate. “Romney appointed Dennehy as acting commissioner in December 2003 to replace Michael T. Maloney. He was ousted four months after Geoghan, a dismissed priest whose abuse of young boys helped trigger the clergy sexual abuse scandal, was killed in his prison cell by another inmate. Dennehy was officially appointed to the post three months later.” (Andrea Estes, “Prison Chief Stepping Down,” *The Boston Globe*, 4/18/07)

State Rep. Kay Khan (D) Said Dennehy Was “Confined” By Romney Administration. “State Representative Kay Khan, Democrat of Newton, who has worked on correction issues for more than a decade, said Dennehy tried to make changes but was met with resistance from the former administration. ‘Her heart and mind have always been in the right place, though she’s often been confined I believe by the Republican administration. She’s had to be cautious about how far she’s willing to go,’ said Khan.” (Andrea Estes, “Prison Chief Stepping Down,” *The Boston Globe*, 4/18/07)

STATE PRISON SYSTEM

Assessments Of Massachusetts Prison System Revealed Array Of Internal Problems

Prisoners “Routinely Being Released Into Cities And Towns With Highly Infectious Diseases ... Because Of Woeful Medical Care Behind Bars.” “2005 assessment of the Romney administration’s overall progress on prison reform assigns a ‘D’ to its improvements in health care since June 2004. Massachusetts prisoners are routinely being released into cities and towns with highly infectious diseases – among them tuberculosis, skin lesions, hepatitis C and HIV – because of woeful medical care behind bars.” (Michelle McPhee, “Say It Ain’t Mitt-Mo,” *Boston Herald*, 4/21/06)

- **System Had Inadequate Treatment Facilities For Inmates With Infectious Diseases.** “According to a 2003 study from the Massachusetts Public Health Association, a third of the inmates entering the DOC system had hepatitis C. The entire system had just 55 treatment slots for the highly contagious disease.” (Michelle McPhee, “Say It Ain’t Mitt-Mo,” *Boston Herald*, 4/21/06)

Twenty Prison Guards Were Paid Over \$270,000 In Salary While On Forced Leave After Allegations Of Impropriety. “Some \$270,000 in taxpayer-funded salaries are being paid to 20 prison guards or Department of Correction civilian staff who are on leave while being probed for prisoner abuse, criminal charges such as rape and domestic violence and other incidents.” (Michelle McPhee, “Say It Ain’t Mitt-Mo,” *Boston Herald*, 4/21/06)

Guards Filed Over 30 Complaints Regarding Malfunctioning Cell Doors Before Several High-Risk Prisoners Escaped From Cells At Walpole, MA Prison When Doors Failed. “In 2005, several of the state’s most dangerous cons escaped their cells at MCI-Walpole’s Disciplinary Disorder Unit after electronic doors malfunctioned. In one case a prisoner left his cell and went on a rampage, breaking windows and passing out razors to other inmates. Prison guards filed 34 complaints about the faulty doors before the DOC shut down the unit for repairs in July. The unit remains closed.” (Michelle McPhee, “Say It Ain’t Mitt-Mo,” *Boston Herald*, 4/21/06)

Lost Security Video May Have Warned Of Impending Jailhouse Murder. “Pedophile priest John J. Geoghan murdered Aug. 23, 2003, by a fellow inmate, a slaying that his killer, Joe Druce, pantomimed on a security video that DOC officials were unable to locate.” (Michelle McPhee, “Say It Ain’t Mitt-Mo,” *Boston Herald*, 4/21/06)

Guards Complained About Dangerous Staffing Conditions In One Prison Where Female Counselor Was Attacked By Sexual Predator. “In December, a convicted sexual predator attacked a female counselor at MCI-Gardner, a prison plagued with problems because of low staffing levels. Guards have written more than two dozen reports about dangerous conditions in the prison.” (Michelle McPhee, “Say It Ain’t Mitt-Mo,” *Boston Herald*, 4/21/06)

Romney Efforts At Reforming Prison System Failed, Commissioner Fired By Successor

Romney's Handpicked Correction Commissioner Kathleen Dennehy Forced Out By New Governor "Under A Cloud." "Outgoing Correction commissioner Kathleen Dennehy confronted a culture of secrecy, tolerance of inmate abuse, and rigidity when she took control of the state prison system in 2003 after the ouster of her predecessor by then-Governor Romney. But now it is the reform-minded Dennehy who is under a cloud, and who has been asked to leave her post by Governor Patrick, raising questions about what kind of leader is needed next at the Department of Correction." (Editorial, "Hard Time For State Prisons," *The Boston Globe*, 4/24/07)

Globe Editorial: Romney's Appointee Couldn't "Make A Clean Break From The Correction Culture In Which She Rose." "On paper, Dennehy seemed the right person to lead the department. ... But the 31-year employee of the department could never fully make a clean break from the Correction culture in which she rose. She speaks convincingly of the need for transparency and accountability. But murkiness still remains, including in the important area of prisoner classification." (Editorial, "Hard Time For State Prisons," *The Boston Globe*, 4/24/07)

Romney Advisory Council On State Prisons Fell Apart In 2005 As Members Claimed Romney Lacked Commitment

Four Members Of Romney's Advisory Council On Prisons Resigned Their Seats, Charging Romney Was Not Committed And Didn't Attend Meetings. "[S]tate Sen. Jarrett T. Barrios (D-Cambridge), who quit Romney's DOC Advisory Council last year citing Romney's inaction on its proposals, said the state's troubled system is no model ... Romney formed the council after the 2003 murder of defrocked priest John Geoghan by a fellow inmate. Four members have quit, saying Romney was not committed to change and did not attend a single meeting." (Michelle McPhee, "Say It Ain't Mitt-Mo," *Boston Herald*, 4/21/06)

April 2006: Romney Toured Guantanamo Bay Detention Facility To Offer Ideas – Despite Lack Of Experience With His Own State Prison System

Romney Had Only Toured Massachusetts' Troubled Prisons "Once Briefly." "Gov. Mitt Romney, who has only visited the state's troubled prisons once briefly, will tour the U.S. military base at Guantanamo Bay, Cuba, tomorrow to share his ideas on prison 'best practices,' a spokesman said yesterday." (Michelle McPhee, "Say It Ain't Mitt-Mo," *Boston Herald*, 4/21/06)

- **Romney's Spokesman Acknowledged Lack Of Hands-On Experience In State.** "Fehrnstrom acknowledged Romney's only prison visits while in office were a tour of a residential pre-release program in Boston and a press conference he held in the parking lot of the Souza-Baranowski Correctional Center in Shirley, which he did not tour." (Michelle McPhee, "Say It Ain't Mitt-Mo," *Boston Herald*, 4/21/06)
- **Purpose Of Guantanamo Trip Was To Share Best Practices Of State Institutions.** "The one-day trip is an opportunity for them to see how the prison operates and to share ideas on the way their state prisons are run, Romney spokesman Eric Fehrnstrom said." (Brooke Donald, "Romney, Huckabee To Visit Guantanamo Bay," *The Associated Press*, 4/20/06)

Boston Herald: Romney Did Not Spend "Any Quality Time" At State Prisons. "The notion that military brass are just waiting around for this state's governor to swing by and offer them his best advice on running a military prison, now in its fourth year of operation, is kind of amusing. Well, it would be amusing if Mitt Romney had actually spent any quality time visiting prisons here in Massachusetts." (Editorial, "Gitmo Gov On The Fly," *Boston Herald*, 4/22/06)

Romney Brought Corrections Commissioner With Him To Guantanamo Despite Criticism Of Department

Commissioner Kathleen Dennehy Joined Romney's Trip To Cuba Even Though Her Department Had Been "Barraged By Criticism." "Department of Correction Commissioner Kathleen Dennehy is joining Romney on the trip. Dennehy was named commissioner in 2004 and oversees 18 correctional facilities across Massachusetts. The state's prison system under Romney has been barraged by criticism from elected officials, members of an independent committee appointed by Romney and prison reform advocates." (Emma Ratliff, "Healey Defends Mitt's Cuba Excursion, Record On Prisons," *Boston Herald*, 4/22/06)

- **Massachusetts Prison System Given Poor Grades In Multiple Areas.** "All give the system poor grades for health care and communicable diseases, the security and safety of guards and inmates, an abusive internal corrections culture and other failings." (Emma Ratliff, "Healey Defends Mitt's Cuba Excursion, Record On Prisons," *Boston Herald*, 4/22/06)

CHIEF MEDICAL EXAMINER'S OFFICE

Medical Examiner's Office Was Investigated For Various Missteps As Whistleblowers Noted Lax Conditions

State Medical Examiner's Office, Under Jurisdiction Of Romney Administration, Was Investigated By Attorney General In 2003 For Botching Infant Death Investigation. "The [Medical Examiner's] office, which lawmakers and officials have for years called underfunded and understaffed, is now under investigation by the attorney general's office for sending the wrong set of eyeballs for testing following an infant's death. Lawmakers plan hearings next month on restructuring the office, and Republican Gov. Mitt Romney's administration, which oversees it, is implementing its own changes." (Ken Maguire, "Medical Examiner's Office Under Fire," *The Associated Press*, 11/14/03)

- **"The Medical Examiner's Office Has Also Been Criticized In Recent Months For ... Misidentifying A Fire Victim's Body, Which Was Later Cremated."** (Jonathan Saltzman, "DA's Rap Governor's Death Penalty Plan," *The Boston Globe*, 5/4/04)

Whistleblowers Sued Medical Examiner's Office After Being Fired Or Disciplined For Their Actions. "The state Medical Examiner's Office, which oversees vital evidence in murder cases, handles body parts and other evidence in a lax and primitive manner, says a pathologist fired soon after bringing that and other problems to the attention of the governor. Dr. Abraham T. Philip was in the office as a contractor from October 2003 to March 2004, and also worked there from 2000 to 2002. He is the fourth whistleblower to sue the M.E.'s Office after being disciplined or dismissed, he claims for trying to reform the embattled department." (Tom Mashberg & Maggie Mulvihill, "M.E. Office In Critical Condition," *Boston Herald*, 5/24/04)

Romney Vetoed Reorganization Measure Affecting Medical Examiner's Office And State Crime Lab

In 2003, Joint Legislative Committee Hearing Was Called To Discuss Reorganization Of Medical Examiner's Office. "The Public Safety and Criminal Justice legislative committees have called a Dec. 2 joint hearing into the workings of the office. Public Safety Chairman Sen. Jarrett Barrios, D-Cambridge, said he'll revisit a proposal to collapse the medical examiner's office, State Police crime lab, and related offices into one forensic sciences department." (Ken Maguire, "Medical Examiner's Office Under Fire," *The Associated Press*, 11/14/03)

Romney Had Previously Vetoed Measure Allowing Forensic Sciences Department To Take Charge Of Medical Examiner's Office. "A state budget provision would have taken those steps, but Romney vetoed it, opting to increase the medical examiner's budget by 30 percent." (Ken Maguire, "Medical Examiner's Office Under Fire," *The Associated Press*, 11/14/03)

- **Romney's Veto Message:** "Although I support the idea of improving forensic services, I am vetoing this section because I think this initiative requires more study." (Sean Murphy, "Travaglini Blasts Romney Over Medical Examiner's Office Contends Governor Deferred Overhaul," *The Boston Globe*, 1/24/04)

Sen. Jarrett Barrios (D), Public Safety Committee Chairman: Romney "Refused" To Deal With ME's Office As Part Of Government Reorganization. "The governor himself proposed reorganizing state government to promote efficiencies and cost savings. He refused to deal with the medical examiner's office as part of that." (Ken Maguire, "Medical Examiner's Office Under Fire," *The Associated Press*, 11/14/03)

Backlog Issues At Medical Examiner's Office And Crime Lab Led To Criticism Of Romney's Proposed "Foolproof" Death Penalty System

District Attorneys Criticized Romney's Death Penalty Proposal In Part Because Of Problems With Crime Lab And Medical Examiner's Office. "Several district attorneys criticized Governor Mitt Romney's proposal to establish what he insisted would be a nearly foolproof death penalty system, with the prosecutors saying yesterday that the troubled state medical examiner's office and State Police crime laboratory can barely carry out current responsibilities, let alone make sure that innocent people don't end up on death row." (Jonathan Saltzman, "DA's Rap Governor's Death Penalty Plan," *The Boston Globe*, 5/4/04)

Norfolk DA Called Romney Proposal "Ridiculous" To Add Responsibility To Overburdened Crime Lab And Medical Examiner. "But Norfolk District Attorney William R. Keating said it is ridiculous for the state to consider giving the medical examiner's office and crime lab the added task of analyzing scientific evidence in death penalty cases. Both offices have struggled with crushing backlogs, Keating said, with delays of several

months in getting scientific analyses for criminal cases.” (Jonathan Saltzman, “DA’s Rap Governor’s Death Penalty Plan,” *The Boston Globe*, 5/4/04)

In 2004, Romney Defended Embattled Outgoing Medical Examiner Richard Evans And Kept Him On State Payroll At Higher Salary After New Chief Was Appointed

Romney Defended Chief Medical Examiner Richard Evans, Who Then Was Facing “Multi-Pronged” Probe By State Ethics Commission Into His Decade In Office. “[F]lynn and Gov. Mitt Romney defended permitting investigation-plagued Chief Medical Examiner Richard F. Evans to remain in his \$128,000-a-year post after Flynn said Evans had ‘reached the Peter Principle’ with regard to Evans’ ability to run his besieged office. The *Herald* reported Tuesday that Evans is facing a multi-pronged probe by the State Ethics Commission into his 10-year tenure in the office, including charges he let tens of thousands in federal grant money be misused on salaries and other inappropriate items.” (Tom Mashberg, “Union Is Calling For Flynn To Resign,” *Boston Herald*, 1/17/04)

Romney “Defended The Skills Of The Embattled” Evans. “Gov. Mitt Romney defended the skills of the embattled outgoing chief medical examiner Monday as he appointed a panel of experts to find a new person to head the office, which has been blamed for losing body parts and accused of misusing government grants.” (Karen Testa, “Governor Defends Embattled Chief ME As He Seeks Increase In Funding,” *The Associated Press*, 1/12/04)

- **Romney Said Underfunding Was Responsible For Office’s Woes.** “Romney blamed years of reported problems on more than a decade of underfunding and said he’d request a 60 percent increase – an additional \$2.2 million – to bring the office in line with the latest technology and offer higher salaries to attract stronger candidates.” (Karen Testa, “Governor Defends Embattled Chief ME As He Seeks Increase In Funding,” *The Associated Press*, 1/12/04)

Evans Retained State Job And Received Generous Salary Increase After Being Demoted And While Under Investigation. “Disgraced former chief medical examiner Dr. Richard Evans not only still works in the state office where he was demoted earlier this year following allegations of misconduct – he’s making a lot more money than he did when he was running the place, the *Herald* has learned. Romney’s office repeatedly refused to answer questions about Evans last night.” (Laurel J. Sweet, “Disgrace Brings Dividend,” *Boston Herald*, 10/28/05)

Romney Appointed Under-Certified Pathologists To Commission Charged With Recruiting New Medical Examiner

January 2004: One Day After Announcing Intent To Replace Chief Medical Examiner Evans, Reports Revealed Romney’s Appointees To Commission Tasked With Finding Replacement Did Not Meet Certification Requirements. “One day after Governor Mitt Romney publicly pledged to replace the state’s embattled chief medical examiner, his administration conceded yesterday that two of the governor’s appointments to a commission named to recruit a new medical examiner do not meet legal requirements.” (Sean Murphy, “Concerns Raised On Examiner Commission,” *The Boston Globe*, 1/14/04)

- **State Law Requires Two Commission Members To Be Forensic Pathologists Certified By American Board Of Pathology, But Romney Appointed Two Pathologists Who Were Not ABP-Certified.** “Wilkins said in an interview that the governor’s office had made a ‘good faith effort’ to comply with the state statute for appointing the Commission on Medicolegal Investigation, which requires membership of two forensic pathologists certified by the American Board of Pathology. ... Wilkins said the governor’s office discussed appointing the commission without the requisite forensic pathologists, but eventually decided to appoint two pathologists who lack certification in forensic pathology.” (Sean Murphy, “Concerns Raised On Examiner Commission,” *The Boston Globe*, 1/14/04)

Romney Allowed Reporters To Be Misinformed On The Status Of Commissioners’ Certification Status. “Romney made no mention of the lack of forensic pathologists on the commission on Monday when he introduced and swore into office commission members at a State House news conference. The governor was asked by a reporter, ‘Are the forensic pathologists on this commission certified as required by statute?’ In response, Romney turned to the newly sworn-in commission members and asked, ‘Are there any forensic scientists on this commission that are not board certified?’ After a moment of silence, Romney smiled, and replied, ‘They are all certified.’” (Sean Murphy, “Concerns Raised On Examiner Commission,” *The Boston Globe*, 1/14/04)

Romney’s 2005 Choice For Medical Examiner Later Criticized For “Sickening Backlog Of Decomposing Bodies” At M.E.’s Office

March 2007: Medical Examiner's Office, Led By Chief Examiner Mark Flomenbaum, Criticized For Having "Dozens Of Corpses Stacked Up For Months." "Horried by a *Herald* report describing a sickening backlog of decomposing bodies, a top state official yesterday ordered the immediate removal of dozens of corpses stacked up for months at the medical examiner's office. ... Burke, whose Executive Office of Public Safety oversees the ME's office, said he would meet this morning with Chief Examiner Mark A. Flomenbaum to demand answers about the shocking conditions at the office..." (Laura Crimaldi, "M.E. Ordered To Clear Out Bodies," *Boston Herald*, 3/16/07)

Romney Chose Flomenbaum To Be Medical Examiner In 2005. "Last month, Romney installed a new leader in the office, Dr. Mark A. Flomenbaum, a former New York City medical examiner who aided in the aftermath of the Sept. 11, 2001, attacks." (Michael Levenson, "Romney Seeks \$1B For State Projects," *The Boston Globe*, 5/7/05)

"[Flomenbaum] Took Over The Office With Great Fanfare In 2005, Under Gov. Mitt Romney, Vowing To Clean Up One Of The Most Discredited Examiner's Offices In The Nation." (Laura Crimaldi, "M.E. Ordered To Clear Out Bodies," *Boston Herald*, 3/16/07)

STATE CRIME LAB/DNA BACKLOG

Romney Promised To Upgrade State's Crime Lab As He Ran For Governor

Romney Campaigned "On Promises To Upgrade The State's Crime Lab." "Romney, who campaigned in part on promises to upgrade the state's crime lab, says it's simply a matter of empowering police to solve new crimes and to match data samples to solve old ones." (Raphael Lewis, "Romney To Sign DNA Bill Today," *The Boston Globe*, 11/12/03)

Media Reviews: Romney Did Little To Address "Severe Backlog" In DNA Testing System

***Boston Herald* Writers: Romney Administration "Has Done Little To Address The Severe Backlog" In DNA Testing At State Police Crime Lab.** "On the public safety front, the governor's brochure claims he has 'toughened public safety' by cracking down on sex offenders and reforming corrections, forensics and other agencies. ... But the state has failed to join a compact that would inform Massachusetts when dangerous felons and predators come here, has had difficulty in tracking sex offenders when they move or fail to register and has done little to address the severe backlog in DNA testing at the state police crime lab." (Brett Arends et al, "Romney Fails To Make The Grade," *Boston Herald*, 6/29/05)

"The [Crime] Lab Has Often Been The Subject Of Criticism Because Of Chronic Understaffing And Long Delays In Processing DNA Samples, Which Are Often Crucial To Criminal Investigations And Trials." (Ralph Ranalli, "DNA Test Backlog Worsens In Mass.," *The Boston Globe*, 4/23/05)

State Recently Spent Almost \$270,000 To Hire Firm To Conduct "Top-To-Bottom Review" Of Crime Lab. "The problems have embarrassed state officials and prompted inquiries by the State Police, the FBI, and a private consulting company, Vance, recently hired to conduct a \$267,000 top-to-bottom review of the crime lab." (Jonathan Saltzman, "DNA Chief Fired Over Crime Lab Problems," *The Boston Globe*, 4/14/07)

2003 Expansion Of DNA Database – Signed Into Law By Romney – Blamed For Worsening DNA Backlog

Romney Signed Into Law Measure Requiring Everyone Convicted Of Felony In Massachusetts To Submit DNA Sample For State Database. "Declaring that 'the long arm of the law just got a little longer,' Governor Mitt Romney today visited the State Police Crime Lab to sign legislation requiring all convicted felons to provide DNA samples to the state's database. 'I want to make sure that our law enforcement officials have the best possible tools at their disposal to do their jobs and keep our neighborhoods safe,' Romney said. 'The state's DNA database is one of the most important tools they have.'" (Gov. Mitt Romney, Press Release, 11/12/03)

- **"Following A Signing Ceremony At The State Police Crime Lab In Sudbury, Romney Called The New Law One Of The Most Important Tools Available To Law Enforcement Investigators."** ("Romney Signs Bill Expanding State's Criminal DNA Database," *The Associated Press*, 11/12/03)
- **Measure Passed 146-4 In The House:** "Lawmakers in the House also voted 146-4 in favor of a bill to expand the state's DNA database to include everyone convicted of a felony." ("Legislature Sends Romney Bill Updating Sex Offender Law," *The Associated Press*, 9/30/03)

- **Measure Passed 36-1 In The Senate:** “Critics say the bill, which was approved by the Senate by a 36-1 margin, is too broad and should be limited only to more serious felonies.” (Steve LeBlanc, “Senate Approves Bill To Expand The State’s Criminal DNA Database,” *The Associated Press*, 10/23/03)

Several Experts Have Criticized The ‘03 Law As Cause Of “Overwhelming Backlogs And Administrative Problems.” “[S]everal prominent figures in the field nationwide have rallied to [Pino’s] defense and characterized him as a victim of circumstances that afflict many crime labs nationwide. ... They also said that a 2003 law that expanded the state’s DNA database to include samples from all convicted felons – instead of the 33 serious and violent felonies in the 1997 law creating the computerized archive – led to overwhelming backlogs and administrative problems similar to those in other states that broadened their databases.” (Jonathan Saltzman, “DNA Chief Fired Over Crime Lab Problems,” *The Boston Globe*, 4/14/07)

“[D]etractors Fear That The New Law Represents A Serious Encroachment On Privacy Rights...” “All convicted felons in Massachusetts, from those who commit murder to those who steal live poultry, will be required to submit DNA samples to the State Police under a controversial bill being signed today by Governor Mitt Romney. ... But even as Romney tells those gathered today that ‘the long arm of the law just got a little longer,’ detractors fear that the new law represents a serious encroachment on privacy rights, mostly because several of the hundreds of felonies on the books are low-level offenses. A felony is any crime for which those convicted can be sent to a state prison.” (Raphael Lewis, “Romney To Sign DNA Bill Today,” *The Boston Globe*, 11/12/03)

- **State Officials Share DNA Data With Federal Government.** “Currently, the state’s five-year-old database holds approximately 20,000 DNA samples collected by swabbing the cheeks of those convicted of any of 33 serious or violent felonies. ... State officials share the DNA data with the federal government, which maintains a database that holds samples from all states compiling such information.” (Raphael Lewis, “Romney To Sign DNA Bill Today,” *The Boston Globe*, 11/12/03)

In 2003, Northeastern University Professor James Alan Fox Warned Measure Could Lead To Wasteful Spending And An Unwieldy, Oversized Database. “[J]ames Alan Fox, a professor of criminal justice at Northeastern University, said the investment may not be worth it, given that most low-level criminals do not become repeat offenders. ‘Most low-level criminals will not do it again, so we may be spending lots of resources on collecting and storing a large amount of genetic data for nothing,’ Fox said. More problematic, he said, is the possibility that such a large database can quickly become unwieldy and overwhelm law enforcement authorities.” (Raphael Lewis, “Romney To Sign DNA Bill Today,” *The Boston Globe*, 11/12/03)

- **Fox: “There’s A Recent, Rich History In Which Overburdened Labs Have Made Errors.”** (Raphael Lewis, “Romney To Sign DNA Bill Today,” *The Boston Globe*, 11/12/03)

Prior Law Required Only Those Convicted Of 33 Specific Violent Crimes To Submit DNA Sample. “The new law requires every convicted felon in the Bay State, including those now incarcerated or on parole, to provide a DNA sample to the state database. The prior law only required felons convicted of 33 sex-related and violent crimes to submit such samples.” (Gov. Mitt Romney, Press Release, 11/12/03)

Law Was Expected To Expand State’s DNA Database Five-Fold While Costing Over \$3.5 Million. “The current DNA database has about 20,000 samples. Under the new law, the number is expected to grow to about 100,000 in a few years. Expanding the database is expected to cost about \$3.6 million, although the state could receive federal reimbursement.” (“Romney Signs Bill Expanding State’s Criminal DNA Database,” *The Associated Press*, 11/12/03)

Underfunding And Understaffing Of Crime Lab Was A Frequent Complaint

Waiting Nine Months For DNA Testing Results Was “Not Unusual.” “The slow pace of the DNA testing has drawn attention to a frequent complaint by the state’s prosecutors: the crime lab is understaffed and underfunded and has had to closely ration how many DNA tests local law enforcement agencies are allowed to submit. Waiting nine months for results is not unusual.” (Theo Emery, “Worthington Case Draws Attention To DNA Backlog At Crime Lab,” *The Associated Press*, 4/23/05)

- **Crime Lab Could Only Handle One-Sixth Of State’s DNA Testing Demands Each Year.** “The DNA lab itself occupies just 840 square feet, where a dozen chemists handle about 300 DNA tests per year. That’s roughly one-sixth of the state’s demand, according to lab director Carl Selavka.” (Theo Emery, “Worthington Case Draws Attention To DNA Backlog At Crime Lab,” *The Associated Press*, 4/23/05)

- **District Attorneys Were Limited To Only Four DNA Sample Requests Per Month.** “Each month, the state’s 11 district attorneys are allowed to submit up to four DNA samples, meaning investigators must prioritize cases and put DNA testing for less important cases on hold.” (Theo Emery, “Worthington Case Draws Attention To DNA Backlog At Crime Lab,” *The Associated Press*, 4/23/05)
- **Public Safety Secretary Claimed Crime Lab Had Been Reorganized But Still Needed Funding.** “State Public Safety Secretary Edward Flynn said the crime lab was an ‘absolute disgrace’ before it was put under the control of the state police in the 1990s. It has since been reorganized and accredited by a national organization, but until recently, its funding needs were neglected.” (Theo Emery, “Worthington Case Draws Attention To DNA Backlog At Crime Lab,” *The Associated Press*, 4/23/05)

Slow Improvement At Crime Lab Was Expected, With Time Frame Of Five To Seven Years Floated By Officials

Despite Added Funding And Staffing, Improvement At State Crime Lab Expected To Be Slow. “Even if the state continues to pump money and scientists into its overburdened crime laboratory, it will take ‘five to seven years’ before DNA testing can be turned around in 30 days rather than the current rate of up to 15 months, officials told a legislative committee yesterday. Although the state will double the 12 DNA chemists within a year and plans to build a new crime lab capable of meeting all the commonwealth’s forensic testing needs, it would take 80 scientists alone to handle the massive requests for DNA testing.” (Tom Farmer, “Crime Lab Shows Evidence Of Slow Progress,” *Boston Herald*, 5/13/05)

“The Legislature Has Increased Funding To The Lab, From \$6.2 Million In Fiscal 2005 To \$16.2 Million In Fiscal 2007.” (Jonathan Saltzman, “DNA Chief Fired Over Crime Lab Problems,” *The Boston Globe*, 4/14/07)

State Backlog Of DNA Testing Blamed In Part On Federal Requirement For Inclusion In FBI Database

Massachusetts Officials Blamed FBI Requirement That Samples Be Tested Twice Before Being Logged Into National Database As Reason For Increase In State-Level Backlog. “The backlog for testing DNA samples at the State Police Crime Laboratory has doubled in the last few months because of what state officials are calling a burdensome new requirement that the DNA from convicted felons in Massachusetts be tested twice before it is submitted to the FBI’s national data base. ... State public safety officials said that the backlog caused by the new FBI requirement means that it now takes 15 months on average for a DNA sample to come back from the lab, twice as long as before the requirement.” (Ralph Ranalli, “DNA Test Backlog Worsens In Mass.,” *The Boston Globe*, 4/23/05)

Romney’s “Foolproof” Death Penalty Proposal Criticized Due To Backlog Issues

District Attorneys Criticized Romney’s Death Penalty Proposal In Part Because Of Problems With Crime Lab And Medical Examiner’s Office. “Several district attorneys criticized Governor Mitt Romney’s proposal to establish what he insisted would be a nearly foolproof death penalty system, with the prosecutors saying yesterday that the troubled state medical examiner’s office and State Police crime laboratory can barely carry out current responsibilities, let alone make sure that innocent people don’t end up on death row.” (Jonathan Saltzman, “DA’s Rap Governor’s Death Penalty Plan,” *The Boston Globe*, 5/4/04)

Norfolk DA Called Romney Proposal “Ridiculous” To Add Responsibility To Overburdened Crime Lab And Medical Examiner. “But Norfolk District Attorney William R. Keating said it is ridiculous for the state to consider giving the medical examiner’s office and crime lab the added task of analyzing scientific evidence in death penalty cases. Both offices have struggled with crushing backlogs, Keating said, with delays of several months in getting scientific analyses for criminal cases.” (Jonathan Saltzman, “DA’s Rap Governor’s Death Penalty Plan,” *The Boston Globe*, 5/4/04)

Romney Unilaterally Slashed Crime Lab Funding Weeks Before Leaving Office

Romney Claimed That Irresponsible Legislative Spending Necessitated Cuts As He Left Office. “In a final splash before leaving the corner office, Gov. Mitt Romney yesterday slashed \$425 million from the current year’s budget, saying the Legislature’s irresponsible spending left him no choice. ... Included in Romney’s cuts are several items that Lt. Gov. Kerry Healey -- who ran for governor on public safety issues -- would likely have objected to prior to Election Day: funding for the state police crime lab, the Sex Offender Registry Board and anti-gang initiatives.” (Rebecca Fater, “Romney Slashes State’s Spending,” *The Berkshire Eagle*, 11/11/06)

In 2006, Romney Appointed Former Crime Lab Manager Mark Delaney To Head State Police Force

Romney Appointed Delaney To Lead State Police Following Four-Year Stint Running State Crime Lab. "State Police Maj. Mark Delaney ... was appointed as head of the law enforcement agency on Thursday. ... Delaney was appointed head of the State Police forensics lab in 2002 and presided over a revamping in the wake of delays in processing DNA evidence. (Glen Johnson, "Head Of State Police Forensic Lab Named To Run Department," *The Associated Press*, 5/18/06)

- **Romney, On Delaney's Appointment:** "He's a law enforcement officer with 32 years of experience, and he knows the force inside and out." (Glen Johnson, "Head Of State Police Forensic Lab Named To Run Department," *The Associated Press*, 5/18/06)

Months Later, It Was Revealed Delaney Oversaw Crime Lab During Period When DNA Tests Were Mishandled

Crime Lab Administrator Failed To Notify Prosecutors Of DNA Matches, Allowing Statute Of Limitations To Expire. "An administrator at the troubled State Police crime laboratory has been suspended for failing to tell prosecutors of DNA matches in a number of unsolved rape cases, which now cannot be pursued because the statute of limitations has expired, the head of the State Police said yesterday." (Jonathan Saltzman, "Crime Lab Mishandled DNA Results," *The Boston Globe*, 1/13/07)

Administrator Also Falsely Reported DNA Matches To Suspects. "The administrator, whom officials would not name, also told police and prosecutors that tests in an unspecified number of cases linked DNA recovered at crime scenes to suspects, when in fact they had not, Colonel Mark F. Delaney, superintendent of the State Police, said in a statement." (Jonathan Saltzman, "Crime Lab Mishandled DNA Results State Police Suspend Aide, Ask FBI Audit," *The Boston Globe*, 1/13/07)

Delaney Was Top Manager At Crime Lab When The DNA Test Results Were Mishandled. "[S]tate Police Colonel Mark Delaney, who now leads the State Police and was the lab's top manager while the DNA test results were mishandled, asked for the review." (John Ellement, "Outside Consultant To Review Crime Lab," *The Boston Globe*, 1/27/07)

April 2007: Head Of Crime Lab's DNA Database Fired After Allegedly Mishandling Dozens Of Test Results

DNA Database Administrator Robert Pino Was Fired After Supposedly Mishandling Test Results For Two-Dozen Sexual Assault Cases Where Statute Of Limitations Ran Out. "The embattled administrator of the DNA database at the State Police crime laboratory was fired yesterday, three months after the agency suspended him for allegedly mishandling test results in about two-dozen unsolved sexual assault cases, according to the lawyer for his union. Robert Pino, a 23-year civilian employee of the lab who testified in more than 240 criminal cases and helped set up the state database, was sent a letter yesterday saying he was terminated..." (Jonathan Saltzman, "DNA Chief Fired Over Crime Lab Problems," *The Boston Globe*, 4/14/07)

Pino Was Second High-Ranking Crime Lab Official To Resign In Span Of Five Weeks. "Pino is the second laboratory employee to lose his job over problems with the handling of DNA test results, including the alleged failure to report positive DNA matches before the statute of limitations ran out. On March 9, Carl Selavka, the civilian director of the lab since July 1998 and one of Pino's supervisors, abruptly resigned under pressure, after what Public Safety Secretary Kevin M. Burke described as an unfavorable assessment of his performance." (Jonathan Saltzman, "DNA Chief Fired Over Crime Lab Problems," *The Boston Globe*, 4/14/07)

ROMNEY VETOED SEX OFFENDER REGISTRATION FEE

In 2003, Romney Vetoed Annual Registration Fee For Sexual Offenders And Up To \$750,000 To Cut Down On Backlog Of Sex Offenders Not Classified By State

Romney Vetoed New \$75 Annual Fee For Sex Offender Registration – His Veto Was Overturned By The House. "Beacon Hill lawmakers overturned Gov. Mitt Romney's veto of \$23 million in additional state aid to cities and towns ... House lawmakers also overturned Romney's veto of a new \$75 annual fee for sex offenders when they renew their listing on the state's sex offender registry. ... Romney vetoed the fee, saying it would discourage sex offenders from renewing their registration." (Steve LeBlanc, "Legislature Restores State Aid To Local Communities, Sex Offender Fee," *The Associated Press*, 7/8/03)

Romney Also Vetoed Up To \$750,000 In Funding Aimed At Cutting Down Backlog Of Sex Offenders Not Yet Classified By State – Veto Overturned By House. "Another section of the budget, also vetoed by Romney,

would use up to \$750,000 collected from the new [sex offender] fees to cut down on the current backlog of sex offenders yet to be classified by the state. The House overturned that veto too.” (Steve LeBlanc, “Legislature Restores State Aid To Local Communities, Sex Offender Fee,” *The Associated Press*, 7/8/03)

Romney’s Own Lieutenant Governor – Republican Kerry Healey – Opposed Veto Decision

Lt. Gov. Kerry Healey (R) Disagreed With Romney Vetoes On Sex Offender Registration Fee And Classification Backlog Funds. “[Healey] said she disagreed with Romney’s decision in 2003 to veto a \$75 fee that would have been imposed on convicted sex offenders. She also said she disagreed with another veto to spend \$750,000 collected from the fees to reduce a backlog of sex offenders waiting at the time to be classified by the state. The Legislature overrode those vetoes. ... ‘No, I did not,’ Healey said when asked if she supported Romney’s vetoes.” (Glen Johnson, “Healey Signs Sex Crimes Statute Extension Into Law,” *The Associated Press*, 9/21/06)

In Wake Of Romney Vetoes, Investigation Disclosed That State Lost Track Of One-Third Of State’s High-Risk Sex Offenders

In November 2003, Investigation Found State Had Lost Track Of One-Third Of Worst Sex Offenders. “The Romney administration plans to conduct a monthlong ‘intensive sweep’ for unregistered sex offenders using the state police’s fugitive hunting squad, officials said yesterday. ... [The] announcement comes in the wake of an investigation by the Boston Herald and Fox 25 that found about one-third of Massachusetts’ high-risk offenders - categorized as Level 3 - are skirting the sex offender registry law by providing phony or outdated addresses to the state’s Sex Offender Registry Board.” (Jack Meyers and Jonathan Wells, “Round ‘Em Up,” *The Boston Herald*, 11/7/03)

Legislature Immediately – And Unanimously – Overturned Romney Veto Of \$240,000 In Funding For Sex Offender Registry Board. “Authorities would get an extra \$240,000 this year to help track the state’s worst sex offenders, under a measure approved Thursday by the House, whose Democratic leaders took issue with criticism from Gov. Mitt Romney. The unanimous vote was an override of one of Romney’s vetoes ... The vote comes days after an investigation by the Boston Herald and WFXT-TV showed that Massachusetts has lost track of about one-third of its worst sex offenders because of false or outdated information about their home and work addresses.” (Ken Maguire, “House Approves Funds To Track Sex Offenders,” *The Associated Press*, 11/6/03)

- **“The Senate Also Voted To Override A Romney Veto And Restore \$240,000 To The Sex Offender Registry Board.”** (Steve LeBlanc, “House And Senate Debate Amendments To Supplemental Spending Plan,” *The Associated Press*, 11/13/03)

In 2005, Romney Again Vetoes Registration Fee For Sex Offenders

Romney Vetoes Provision Requiring Sexual Offenders To Pay \$75 Registration Fee. “Gov. Mitt Romney signed the state’s \$23.8 billion budget into law on Thursday, but vetoed about \$110 million dollars in spending that he deemed ineffective or wasteful. ... Romney also got rid of a \$75 fee that sexual offenders would have been required to pay when they registered with the state.” (Theo Emery, “Governor Signs Budget, But Strips About \$110 Million,” *The Associated Press*, 6/30/05)

State Legislature Upheld Romney’s Veto. “Lawmakers let stand Romney’s veto of a \$75 fee that sexual offenders would have been required to pay when they registered with the state. The administration said the fee would have discouraged offenders from registering.” (“House And Senate Override Romney Budget Vetoes,” *The Associated Press*, 7/20/05)

In November 2006, Romney Unilaterally Cut Sex Offender Registry Funds Before Leaving Office

Weeks Before Leaving Office, Romney Again Cut The Budget Of The Sex Offender Registry Board. “In a final splash before leaving the corner office, Gov. Mitt Romney yesterday slashed \$425 million from the current year’s budget, saying the Legislature’s irresponsible spending left him no choice. ... Included in Romney’s cuts are several items that Lt. Gov. Kerry Healey -- who ran for governor on public safety issues -- would likely have objected to prior to Election Day: funding for the state police crime lab, the Sex Offender Registry Board...” (Rebecca Fater, “Romney Slashes State’s Spending,” *The Berkshire Eagle*, 11/11/06)

SOCIAL SECURITY

Romney “Adamantly” Opposes Raising Taxes For Social Security

Romney Said Tax Increases Are Not The Solution. “Mitt Romney told small business leaders in South Carolina on Friday that tax increases are not the solution to Social Security.” (Meg Kinnard, “Romney Stresses Business Leadership During S.C. Campaign Stop,” *The Associated Press*, 4/13/07)

- **Romney:** “The lever we don’t pull is the tax lever.” (Meg Kinnard, “Romney Stresses Business Leadership During S.C. Campaign Stop,” *The Associated Press*, 4/13/07)

Romney “Adamantly” Opposes New Payroll Taxes. “Romney has been adamantly opposed to a new payroll tax on businesses.” (Scott Helman, “Mass. Bill Requires Health Insurance,” *The Boston Globe*, 4/4/06)

As Presidential Candidate, Romney Is Not Advocating Clear Solution For Social Security

Romney Has Not Offered “Specific Proposal To Keep Program Solvent.” “Romney: Wants to reform Social Security for younger workers. Did not offer specific proposal to keep program solvent. ‘It is past time for Republicans and Democrats to come together and agree on a solution, instead of kicking the can down the road for some future generation to solve.’” (“GOP Issues,” *The State*, 5/13/07)

Romney Called For Independent Panel To Fix Social Security. “Gov. Mitt Romney said Friday that because of a partisan divide on the issue, it’s probably not a bad idea to turn Social Security reform over to an independent panel similar to the one that recommended military base closings.” (Mike Glover, “Romney: Independent Panel May Best Reform Social Security,” *Associated Press*, 8/25/06)

- **Romney:** “If there’s a partisan divide, then we may have to move to a (base closing) kind of approach to end up with a solution that makes sure that we honor the expectations of our seniors, but also doesn’t put us in the position where we can’t honor the promises that are being made to 30- year-olds and 40-year-olds.” (Mike Glover, “Romney: Independent Panel May Best Reform Social Security,” *Associated Press*, 8/25/06)

Romney “Intrigued” By President Bush’s Reform Plan

Romney “Intrigued” By Robert Posen’s Plan For “Progressive Indexation” And Personal Savings Accounts. “Aides say Romney is also intrigued by the ideas of Democrat Robert Pozen, chairman of Boston-based MFS Investment Management and a member of Bush’s 2001 Social Security Commission. Pozen’s “progressive indexation” plan would maintain the current Social Security benefit formula for the poor while providing gradual benefit reductions for wealthier individuals. People who receive reduced benefits would be able to put as much as 2 percent of their pay into private investment accounts, a favorite Bush idea.” (“Romney, Battered Over Social Issues, Shifts Focus To Economics,” *Salt Lake Tribune*, 2/7/07)

- **Romney Hired Architects Of President Bush’s Social Security Plan.** “Many on Romney’s economic team worked for President Bush, including Glen Hubbard, the former chairman of the president’s Council of Economic Advisers, and Robert Posen, who helped craft the president’s failed 2005 plan to reform Social Security with private accounts.” (Fox News’ “Special Report,” 2/7/07)

Romney: Personal Savings Accounts “The Right Kind Of Ideas.” CNBC’s LARRY KUDLOW: “And just in the last few seconds, sir, Bush’s ownership ideas, 401(k)s for retirement, IRA’s for Social Security, health savings accounts for healthcare, are those things you would favor?” ROMNEY: “Those are the right kinds of ideas. Give Americans the opportunities to save, to invest in an ownership society. Let them have participation in the future of this country. And it’s an economic growth so--so we’re all pulling in same direction.” (CNBC’s “Kudlow And Company,” 3/22/06)

Romney Saw Social Security As A Political Opportunity. “Romney said governors want Washington to tackle problems created by the looming baby boom retirement and growing pressure on programs for the poor. ... ‘We have an enormous age wave about to hit our safety net programs, our senior programs ... How do we deal with that? Now is a political opportunity.’” (Dan Balz, “GOP Governors Want A Seat At The Table,” *The Washington Post*, 11/22/04)

Romney Now Weighing “Deep Cuts” To Social Security After Opposing Any Cuts During ‘94 Senate Race

In 1994, Romney Promised No Cuts To Social Security. “In 1994, when Mitt Romney ran for U.S. Senate, he said he would not cut Social Security to meet his goal of balancing the federal budget.” (ABC’s “This Week,” 10/16/94)

- **Romney:** “I don’t think you go back and rewrite the contract the government has with people who’ve retired.” (ABC’s “This Week,” 10/16/94)

Running For President In 2007, Romney Is Now Reportedly “Weighing Deep Cuts” To Social Security. “[Romney] is weighing deep cuts in automatic-benefit programs such as Medicare and Social Security.” (Heidi Przybyla, “Romney, Battered Over Social Issues, Shifts Focus to Economics,” *Bloomberg News*, 2/7/07)

Romney Considered Cutting Fixed Income Retirement For Workers. “Instead of the traditional pension program that state-government employees, firefighters, teachers, and municipal workers rely on -- a program that traces its roots to 1910 -- Romney proposes one modeled after the 401(k) plans popular in the private sector. Romney’s staff says he wants to bring a more entrepreneurial spirit to the government work force, enticing people who aren’t looking for a job for life and would be able to take their 401(k) contributions with them when they move between the private and public sectors.” (Kimberly Blanton, “Massachusetts Governor May Eliminate Fixed Retirement Income for Workers,” *The Boston Globe*, 3/30/03)

Romney Has Attracted Criticism For His Changing Positions On Social Security. “From abortion, to gay marriage, to gun rights, to tax cuts, to immigration reform, to Social Security -- even his own political heroes -- Romney has switched his positions on just about every issue in this campaign.” (Heidi Przybyla, “Romney, Battered Over Social Issues, Shifts Focus To Economics,” *Bloomberg News*, 2/7/07)

VETERANS ISSUES

Shortly After Taking Office, Romney Proposed Cutting State Hiring Preferences For Veterans And Merging Veterans Care Facilities Into Jurisdiction Of Social Welfare Administrators

In One Of His Earliest Moves In Office, Romney Proposed Cutting State Hiring Preferences For Veterans And Aligning Veterans Services With State Welfare Programs. “Proposals by Gov. Mitt Romney to reduce hiring preferences for veterans and align veterans services with state welfare programs have triggered a harsh reaction among veterans groups and their supporters. ‘A veteran should not have to sit in a welfare line waiting for help,’ said Paul G. Keough, chairman of the Unified Veterans of Massachusetts. He criticized administration proposals to have veterans programs administered by the Executive Office of Health and Human Services and Department of Elder Affairs.” (John J. Monahan, “Veterans Groups Critical Of Romney Plan,” *Telegram & Gazette* [Worcester, MA], 3/18/03)

- **Romney Proposed Putting Veterans’ Care Facilities In Same Agency Handling Welfare Services.** “Another provision of the governor’s reforms would place operation of the Soldiers’ Homes in Chelsea and Holyoke with the same agency that handles welfare services for the disabled.” (John J. Monahan, “Veterans Groups Critical Of Romney Plan,” *Telegram & Gazette* [Worcester, MA], 3/18/03)
- **Romney Planned To Eliminate Veterans Hiring Preference And Replace It With A Point System.** “The preference puts veterans at the top of civil service hiring lists for many state and municipal jobs, including police and fire positions. Mr. Romney has proposed eliminating the preference and instead giving veterans civil service exam bonus points. Disabled veterans would get five extra points and other veterans would receive two bonus points on the tests.” (John J. Monahan, “Veterans Groups Critical Of Romney Plan,” *Telegram & Gazette* [Worcester, MA], 3/18/03)

State AARP President Called Romney Plan To Combine Veterans Affairs With Elder Affairs “Incomprehensible.” “Gov. Mitt Romney’s plan to restructure the Executive Office of Elder Affairs was expected to draw pointed criticism today at a state forum in Worcester. ... The move to combine elder affairs with veterans affairs is ‘incomprehensible,’ said Walt Sanders, president of AARP Massachusetts.” (Sue Scheible, “Elder Affairs Advocates Oppose Romney Plan,” *The Patriot Ledger* [Quincy, MA], 3/14/03)

- **AARP President: Proposal Did Not Make Sense.** “Combining veterans services with elder affairs does not make sense because ‘not all veterans are elders and not all elders are veterans,’ Sanders said. ‘If your intention is to truly eliminate the current confusing maze of bureaucracy, this runs completely counter to that goal.’” (Sue Scheible, “Elder Affairs Advocates Oppose Romney Plan,” *The Patriot Ledger* [Quincy, MA], 3/14/03)

2003: Legislators Overturned Romney Veto Of Tens Of Thousands In Funding For Veterans Cemetery. “[T]he Legislature last night restored more than \$150 million of the \$201 million cut by Gov. Mitt Romney. ... Among the vetoes the Legislature overrode yesterday, on what was the final day of formal deliberations before lawmakers broke for a summer recess, were: ... \$86,018 for the Agawam-Winchendon Veterans Cemetery.” (John Monahan, “Most Romney Vetoes Restored,” *Telegram & Gazette* [Worcester, MA], 7/18/03)

Romney Tried To Cut \$165,000 From Veterans Outreach In 2003. (Massachusetts Budget And Policy Center, "A Review Of The FY 2004 Vetoes And Overrides," www.massbudget.org, 7/28/03)

- **Romney Spokesman:** "There were line-item reductions in the veterans' budget, as there were in all areas of state government, but these reductions did not directly impact veterans' services ..." (Yvonne Abraham, "Democrats Slam Romney On Tunnel Name," *The Boston Globe*, 10/16/03)

Under Romney, State Sought To Increase User Fees For Long-Term Care At The Chelsea Soldiers' Home.

"Gov. Mitt Romney is vehemently opposed to raising taxes. Yet new fees proposed in his budget would hit a broad spectrum of people ... The changes include ... increasing user fees for long-term care at the Chelsea Soldiers' Home." (Jennifer Fenn, "Romney Budget Raises Fees, Which Democrats Say Are Taxes In Disguise," *Lowell Sun*, 2/28/03)

- **The Chelsea Soldiers' Home/Quigley Memorial Hospital Is A State Run Veterans' Hospital With Acute, Long Term Care And Domiciliary Units.** "Eligible veterans are provided a dorm style room with full meal service. As veterans need more care, they may progress to supervised programs with 24 hour nursing care or may become eligible for Skilled Nursing Care placement on one of the eight inpatient skilled nursing units." (MA Commission on End Of Life Care, www.endoflifecommission.org, Accessed 2/9/07)

Romney Staff Spent Tens Of Thousands On New Televisions And Cross-Country Travel While "Making Funding Cuts To Programs Including Ones Serving Veterans..."

"Governor Mitt Romney's staff spent tens of thousands of taxpayer dollars on cross-country travel and new televisions, VCRs and furniture for their offices in their first six months in office, according to a published report. ... Romney's aides spent almost \$40,000 on new office equipment and more than \$22,000 on travel ... The spending came as Romney was making funding cuts to programs including ones serving veterans, the mentally disabled and the elderly." ("Romney's Staff Spent Thousands Of Tax Dollars On New Office Equipment, Travel," *The Associated Press*, 11/16/03)

Romney Tax On Being Blind Was Opposed By Veterans Groups. "It now costs to be blind in Massachusetts. The state's approximately 35,000 blind and legally blind residents must now pay \$10 annually for a certificate of blindness and \$15 every four years for a blind identification card. ... The fees originated in February, in Gov. Mitt Romney's budget proposal for fiscal 2004. ... 'It's just another form of taxation,' said Stephen Matthews, a national service officer for the Blind Veterans Association, who has lobbied against the fees. 'They're burdening the people who can least afford it.'" (Shaun Sutner, "Advocates Fight Fees For The Blind," *Telegram & Gazette* [Worcester, MA], 8/5/03)

- **Veteran Speaks Out: "I Just Don't Understand This Foolishness."** "Previously, both the certificates and the ID cards were given out free to the 35,000 blind people living in Massachusetts. Romney proposed the new fees and the Legislature built them into the budget that took effect July 1. John Ray, an 85-year-old Army veteran of three wars who is blind, called the new fees 'an amateurish act' to bleed residents. 'I just don't understand this foolishness,' he said." (Elizabeth W. Crowley, "Pols Reconsidering Fee Hikes," *The Boston Herald*, 8/2/03)

1994 Romney Remark On Homeless Veterans "Not One Of The Brighter Moments Of His Campaign."

"From all accounts, Mitt Romney's visit to that veterans shelter just behind Boston's City Hall Plaza was not one of the brighter moments of his campaign for US senator. When director Ken Smith told him that one of the things the shelter needed was fresh milk, Romney replied jokingly that maybe the veterans should be taught how to milk COWS." (Michael Kenney, "Romney Comment Leads To Milk Run," *The Boston Globe*, 11/27/94)

BUSINESS RECORD

EXECUTIVE SUMMARY

- Romney spent most of his business career as CEO of private equity firm Bain Capital – as of June 2007 he maintained an investor's stake in the company.
- Bain Capital has been criticized for relentless focus on bottom line at expense of workers and jobs.
- Romney describes himself as a “business legend” in his campaign ads and once said of himself: “I’m basically in the investor’s Hall of Fame.”
- Bain Capital and Bain & Co. employees donated at least \$171,000 to Romney’s presidential campaign in Q1 2007 and gave tens of thousands more in support of his previous political activities.
- Bain Capital financed 1988 buyout with junk bonds issued by Drexel Burnham – when SEC filed charges against the firm and CEO Michael Milken, Bain Capital maintained their business relationship; Romney later reminisced about “the glorious days of Drexel Burnham.”
- In 2004, Bain & Co. received a multi-million dollar contract from the National Iranian Oil Company.
- Romney sat on board of directors of Bain portfolio company Damon Clinical Laboratories, which in 1996 was fined over \$100 million for Medicare fraud committed during Romney’s tenure.
- Bain Capital owned company named Ampad that purchased an Indiana paper plant, fired its workers and offered to bring them back at drastically reduced salary and benefits – the firings became an issue in the 1994 Senate race when workers blamed Romney for their situation and appeared in Kennedy campaign ads.
- After Romney became governor, Bain Capital teamed up with Chinese appliance maker Haier Group in 2005 in effort to purchase Newton, IA-based Maytag Corp. and send jobs overseas.
- At least two Bain Capital companies – Stream International and Modus Media – focused on outsourced technical support services, expanding facilities abroad while contracting operations in the United States.
- Bain Capital operated steel company called GS Industries which went bankrupt in 2001 after years of labor strife, closing a plant in Kansas City and laying off over 700 workers.

GENERAL BAIN OVERVIEW

Romney Remains An Investor In Bain Capital, The Private Equity Firm He Funded In 1984 – Partners Running The Company Today Were Brought On Board During Romney’s Tenure

As Of June 2007, Romney “Remains An Investor In Bain Capital.” “Mr. Romney, who remains an investor in Bain Capital, said he had not been involved in those decisions but acknowledged that such payments became part of the buyout business ‘very early on.’” (David D. Kirkpatrick, “Romney’s Political Fortunes Tied To Riches He Gained In Business,” *The New York Times*, 6/4/07)

“Romney Started Bain Capital In 1984, Made His Fortune There, And Ran It Before Moving Into The Governor’s Office Four Years Ago.” (Brett Arends, “American Workers’ Bane,” *Boston Herald*, 6/22/05)

- **Current Bain Capital Managing Partner Josh Bekenstein Founded Company With Romney In 1984.** “Mr. Bekenstein joined Bain Capital at its inception in 1984. He has been a Managing Director since 1986. Prior to joining Bain Capital, Mr. Bekenstein spent several years at Bain & Company where he was involved with companies in a variety of industries.” (Bain Capital Website, www.baincapital.com, Accessed 2/26/07)

Romney Ran Day-To-Day Operations At Bain Capital From Its Inception In 1984 Through Early 1999, When He Left To Assume Control Of The Salt Lake Winter Games. “When Mr. Romney finally set up shop just across the hall from Bain consulting in 1984, his initial plan centered on providing venture capital – seed money –

for ideas spun off by Bain consultants. ... By the time Mr. Romney left the firm in 1999, the investments it had sold off had made enough money to deliver an average annual return that amounted to as much as 100 percent before fees, several of its investors said.” (David Kirkpatrick, “Romney Political Fortunes Tied To Riches He Gained In Business,” *The New York Times*, 6/4/07)

Romney Served As CEO Of Bain Capital Through August 2001, Even Though He No Longer Ran Daily Operations. “Although he gave up running day-to-day operations at the venture capital firm in order to head the Salt Lake Winter Olympics, he remained CEO and held his financial interest in the company through August 2001.” (Stephanie Ebbert and Yvonne Abraham, “Camps Spar Over Romney Word Choice,” *The Boston Globe*, 10/31/02)

Bain Capital Is “Remains Romney’s Creation” As Over Three-Quarters Of Its Partners Came On Board During Romney’s Tenure, Joining The “Corporate Culture ... He Nurtured Over 17 Years.” “Bain Capital remains Romney’s creation. The corporate culture is one he nurtured over 17 years. A *Herald* analysis of the firm’s leadership shows that more than three quarters of the managing partners joined when he was the boss.” (Brett Arends, “American Workers’ Bane,” *Boston Herald*, 6/22/05)

Romney: “I’m Basically In The Investors’ Hall Of Fame.” (John McElhenny, “Romney, O’Brien Spar At Gubernatorial Debate,” *The Associated Press*, 10/25/02)

Romney Relies On Employees At Bain Capital And Bain & Co. For Sizeable Campaign Contributions

Employees At Bain Capital And Bain & Co. Donated Over \$171,000 To Romney’s Campaign In The First Three Months Of 2007. According to the Center for Responsive Politics, persons affiliated with Bain Capital donated at least \$99,800 to Romney’s campaign in the first quarter of 2007 and he received another \$71,250 from employees of Bain & Co. (Center For Responsive Politics Website, www.opensecrets.org, Accessed 6/15/07)

“Republican Mitt Romney Received Almost \$100,000 From Staff At Bain Capital, The Private Equity Group That The Former Governor Of Massachusetts Founded.” (Alex Barker, “New Tycoons Are Taking A Not Entirely Altruistic Interest,” *Financial Times*, 5/30/07)

Bain Executives Also Donated Tens Of Thousands Of Dollars To Support Romney’s Pre-Presidential Campaign Activities. “[R]ecords of Mr. Romney’s political action committees indicate that he also accumulated a valuable Rolodex during his years at Bain. Executives of Bain Capital and its sister firm, Bain Consulting, contributed more than \$64,000 over the last two years to Mr. Romney’s federal political action committee, Commonwealth PAC, and in 2002 they gave more than \$14,000 to his campaign for governor.” (David D. Kirkpatrick, “Romney Reaps \$20 Million To Top G.O.P. Rivals,” *The New York Times*, 4/3/07)

Romney’s Background As CEO And Corporate Dealmaker Seen As Influence On His Political Tactics

Romney’s “Flip-Flops And Business Success” Are Connected Because “Abandoning Deeply Held Attitudes And Reversing Positions Are Job Requirements” For CEOs. “So, how are Romney’s flip-flops and business success connected? People suspect, perhaps correctly, that Romney really doesn’t believe all the things he’s saying. ... [S]uch hypocrisy, which turns off voters, is something like a job requirement for CEOs. In the executive suite, abandoning deeply held attitudes and reversing positions are job requirements. How often have you seen a CEO proclaim that a struggling unit is not for sale, only to put it on the block a few months later? A CEO will praise a product to the skies one day and then cancel it the next. He’ll boast, sincerely, that his company is No. 1 in the industry and then, when he quits the next day to run a rival, claim that the new firm is tops.” (Daniel Gross, “The CEO Candidate,” *Slate.com*, 2/26/07)

“Good CEOs ... Devise New Business Strategies And Business Plans To Cope With Changing Market Conditions.” “These business flips are fine, because in the corporate world, people don’t confuse advocacy of a company’s strategy or products and services with personal honor or integrity. ... Good CEOs don’t simply stake out public positions and stick to them for 20 years. They devise new business strategies and business plans to cope with changing market conditions.” (Daniel Gross, “The CEO Candidate,” *Slate.com*, 2/26/07)

Romney “Doesn’t Run In Elections, He Competes In Markets.” “It is clear that Romney approaches politics not as a crusade but as a business case study. He doesn’t run in elections, he competes in markets. In 1994, the former management consultant knew his market. ... Today, Romney correctly recognizes that what is appropriate for one market (Massachusetts voters) clearly is not appropriate for another market (Republican-primary voters).” (Daniel Gross, “The CEO Candidate,” *Slate.com*, 2/26/07)

Romney's Business Acumen Was "Forged In The Often-Overheated 1980s." "An examination of Romney's nearly 20-year business career in Boston – as a consultant, venture capitalist, entrepreneur and chief executive – shows a man whose uncanny ability to smell a deal, take a risk and turn a profit was forged in the often-overheated 1980s." (Mitchell Zuckoff and Ben Bradlee Jr., "Romney's Business Record Gives Larger Picture," *The Boston Globe*, 8/8/94)

As CEO, Romney "Insisted On Having Almost Dictatorial Powers. ... That Was Essential." "The Boston-based venture capitalist likes to be in control. '(At SLOC) I don't have the kind of control I'm used to in the business world,' he said. 'When I was involved in (the resurrection of the beleaguered international firm Bain Consulting), I insisted on having almost dictatorial powers. ... That was essential.'" (Lisa Riley Roche, "Mitt Exemplifies The New Openness Sought For SLOC," *Deseret News*, 2/12/99)

Former Business Colleague Said Romney Possessed "Ability To Identify People's Insecurities And Exploit Them To His Own Benefit." "[S]ome colleagues found Romney to be manipulative. Romney had an 'ability to identify people's insecurities and exploit them to his own benefit,' says a source who worked with Romney but refused to be quoted for 'fear of retribution.' This source says that Romney would vary bonuses among his partners just enough to put people on edge, giving \$3.1 million to one, \$3 million to another and \$2.9 million to another." (Evan Thomas et al, "Is Mitt Romney Ready For Prime-Time Politics?" *Newsweek*, 4/16/07)

Romney, On His Business Record: "I Won The Lottery ... I Was Absolutely In The Right Place At The Right Time." "Romney said he can afford to do this because 'I won the lottery. I got into something called venture capital just when the stock market went from, I don't know, a couple thousand to almost 10,000. I was absolutely in the right place at the right time.'" (Lisa Riley Roche, "Mitt Exemplifies The New Openness Sought For SLOC," *Deseret News*, 2/12/99)

Under Romney's Leadership, Bain Capital Had History Of Relentless Focus On Bottom Line, Improving Corporate Profits At Expense Of Local Workers

Under Romney's Stewardship, "Bain Left Companies In Bankruptcy Or Near Collapse After Selling Off Its Interests And Made Huge Profits." "Romney was tremendously successful as CEO of Bain Capital and he helped build many companies. But his work also involved controversial ventures ... that resulted in downsizing or layoffs. In some cases, Bain left companies in bankruptcy or near collapse after selling off its interests and made huge profits. Some companies Bain invested in, such as American Pad & Paper of Dallas, Stage Stores of Houston, and Dynamic Details (DDI) of Orange County, Calif., crashed after Bain went public with the company's stock, and then immediately sold its own interest." (Frank Phillips, "Romney Profited On Firm Later Tied To Fraud," *The Boston Globe*, 10/10/02)

- **Bain Culture: "Possessed By A Mission To Increase The 'Total Economic Value' Of Their Clients."** "Notoriously secretive about itself and its work for clients, Bain has over the years been labeled the 'KGB of Consulting' ... Bain consultants seem possessed by a mission to increase the 'total economic value' of their clients. Like religious zealots, they single-mindedly dedicate themselves to improving their customer's competitive position. Business is a holy war that the client must win and the competition must lose." (Nancy Perry, "A Consulting Firm Too Hot To Handle?" *Fortune*, 4/27/87)

"Bainies" Were Known For Company Songs And Secrecy, Compared To KGB. "Bain & Co. also was known for the strict discipline, team spirit - including company songs - and relentless work ethic of its troops. With their uniforms of white shirts and red power ties, the clean-cut Bain consultants were known as 'Bainies,' a knockoff of the term 'Moonies' for followers of Rev. Sun Myung Moon. Bain & Co. also was known for its secrecy, earning sobriquets like 'the KGB of consulting.'" (Mitchell Zuckoff and Ben Bradlee Jr., "Romney's Business Record Gives Larger Picture," *The Boston Globe*, 8/8/94)

- **Code Names And More:** "From the beginning, Bain cultivated a mystique around the secretive firm, which was once dubbed 'the KGB of consulting.' Partners didn't carry business cards and referred to clients by code names. ... And it inculcated in the recruits such a sense of mission that young consultants became known as Bainies, a reference to the Unification Church's Moonies." (Paul Hemp, "Did Greed Destroy Bain & Co.?" *The Boston Globe*, 2/26/91)

Bain Got "Their Hands Deep Into The Trousers Of A Company," According To One Executive. "How could a respected, albeit highly aggressive, firm like Bain have left itself open to being tainted by the scandalous behavior of a client? The answer may lie in Bain's approach to business: 'They get their hands deep into the trousers of a company,' says an executive who knows the firm well." (Nancy Perry, "A Consulting Firm Too Hot To Handle?" *Fortune*, 4/27/87)

- **“Like Religious Zealots ... Business Is A Holy War That The Client Must Win And The Competition Must Lose.”** “Notoriously secretive about itself and its work for clients, Bain has over the years been labeled the ‘KGB of Consulting,’ or a ‘Moonie commune’ run by the ‘Reverend’ Bain. Bain consultants seem possessed by a mission to increase the ‘total economic value’ of their clients. Like religious zealots, they single-mindedly dedicate themselves to improving their customer’s competitive position. Business is a holy war that the client must win and the competition must lose.” (Nancy Perry, “A Consulting Firm Too Hot To Handle?” *Fortune*, 4/27/87)
- **“Stand Aside, Asshole. Here We Come.”** “The real problem for Bain & Co., though, may be the firm’s tendency to alienate and weaken lower-level managers at the companies where it works. ... Notes the chairman of another management consulting firm: ‘Their product is brilliant. It’s the package that has been a problem. Five million Bainies saying, ‘Stand aside, asshole. Here we come.’” (Nancy Perry, “A Consulting Firm Too Hot To Handle?” *Fortune*, 4/27/87)

Romney “Often” Tapped Bain Partners For Management Roles In Bain Capital-Funded Companies, Raking In Millions In Fees For Bain & Co. “Romney still works very closely with his old company, often hiring Bain partners to take over management of the outfits he invests in. Last December Bain Capital Partners paid \$2 million for a 40% stake in GS Roofing Products, a division of GenStar Inc., which lost in excess of \$10 million in 1986. The company, under direction of majority stockholders Berkshire Partners, immediately hired – you guessed it – Bain & Co. to try to stem the losses. Fees so far: close to \$2 million.” (Laura Jereski, “Putting It On The Line,” *Forbes*, 11/30/87)

Romney Blasted Critics Of Bain Management Style For “Naivete,” Claiming “There Is Nothing Wrong With Companies ... Trying To Make Money” And “This Is Not Fantasy Land.” “Romney said yesterday that layoffs can be a part of doing business. ‘This is not fantasy land,’ said Romney. ‘This is the real world and in the real world there is nothing wrong with companies trying to compete, trying to stay alive, trying to make money.’ ... ‘Clearly there is a naivete which sometimes exists in people who have not been in the real world, working with real businesses with real competition trying to keep jobs and businesses alive,’ Romney said. ‘They live in a never-never land where not all businesses get better, not all businesses grow.’” (Frank Phillips, “Romney Firm Tied To Labor Fight,” *The Boston Globe*, 9/23/94)

Romney Defended Layoffs At Bain Capital-Controlled Indiana Paper Plant In 1994. “In July 1994, Ampad [a paper company Bain Capital controlled] bought an Indiana paper plant, fired the existing workers, and gave most employees their jobs back at reduced wages and benefits. Even though Romney was on leave from Bain for the campaign, the workers came to Massachusetts and dogged his campaign. Romney initially tried to justify the layoffs, defending them as necessary in corporate restructuring.” (Stephanie Ebbert, “Romney Seeks High Office With Confidence, Pedigree,” *The Boston Globe*, 8/14/02)

Bain Capital Called “Bully On The Block,” Blamed For Closing Of Kansas City Steel Plant In 2002. “Out-of-work steelworkers in Kansas City, for example, blame Romney and Bain Capital for decisions that led to last year’s bankruptcy of a steel mill that opened its doors in 1888. Bain bought the operation, GST Steel Co., in 1993. Workers said the new owners cleaned house and brought in an inexperienced management team. Dan Misel, who worked at GST Steel for 35 years, said Bain came in ‘like the bully on the block,’ assuming its managers knew how to run the operation better than anyone already in place. ... In 1997, two years before Romney left Bain to run the Winter Olympics, the Kansas City plant endured its first strike in four decades. After a 10-week walkout, union officials said they offered to work with managers to improve the plant’s competitiveness, but that the Bain-imposed managers weren’t interested. ... When the plant closed earlier this year, amid a generally gloomy climate for US steel companies, workers lost severance packages and health insurance coverage.” (Thomas Farragher and Scott Bernard Nelson, “Business Record Helps, Hinders Romney,” *The Boston Globe*, 10/24/02)

BAIN CAPITAL AND DREXEL BURNHAM

Romney Used Drexel Burnham Junk Bonds To Finance 1988 Leveraged Buyout, Right Around The Time SEC Officials Were Taking Formal Action Against The Company

Bain Capital Financed Mid-1988 Deal With Junk Bonds Issued By Drexel Burnham And Notorious Financier Michael Milken. “Sometimes, when Bain Capital was looking to make a deal, the bulk of the money came not from its investors but from other sources, such as junk bonds. In 1988, for instance, Bain Capital decided to buy two Texas department store chains, Bealls and Palais Royale, in a deal valued at \$300 million. To fund the purchase, Bain sought out Drexel Burnham corporate financiers, based in Boston, who were working

under junk bond impresario Michael Milken. Romney and the Bain Capital partner who oversaw the deal, Joshua Bekenstein, said they never dealt with Milken.” (Mitchell Zuckoff and Ben Bradlee Jr., “Romney’s Business Record Gives Larger Picture,” *The Boston Globe*, 8/8/94)

Two Months After Hiring Drexel, The SEC Filed Extensive Complaint Alleging Insider Trading And Market Manipulation – Romney Defended The Decision To Keep Using Drexel In Transaction. “On Sept. 7, 1988 - roughly two months after Bain Capital hired Drexel to issue junk bonds - the Securities and Exchange Commission filed a 184-page complaint against Drexel, Milken and others alleging insider trading schemes, manipulation of stock prices and other violations of federal securities laws. Bain Capital was put in the position of trying to close a deal with junk bonds from a company being sued by the SEC. Romney and Bekenstein defended their decision to hire Drexel before the SEC suit – at a time when rumors of the investigation were rife on Wall Street – as well as after the suit was filed.” (Mitchell Zuckoff and Ben Bradlee Jr., “Romney’s Business Record Gives Larger Picture,” *The Boston Globe*, 8/8/94)

- **Romney:** “We did not say, ‘Oh my goodness, Drexel has been accused of something, not been found guilty. Should we basically stop the transaction and blow the whole thing up?’” (Mitchell Zuckoff and Ben Bradlee Jr., “Romney’s Business Record Gives Larger Picture,” *The Boston Globe*, 8/8/94)

Romney And Bain Capital Continued Using Drexel Burnham To Refinance Bonds Well After SEC Suit Was Initiated. “Romney and Bekenstein said their main concern was whether the suit would damage Drexel so badly that it would be unable to sell the bonds for Bain Capital. As it turned out, the bonds sold quickly. Bain Capital then refinanced the bonds, also with Drexel, in mid-1989. Of 59 Bain Capital deals, only one involved Drexel.” (Mitchell Zuckoff and Ben Bradlee Jr., “Romney’s Business Record Gives Larger Picture,” *The Boston Globe*, 8/8/94)

Romney Later Reminiscenced About “The Glorious Days Of Drexel Burnham,” Saying “It Was Fun While It Lasted.” “The deal that jump-started Bain’s business came along in 1986, a \$200 million buyout of Accuride Corp., the wheel and rim manufacturing unit of Firestone Co., Phoenix. Bain financed the deal with just \$5 million of its own equity and borrowed the rest. Just 18 months later, Bain sold Accuride to Phelps Dodge Co. for \$320 million. Its return on its investment: \$130 million. ‘That was in the glorious days of Drexel Burnham,’ Mr. Romney recalled. ‘It was fun while it lasted, but fortunately, it came to an end.’” (Jennifer Goldblatt, “Boston Buyout Firm Cashes In by Adding Value,” *The American Banker*, 12/23/97)

BAIN & CO. AND IRAN

Bain & Company Was Hired By Iran’s National Oil Company In 2004 To Conduct Efficiency Study

In 2004, Bain & Co.’s Italian Branch Was Hired By National Iranian Oil Company To Conduct Study On “How To Make The Bureaucratic State Company More Efficient.” “[A]s oil minister, Bijan Namdar Zanganeh, an ally of powerful former president Ali Akbar Hashemi Rafsanjani, in the late 1990s pushed through billions of dollars in agreements with Shell, France’s Total, Italy’s Eni, Schlumberger and Halliburton to develop large and technically challenging projects, such as Iran’s huge South Pars field, which is believed to hold 7% of the world’s natural gas supply. ... [National Iranian Oil Company] once tried to put on more of a Western face. Zanganeh planned to streamline it along the lines of, say, Shell, and even hired Bain & Co. Italy to conduct a \$2.3 million study on how to make the bureaucratic state company more efficient. Bain & Co., headquartered in Boston, says its independent Italian unit did the work and no U.S. sanctions were violated.” (Daniel Fisher, “Running Dry,” *Forbes*, 7/3/06)

- **Bain & Company Italy – “The Italian Branch Of Bain & Company” – Opened In 1989 And Has Grown “To Become One Of Bain’s Leading Offices Worldwide.”** “Bain & Company Italy, the Italian branch of Bain & Company, opened in Milan in 1989. Over the years, Bain & Company Italy has grown to become one of Bain’s leading offices worldwide and the leader in strategic management consulting in Italy. Today Bain & Company Italy has 350 professionals and intends to further develop its success. Being part of an international group allows us to manage clients and projects at a multinational level, to develop practices and global themes, and to access information, research and supporting databases from Bain’s worldwide network. Our offices share Bain’s approach, values and experiences.” (Bain & Co. Website, www.bain.com, Accessed 2/22/07)
- **Bain & Company Italy Listed In “Contact Us” Section Of Main Bain & Company Website.** (Bain & Co. Website, www.bain.com, Accessed 2/22/07)

Romney Served A Stint As CEO Of Bain & Co. In The Early 1990s. “Bain & Co. said that it completed a financial restructuring and transfer of ownership from eight top-ranking partners to 75 senior partners. Concurrent

with the transaction, W. Mitt Romney will become chief executive officer of the Boston-based international management consulting firm. Romney has provisionally held that position since January.” (Paul Hemp, “Restructure At Bain Is Completed,” *The Boston Globe*, 6/19/91)

DAMON CLINICAL LABORATORIES

Romney Was Board Member Of Company Fined Over \$100 For Medicare Fraud – At The Time, It Was The Largest Criminal Fine For Health Care Fraud In History

Romney Sat On Board Of Damon Clinical Laboratories, A Bain Capital Portfolio Company Fined Nearly \$120 Million In 1996 Due To Medicare Fraud. “A Needham clinical laboratory agreed yesterday to pay \$119 million in criminal and civil fines after pleading guilty to charges that it defrauded the nation’s Medicare system by seeking reimbursements on millions of dollars worth of unnecessary blood tests. ... Damon Clinical Laboratories Inc. admitted it tried to boost its profits by submitting the unnecessary tests. The company, the government said, misled doctors into ordering the tests, ensuring that they would be covered by Medicare, the federal health care program for the elderly.” (Kimberly Blanton, “Needham Lab Fined \$ 119m For Fraud,” *The Boston Globe*, 10/10/96)

- **At The Time, Largest Criminal Fine In Massachusetts History:** “The settlement ... would mark the largest criminal fine ever levied in Massachusetts.” (Kimberly Blanton, “Needham Lab Fined \$ 119m For Fraud,” *The Boston Globe*, 10/10/96)
- **At The Time, Largest Health Care Fraud Criminal Fine In History:** “The \$35.3 million criminal fine in the Damon case, one piece of the \$119 million total settlement, is the largest ever recovered in a health care fraud case.” (Kimberly Blanton, “Needham Lab Fined \$ 119m For Fraud,” *The Boston Globe*, 10/10/96)

Romney Was On Damon’s Board Of Directors While The Fraud Took Place – He Initially Claimed He Was Unaware Of Any Criminal Investigation. “Mitt Romney, former Republican challenger to US Sen. Edward M. Kennedy, who was a member of Damon’s board, said he was unaware of any investigation. ... Romney said that [Damon’s then-CEO Robert] Rosen told the board in about 1992 ‘that all current practices at the company were now in conformity with government regulations and that in the past there may have been practices which would not be deemed appropriate.’” (Kimberly Blanton, “Needham Lab Fined \$ 119m For Fraud,” *The Boston Globe*, 10/10/96)

- **“Made Large Profits ... From A Criminal Scheme To Fraudulently Bill The Federal Medicare System...”** “[Romney] and his venture capital firm made large profits from the 1993 sale of a Needham medical testing company whose robust revenues were generated in part from a criminal scheme to fraudulently bill the federal Medicare system for unnecessary blood tests.” (Frank Phillips, “Romney Profited On Firm Later Tied To Fraud,” *The Boston Globe*, 10/10/02)
- **“Pure And Simple ... Corporate Greed Run Amok.”** “Damon Corp. pleaded guilty in 1996 to a federal conspiracy charge of defrauding the government of \$25 million between 1988 and 1993. It paid a record \$119 million fine and penalty for a scheme that then-US Attorney Donald Stern labeled ‘a case, pure and simple, of corporate greed run amok.’” (Frank Phillips, “Romney Profited On Firm Later Tied To Fraud,” *The Boston Globe*, 10/10/02)

1993: Immediately Following Acquisition By Corning, Damon Closed Plant In Needham Heights, Laid Off 115 Massachusetts Workers. “Republican businessman Mitt Romney ... helped direct a Massachusetts medical diagnostics company toward a merger that resulted in the permanent closure of a Needham Heights plant and layoffs of about 115 Massachusetts workers. Damon Corp. was headquartered in Massachusetts for more than 30 years until it was purchased by Corning Inc. in 1993 and the Needham facility was closed. ... The day after the merger with Corning was completed, the new company notified the Massachusetts Department of Employment and Training that it was permanently closing the Needham plant and laying off about 115 people.” (Meg Vaillancourt, “Romney-Aided Deal Closed Damon Plant,” *The Boston Globe*, 10/9/94)

- **Romney “Feared” The Massachusetts Layoffs Would Come, But Voted To Approve Deal Anyway.** “As a board member, Romney pointed out he had a legally binding ‘fiduciary responsibility’ to get the best deal he could for the shareholders, though he acknowledged that at the time he feared Corning would close down the plant and lay off the Massachusetts employees. ... No one met Corning’s tender offer, which Romney described as ‘stunning.’ He said he voted to accept the offer, as did the vast majority of other shareholders. ‘There was nothing I could do.’” (Meg Vaillancourt, “Romney-Aided Deal Closed Damon Plant,” *The Boston Globe*, 10/9/94)

As A Gubernatorial Candidate, Romney Claimed He Helped “Uncover” And Stop The Fraud At Damon. “[R]omney said Thursday he helped uncover the fraud at Damon and hired an outside law firm to investigate it.

'We took action based on what was told to us by the law firm,' Romney said ..." (Ron DePasquale, "Romney Downplays Report He Profited From Firm Tied To Fraud," *The Associated Press*, 10/10/02)

- **Romney Tries To Take Credit:** "Mr. Romney said yesterday that he aided in uncovering and stopping the fraud one year before the sale. ... Mr. Romney said board members, including himself ... had started an inquiry that led to the disclosure." (John Monahan, "Ex-Presidents Stump For O'Brien, Romney," *Telegram & Gazette* [Worcester, MA], 10/11/02)
- **"Romney Has Said He Helped Uncover The Fraud But Never Reported It To Authorities."** (Tom Benner, "O'Brien Sees Savings Possible In Budget," *The Patriot Ledger* [Quincy, MA], 10/23/02)

Federal Investigators Rebuffed Romney's Claims, Saying The Fraud Continued Until Bain And Other Owners Sold Damon To Corning In 1993. "A spokesman for Romney, Eric Fehrstrom, said Thursday that Romney and other board members helped uncover the fraud at Damon after similar fraudulent practices were found at another laboratory in 1992. ... But court records, including statements by prosecutors and by Damon officials, indicated that the fraud continued until Corning purchased the firm. Prosecutors gave Corning sole credit for cleaning up the fraud." ("Report: Mass. Candidate Romney Profited From Sale Of Firm That Later Admitted Medicare Fraud," *The Associated Press*, 10/10/02)

- **"Federal Officials ... Have Disputed Mr. Romney's Claim That He Helped Stop And Correct The Practice."** "Mr. Romney was a director from 1990 to 1993 and said he and the board of directors learned of the problem in 1993 when its own legal staff investigated the billings. Federal officials who prosecuted the case have disputed Mr. Romney's claim that he helped stop and correct the practice, saying the company did not report the fraud to federal authorities and the practice was stopped by the company's new owners after it was sold." (John Monahan, "Romney Talks To Crowd At Fallon," *Telegram & Gazette* [Worcester, MA], 10/12/02)
- **"No Corrective Action Was Taken When Romney Was On The Board..."** "In the 1996 settlement, records show the [fraud] scheme was carried out between 1988 and the time that Damon was sold, indicating that no corrective action was taken when Romney was on the board and served as a member of its strategic planning committee." (Frank Phillips, "Romney Profited On Firm Later Tied To Fraud," *The Boston Globe*, 10/10/02)
- **Officials Gave Corning Sole Credit For Cleaning Up Damon's Fraudulent Practices.** "[C]ourt documents – and Damon's admission – reveal that the fraudulent activity was occurring right up until the time Corning purchased the company from Bain and other owners. ... [D]amon's filings with the federal Securities and Exchange Commission during the weeks and months just prior to the sale contain no mention of possible legal problems over its billing system, or potential negative impact that would require downward revenue revisions." (Frank Phillips, "Romney Profited On Firm Later Tied To Fraud," *The Boston Globe*, 10/10/02)

"Damon's Activities Cost US Taxpayers Nearly \$40 Million, The Government Said." (Kimberly Blanton, "Needham Lab Fined \$ 119m For Fraud," *The Boston Globe*, 10/10/96)

Romney Personal Profit From Bain's Sale Of Damon: More Than \$470,000. "Republican gubernatorial candidate Mitt Romney and his venture capital firm made large profits from the 1993 sale of a Needham medical testing company whose robust revenues were generated in part from a criminal scheme to fraudulently bill the federal Medicare system for unnecessary blood tests. Romney personally made \$473,000 when Corning Inc. purchased Damon Corp., on whose board he served between 1990 and 1993." (Frank Phillips, "Romney Profited On Firm Later Tied To Fraud," *The Boston Globe*, 10/10/02)

- **Romney Earned Nearly \$40,000 In Directors' Fees Alone.** "Romney's firm, Bain Capital, and Romney himself were minority investors in Damon from 1990 through August 1993. The Belmont businessman sat on Damon's board of directors, earning nearly \$40,000 in directors' fees, and was a member of the company's strategic planning committee when Damon was sold to Corning." (Meg Vaillancourt, "Romney-Aided Deal Closed Damon Plant," *The Boston Globe*, 10/9/94)

Bain Capital Tripled Its Investment On The Deal: "[Romney's] firm, Bain Capital, tripled its initial investment, making a profit of \$7.4 million over a four-year period for its investors, according to copies of Bain documents obtained by the *Globe*." (Frank Phillips, "Romney Profited On Firm Later Tied To Fraud," *The Boston Globe*, 10/10/02)

Romney "Proud" Of Role With Damon. "'I'm proud of the small part I played in the growth of Damon,' Romney said yesterday. 'It's something that Ted Kennedy doesn't have a clue about – creating real jobs in the private sector.'" (Meg Vaillancourt, "Romney-Aided Deal Closed Damon Plant," *The Boston Globe*, 10/9/94)

AMPAD

Romney's Firm Owned Company Named Ampad That Purchased Indiana Paper Plant, Fired Its Workers And Offered To Bring Them Back At Drastically Reduced Salary And Benefits

In 1994, Bain Capital-Controlled Company Named Ampad Bought An Indiana Paper Plant And Promptly Laid Off Hundreds Of Workers – Firings Became An Issue In Romney's Senate Race. "Romney's business background became a liability in his unsuccessful 1994 challenge to US Senator Edward M. Kennedy ... The issue erupted over Ampad Corp., a paper company Bain Capital controlled. In July 1994, Ampad bought an Indiana paper plant, fired the existing workers, and gave most employees their jobs back at reduced wages and benefits." (Stephanie Ebbert, "Romney Seeks High Office With Confidence, Pedigree," *The Boston Globe*, 8/11/02)

- **Layoffs Came On Top Of Wage And Benefit Cuts, "Sparking A Bitter Strike."** "Bain owned 80 percent of Ampad when it bought the Marion plant in July 1994, slashing wages, cutting benefits and sparking a bitter strike. Workers were fired and forced to re-apply for their old jobs at less money." (Andrew Miga, "Plant Workers May Resurface," *Boston Herald*, 4/4/02)

After First Defending Layoffs, Romney Later Tried To Convince Striking Workers He Was Not Involved By Showing Them Flowchart Of Bain Capital Management Structure. "Romney initially tried to justify the layoffs, defending them as necessary in corporate restructuring. Prodded by the workers to meet with them in Boston, Romney eventually did so, but even then, he further distanced himself, showing a diagram of Bain Capital's corporate structure, claiming he was not to blame." (Stephanie Ebbert, "Romney Seeks High Office With Confidence, Pedigree," *The Boston Globe*, 8/11/02)

Romney Claimed He Was On Leave From Bain Capital When Ampad Layoffs Began, But Former Bain Executive Said Romney Bore Responsibility. "In 1994, Romney tried to distance himself from the Ampad controversy, since he was on a leave of absence during the initial downsizing. But [former Bain Capital executive and Ampad board member Marc] Wolpow, who came to Bain in 1990 from Drexel Burnham, the infamous junk bond company, says: 'I reported directly to Mitt Romney ... You can't be CEO of Bain Capital and say, 'I really don't know what my guys were doing.'" And what were Romney's guys doing? 'My job was to maximize the profits to Bain Capital's partners from the Ampad transaction,' says Wolpow..." (Joan Vennoch, Op-Ed, "Questions Romney Shouldn't Dodge," *The Boston Globe*, 10/24/02)

Three Months After Plant Controversy Roiled 1994 Election, Ampad Decided To Close The Plant Altogether

Union Officials Say Romney Was Running Bain Capital When The Plant Ultimately Closed In February 1995. "Workers blamed Romney for shutting down the Ampad plant in Marion, Ind., three months after he lost to Sen. Edward M. Kennedy (D-Mass.), eliminating some 200 jobs and sowing misery for hundreds of families. ... [U]nion officials said Romney returned to Bain after the Nov. 8 election and was there when the plant closed Feb. 15, 1995." (Andrew Miga, "Plant Workers May Resurface," *Boston Herald*, 4/4/02)

Candidate Romney Promised He Would Look Into Workers' Complaints After The Election, Then Sat By As Ampad's Board (40% Of Which Answered To Him) Voted To Close The Plant. "Romney was routed despite promising the Indiana workers that he would 'look into' their complaints after the election. So when Ampad's five-member board, two of whom answer to Romney via Bain Capital, voted to give up and let the paper plant close, the defeated candidate felt little need to make noise on labor's behalf. 'That was a local decision made on local merits,' he said after the Ampad plant received its death warrant. 'My record on creating jobs here in Massachusetts speaks well for itself.'" (Tom Mashberg, "Romney Backers, Foes Spar Over Plant Closing," *Boston Herald*, 2/21/95)

Then-State AFL-CIO Head Joseph Faherty Promised He Would Remember Romney's Actions And "Expose His Record For The Sham It Is." "If payback is sweet, then Mitt Romney enjoyed his with extra icing last week when the 250 Indiana unionists who helped scuttle his Senate bid finally saw their own jobs go under. ... Joseph C. Faherty, head of the state's AFL-CIO, [indicated] that the political payback could keep going around, and coming around. 'Romney has exacted the final retribution against Ampad workers,' he said. 'Should he decide to seek office in the future, we will be there to expose his record for the sham it is.'" (Tom Mashberg, "Romney Backers, Foes Spar Over Plant Closing," *Boston Herald*, 2/21/95)

- **“The Plant Closed ... With Hardly A Whimper Of News. ‘We Won’t Forget,’ Faherty Said Yesterday. ‘Be Warned.’”** (Tom Mashberg, “Romney Backers, Foes Spar Over Plant Closing,” *Boston Herald*, 2/21/95)

Ampad CEO Had No Doubt Romney Authorized “Rollup” Strategy That Cost Workers Their Jobs. “[Charles Hanson III] was CEO of Ampad from 1992 until 1998, when Bain asked for his resignation. Hanson said that though he had had no direct contact with Romney after Bain took over Ampad in 1992, it was clear to him that ‘any significant direction we received would certainly have been authorized by him.’ Bain Capital, he said, was interested from the start in a ‘rollup’ of Ampad, a consolidation of its resources that clearly involved the layoffs the workers decried yesterday. And Hanson said he had no doubt Romney approved of that strategy.” (Yvonne Abraham, “Workers Press Romney On Layoffs,” *The Boston Globe*, 10/29/02)

Ampad Went Public In 1996, Earning Bain Capital Over \$100 Million, Then Declared Bankruptcy Four Years Later

A Year After Indiana Paper Plant Was Shuttered, Bain Capital Made Over \$100 Million Profit By Bringing Ampad Public. “Ampad raised \$243 million when it went public in July 1996. Bain Capital earned \$107 million by selling its shares, a sizable profit over its initial \$5 million investment in 1992, according to a Bain Capital sales brochure obtained by *The Associated Press*. The document did not say how much Romney himself earned.” (John McElhenny, “Democrats Revisit Labor Deal That Hurt Romney In 1994,” *The Associated Press*, 10/22/02)

“In January 2000, Ampad Declared Bankruptcy.” (Joan Vennoch, Op-Ed, “Questions Romney Shouldn’t Dodge,” *The Boston Globe*, 10/24/02)

HAIER GROUP AND MAYTAG

Romney Touts Business Experience While Campaigning In Iowa, Says Jobs Are Leaving State

In February 2007 Des Moines Event, Romney “Touted His Experience In The Business World.” “Former Massachusetts Gov. Mitt Romney formally announced his run for president Tuesday in Iowa, promoting his status as a Washington outsider ... ‘If ever a time for innovation and transformation were needed in American government, it’s now,’ Romney said. ... At the Des Moines event, Romney touted his experience in the business world ...” (Lisa Rossi, “Romney Touts Values As He Unveils ‘08 Bid,” *Des Moines Register*, 2/14/07)

- **Romney TV Ad That Was Scheduled To Run In Iowa Called Him A “Business Legend.”** (Romney For President, “Romney for President Launches First Television Ads,” Press Release, 2/21/07)

Romney, In Dubuque Last August: “These Are Challenging Times For Iowa ... Jobs Are Leaving Iowa.” “Nussle made his comments Thursday night in Dubuque at a fundraiser that yielded about \$50,000 for the Nussle campaign. The keynote speaker was Massachusetts Governor Mitt Romney, a Republican who painted the same dim picture of Iowa’s economy that Nussle sketched. ‘These are challenging times for Iowa. You’ve figured that out. Jobs are leaving Iowa,’ Romney said.” (O. Kay Henderson, “Nussle: Iowa At Number Three On Act Not Good Enough,” *Radiolowa.com*, 8/16/06)

In 2005, Chinese Appliance Maker Haier Group, Working In Tandem With Bain Capital, Attempted – And Ultimately Failed – To Take Over Newton, IA-Based Maytag Corp.

Haier Embarked On \$1.3 Billion Takeover Bid For Iowa-Based Appliance Manufacturer Maytag. “For years, American workers have worried about losing their jobs to low-cost workers in China. Now a new trend is emerging that could be nearly as big: Wealthy Chinese companies are coming to the U.S. looking to swallow American companies whole. Maytag Corp., the maker of such quintessentially American products as Maytag refrigerators, Amana microwaves and Hoover vacuum cleaners, disclosed Monday night a \$1.28 billion takeover bid from a group led by Haier America Trading, a unit of China’s Haier Group.” (David Greising, “Chinese Firm Wants Maytag,” *Chicago Tribune*, 6/22/05)

- **Haier’s Effort Described As “One Of The Most High-Profile Attempts By A Chinese Company To Enter The U.S. Market.”** (John E. Morris and Shu-Ching Jean Chen, “Haier Retreats,” *The Deal*, 7/25/05)

In Attempted 2005 Buyout Of Maytag, Haier Teamed Up With Bain Capital. “Bain Capital, the venture capital firm that Romney started and made him a multimillionaire, teamed up with the Haier Group, a Chinese appliance maker that has a factory in Iran, in an unsuccessful 2005 buyout effort. The target of their \$1.28 billion bid – the

Maytag Corp., based in the lead presidential caucus state of Iowa.” (Glen Johnson, “Company’s Links To Iran Undercut Romney’s Call For Divestment,” *The Associated Press*, 2/23/07)

Haier Is A Mammoth, State-Controlled Company With Opaque Financial Structures, Undisclosed Ownership Interests, Ties To Communist Party Elites And Manufacturing Facilities In Iran

Observers Struggle To Discern Shareholding Structure Of Company – No Information About Haier’s Ownership Is Public. “Notwithstanding that deference by Haier’s press office to Qingdao officials, it’s not clear if Haier is government owned. Zhang, its CEO and top manager since 1984, has told foreign journalists in numerous interviews that it’s difficult to explain the shareholding structure of the company, and exactly who owns it. ... Technically, Haier is a ‘collective factory,’ a hybrid between state-owned enterprises and privately held corporations, according to a company spokesman in China. According to its Web site, it was founded by ‘street side’ governments, a layer of government one step beneath a city. But no information about its ownership is public.” (John E. Morris and Shu-Ching Jean Chen, “Haier Retreats,” *The Deal*, 7/25/05)

- **“Haier’s Ownership Structure And Finances Are Opaque...”** (David Barboza, “From China, A New Bid For Maytag And Status,” *The New York Times*, 6/22/05)
- **“Haier ... Is Privately-Managed But Still Controlled By The State ...”** (Francesco Guerrera And Richard McGregor, “Price Concerns A Factor In Haier Withdrawal,” *Financial Times*, 7/21/05)
- **Haier “Government-Owned And Based In Qingdao.”** “Haier America is the U.S.-based division of Haier Group, which is government-owned and based in Qingdao.” (“AMC, Loews Cineplex To Merge,” *The Kansas City Star*, 6/21/05)
- **“Haier Is A State-Owned Company That Controls Shanghai-Listed Qingdao Haier Refrigerator And Hong Kong-Listed Haier Electronics.”** (David Teather, “Hoover Is Next On China’s Wish List,” *The Guardian* (London, England), 6/22/05)

Haier Also Has A Manufacturing Presence In Iran. “Haier, which is based in the eastern Chinese city of Qingdao, was one of the first Chinese companies to expand internationally, setting up factories in Algeria, Mexico, Iran and Southeast Asia before it started up its first U.S. factory, in Camden, South Carolina, in 2000.” (Elaine Kurtenbach, “China Cos. Show Appetite For Brand Names,” *The Associated Press*, 6/22/05)

Haier “Largely Government-Owned” And A “Favorite” Of The Chinese Ruling Party. “Haier is also a consumer goods goliath. The company is still largely government-owned, but has a publicly listed division. ... The company, which has about 50,000 employees, is also a favorite of the Beijing government.” (David Barboza, “From China, A New Bid For Maytag And Status,” *The New York Times*, 6/22/05)

Haier’s Longtime CEO Was First Businessman Named To Communist Party’s Elite Central Committee. “[Haier’s] longtime chief executive, Zhang Ruimin, has even fashioned himself as a Chinese version of John F. Welch Jr., the hard-driving former chief of G.E. Mr. Zhang is the first businessman named to the Communist Party’s elite ruling committee, the Central Committee.” (David Barboza, “From China, A New Bid For Maytag And Status,” *The New York Times*, 6/22/05)

- **“[Haier] CEO Zhang, For Example, Doubles As The Company’s Internal Communist Party Secretary General...”** (John E. Morris and Shu-Ching Jean Chen, “Haier Retreats,” *The Deal*, 7/25/05)

Haier’s U.S. Spokesman Instructed By Chinese Superiors To Say The Company Does Not Comment On Anything. “[I]t was hard to get any information from or on Haier – unusual given that it was bidding for a public company. A woman at Haier’s U.S. headquarters says there is no press officer and that she is instructed to say that the company does not comment on anything. The information flow is only marginally better at the home office in Qingdao, in Shangdong province, where foreign journalists need clearance from the foreign affairs department of the local Qingdao government before the company will consider replying to written or e-mailed questions.” (John E. Morris and Shu-Ching Jean Chen, “Haier Retreats,” *The Deal*, 7/25/05)

Haier Wanted To Leverage Maytag’s Brand Identity While Shipping Manufacturing Jobs From Iowa To China

“If The Chinese Acquire Maytag With Bain Cash, They Would Be Expected To Cut Thousands Of U.S. Jobs And Move The Manufacturing To Cheaper Locations Back Home.” (Brett Arends, “American Workers’ Bane,” *Boston Herald*, 6/22/05)

Haier Expected To Have Moved Most Maytag Production From Iowa To China. “Haier would be expected to move production of most of Maytag’s branded products to China. Company officials have indicated an interest primarily in Maytag’s strong distribution and product-repair networks and not necessarily its brands.” (David Greising, “Chinese Firm Wants Maytag,” *Chicago Tribune*, 6/22/05)

- **Washington Post:** “Analysts saw Haier’s interests in Maytag as ... a deal that would have used the venerable U.S. brand name to sell machines that could be made in the Chinese company’s existing factories.” (Peter Goodman and Ben White, “Haier Withdraws Maytag Bid,” *The Washington Post*, 7/20/05)

Haier’s Business Plan “Envisaged ... Moving Manufacturing To Low-Cost China.” “Haier was also worried about the problems in implementing its business plan – which envisaged keeping Maytag’s sales and distribution teams in the US while moving manufacturing to low-cost China – in the face of opposition from a highly unionised workforce.” (Francesco Guerrera And Richard McGregor , “Price Concerns A Factor In Haier Withdrawal,” *Financial Times*, 7/21/05)

- **“Haier’s Initial Plan For Maytag Envisages Cutting Costs By Moving Its Manufacturing From Its US Base, While Investing In Maintaining The Brand And Sales Channels In America.”** (Richard McGregor and James Politi, “Haier Might Consider Joint Bid,” *Financial Times*, 6/15/05)
- **“Haier Could Leverage The Deal By Shipping Its Own Branded Appliances Through Maytag’s Distribution Channel.”** (David Greising, “Chinese Firm Wants Maytag,” *Chicago Tribune*, 6/22/05)
- **Newton [IA] Daily News Editor Peter Hussman Expressed Concern:** “We’ve got this thing hanging over us ... A lot of people feel that if Haier acquires Maytag there would be no chance of future production locally...” (Jeremy Grant And James Politi, “Haier Offer Casts A Chill Over Maytag Home Town,” *Financial Times*, 6/22/05)

Haier Interested In Shifting Production “Back To Its Far Cheaper Home Base” In China And Elsewhere. “Haier’s interest in Maytag would be far more in acquiring distribution and brand than more production facilities in the U.S. One advantage of a Chinese purchaser for the troubled U.S. maker is the ease with which it could shift production back to its far cheaper home base. ‘Paying workers \$40 an hour, you can’t compete with workers offshore who are paid \$4 a day. This fits the trend,’ says one banker.” (Dennis Berman and Henny Sender, “Private Equity Heavyweights To Join Haier Bid For Maytag,” *The Globe And Mail [Canada]*, 6/21/05)

- **“Haier Would Be Able To Significantly Reduce Maytag’s Costs By Shifting Production To Its Asian Factories.”** (David Teather, “Hoover Is Next On China’s Wish List,” *The Guardian* (London, England), 6/22/05)

Deal Had “Added Significance” Of Chinese Company Not Only Buying Legendary American Brand, But Also Moving Jobs Abroad. “Any move by Haier would be a politically fraught one. Manufacturing jobs such as the ones in Maytag’s Newton, Iowa, headquarters, have for years been moving abroad to Mexico and Asia. But there would be an added significance of a Chinese-based company arriving in the American Heartland only to move many or most of those jobs abroad.” (Dennis Berman and Henny Sender, “Private Equity Heavyweights To Join Haier Bid For Maytag,” *The Globe And Mail [Canada]*, 6/21/05)

History Of Maytag Is Part Of The Fabric Of Newton, Iowa

New York Times, On Newton: “Nearly Everyone ... Here Has A Maytag Memory.” “Nearly everyone along the streets here has a Maytag memory: the Maytag Queen being crowned in the Maytag Bowl amphitheater at Maytag Park; the arrival of the stackable washer and dryer; the way the company’s ‘suits’ from headquarters once prided themselves on knowing the names of all of their workers at the plant on the other side of town.” (Monica Davey, “With Loss of Maytag, Town Faces the Loss of Its Identity ,” *The New York Times*, 6/7/06)

Former And Current Maytag Workers React To News Of Impending Closing Of Maytag Plant In 2006

40-Year Maytag Worker Leland Smith: “Everything That Has Happened Here Has Depended On Maytag.” “In the cool, echoey halls of the history museum in this company town, the display cases are full of washing machines. ... In many ways, said Leland Smith, who guided a visitor through the exhibit halls, the story of the Maytag Company is the story of Newton. ... ‘Directly or indirectly, everything that has happened here has depended on Maytag,’ said Mr. Smith, 75, who, long before he began showing people around the museum, worked for some 40 years as an industrial engineer -- at Maytag, of course.” (Monica Davey, “With Loss of Maytag, Town Faces the Loss of Its Identity ,” *The New York Times*, 6/7/06)

Former Maytag Worker Craig Miller Sr.: “Like Everything Else, I Guess, They Went Corporate And You Were No More Than A Number, Period.” “‘That’s when it was more of a family business,’ said Craig Miller Sr., who retired as an electrician from the Maytag plant, whose wife still works there in sheet metal and whose father worked there briefly in 1946. ‘But as things progressed, like everything else, I guess, they went corporate and you were no more than just a number, period. That’s when it started going downhill.’ Mr. Miller said people in Newton had quietly fretted about what might become of Maytag as times got hard and competition was stiff. Suddenly, the company that had driven the town’s stability and spared it from forces, like the farm crisis, that every town nearby wrestled with seemed to have trouble of its own.” (Monica Davey, “With Loss of Maytag, Town Faces the Loss of Its Identity,” *The New York Times*, 6/7/06)

Laid-Off Maytag Worker Denny Hosting: “I Guess I’ll Go Back To Trimming Trees.” “Denny Hosting sat at another table, looking numb. Hosting isn’t retired. In fact, he’d gone to work at 7 a.m. to do what he always does, assemble front-loading Neptune washers. There’d been a big layoff two weeks ago. Then a bunch more got the word Friday. The only people left, he said, were the ones with the most seniority. Now they were left hanging, too. ‘The company had been laying people off around every three months,’ Hosting said. ‘Fifteen hundred over the last 18 months. I figured they’d do what the meatpacking plants have done for years. Shut it down, break the union, then start it back up. The only thing that shocks me is the permanent closing. I guess I’ll go back to trimming trees.’” (Marc Hansen, “Long-Expected Punch Still Subdues Newton,” *Des Moines Register*, 5/11/06)

18-Year Maytag Worker Tim Hartgers: “Where Else Am I Going To Find A Job That Pays That Well?” “Casualties include Tim Hartgers, 42, who has worked at the plant for 18 years. He is a sheet-metal worker, making between \$18 and \$19 an hour. Hartgers said he knew there was a chance the plant would close after Whirlpool bought it March 31. ‘There’s not a thing you can do about it,’ he said. ‘But where else am I going to find a job that pays that well?’” (William Ryberg, “Whirlpool To Newton: You Never Had A Chance,” *Des Moines Register*, 5/11/06)

Second-Generation Maytag Worker Rick Holmes: “At Least We Know Now.” “‘At least we know now,’ said Rick Holmes, who worked at Maytag, as did his grandfather. Mr. Holmes said he and his family were likely to move away, perhaps to somewhere in the South, depending on where he found work. Plenty of houses in town now have for-sale signs on them, and as Mr. [Craig] Miller, the Maytag retiree, lamented, ‘Who is going to buy any of them?’” (Monica Davey, “With Loss of Maytag, Town Faces the Loss of Its Identity,” *The New York Times*, 6/7/06)

Former Military Wife – And Current Maytag Wife – Manuela Holmes: “Maytag Always Took Care Of Their People, Or So We Heard. ... We’ve Moved So Many Times.” “All day, Manuela Holmes waited by the telephone, anxious for news about her family’s future. A military wife since age 19, Holmes has had to relocate every two or three years or so throughout her adult life. Then, seven years ago, her husband, Rick, retired from the military and took a job at Maytag’s headquarters in Newton. Holmes figured it would be a more stable life for the couple and their two children, now ages 13 and 18. ‘Maytag always took care of their people, or so we heard,’ she said. ... The thought of leaving Newton made her cradle her face in her hands. ‘We’ve moved so many times,’ she said. ‘This was our first place for seven years straight.’” (Jennifer Jacobs, “Uncertain Days Fill Their Futures,” *Des Moines Register*, 5/11/06)

38-Year Maytag Worker Curt Jackson: “What Will 1,000 People Do In This Town?” “Curt Jackson, who spent 38 years with Maytag, said it’s a little strange seeing the name ‘Whirlpool’ on his pension checks. He still cashed them, but it wasn’t the same. ... ‘They made all their money in Newton,’ Jackson said, ‘and now they tell us Newton is the problem. What will 1,000 people do in this town? They can’t all work at the racetrack.’” (Marc Hansen, “Long-Expected Punch Still Subdues Newton,” *Des Moines Register*, 5/11/06)

Former Maytag Worker Mary Cass: “This Has Been Really Stressful.” “Mary Cass was laid off a few months ago. Her husband was a supervisor. He took a buyout and went to Ohio for a job. Mary stayed back and tried to sell the house. In the meantime, her marriage fell apart. She was already starting over when the news came Wednesday. She’s taking classes at DMACC, studying to be an accountant and still trying to sell her house, which has been on the market for a year. The plant closing isn’t going to help. ‘There are so many homes for sale,’ she said. ‘I just lowered the price this week. This has been really stressful.’” (Marc Hansen, “Long-Expected Punch Still Subdues Newton,” *Des Moines Register*, 5/11/06)

Former Maytag Worker Joe Keeler: “There Are Going To Be A Lot More Houses On The Market.” “Joe Keeler’s former house in Colfax sits empty, as it has for months, with a for-sale sign out front and a price tag that’s been slashed three times. The most recent drop came last week, when Keeler – who left his mechanical engineering job at Maytag last November – heard that the factory and headquarters would shut down. ‘The first thought was: There are going to be a lot more houses on the market,’ said Keeler, who now lives near Milwaukee with his wife and young daughter.” (Bonnie Harris, “For Sale Very Soon: A Lot More Houses,” *Des Moines Register*, 5/14/06)

Third-Generation Maytag Worker Bill Hull: “Everyone At Work Was Kind Of Numb.” “Bill Hull was shocked but not crestfallen by Wednesday’s announcement that his job of 12 years would be gone by October 2007. ‘We’ve known for some time that this could happen, and I guess that’s the way we have lived our lives since the strike back in 2002,’ said Hull, who represents the third generation of his family to work at Maytag. His father, Don Hull, 57, of Knoxville, retired from Maytag a little more than nine years ago, after 30 years of service. Don Hull’s father, the late Beryl Hull, worked at Maytag at least 20 years before leaving the company in the mid-1970s. ‘Maytag has been a provider for many, many Hull and Walters families for years,’ Bill Hull said. ... [Hull] said the first thing he did after learning the plant would close was call his wife, Dawn, who stays home with their four children. ‘Everyone at work was kind of numb,’ he said.” (Juli Probasco-Sowers, “We Aren’t In Limbo Anymore,” *Des Moines Register*, 5/11/06)

Local Officials Reacted To News Of Maytag Plant Closure With Sadness And Disappointment

Newton Mayor Chaz Allen: Sense Of Disappointment At News Of Plant Closing. “‘When it comes down to it, this possibility has been on people’s minds ever since I’ve been here,’ said Chaz Allen, the mayor of Newton, who moved here six years ago. Still, that did not diminish the sense of disappointment and worry that Mr. Allen felt when he received a call from company officials on May 9 at 10:23 p.m. – a time that he says is etched in his memory.” (Monica Davey, “With Loss of Maytag, Town Faces the Loss of Its Identity,” *The New York Times*, 6/7/06)

Newton Daily News Editor Peter Hussman: Residents Are “Sorting Through The Rubble And Wondering What The Aftershocks May Be.” “For now, Newton is ‘sorting through the rubble and wondering what the aftershocks may be,’ said Peter Hussmann, the editor of The Newton Daily News. The signs are mixed in recent days: a new bank said it would come to town, Mr. Hussmann said, but a local printer, which had long done business with Maytag, announced that it would close. And if new companies do come, in a diversified economy, will any of them mean what Maytag meant? ‘I think that’s what Newton is trying to find out – what its identity will be,’ Mr. Hussmann said. ‘I don’t think our identity is formed yet. I think we’re looking for one.’” (Monica Davey, “With Loss of Maytag, Town Faces the Loss of Its Identity,” *The New York Times*, 6/7/06)

UAW Official Dennis Williams: “It’s Sad For The Community.” “A leader of the union representing Whirlpool’s Newton union on Thursday praised Gov. Tom Vilsack’s efforts to save former Maytag jobs in Newton. United Auto Workers Regional Director Dennis Williams doubts Iowa leaders had a serious chance to influence Whirlpool’s decision. ... He expressed bitterness about former Maytag Chairman Ralph Hake’s role in Maytag’s sale, which he felt many UAW members share ... ‘It’s sad for the community,’ Williams said. ‘Newton is a great community to live in. I have family there.’” (Dave Dewitte, “Leader Of Newton Union Praises Vilsack,” *The [Cedar Rapids, IA] Gazette*, 5/12/06)

STREAM INTERNATIONAL, INC.

Stream International Provided Outsourced Customer Support Services To Corporations

Stream Called “One Of The Bigger Players” In The Outsourced Call Center Industry. “Canton’s Stream International offers its call centers to corporations on an outsourced basis, and is one of the bigger players in the industry. The company employs 7,500 call center agents in nine countries, and last fall it bought a system that will allow its agents to interact with clients using VOIP technology.” (C.A. Soule, “Telco’s New Center Of Growth,” *Mass High Tech*, 4/30/01)

Bain Capital Invested In Stream International’s Predecessors As Early As 1993 And Held Majority Stake In Company From November 1999 Through October 2001

Bain Bought Corporate Software Inc. In 1993, Merged It With R.R. Donnelley & Sons Unit (With Bain Holding Minority Stake) In 1995 To Create Stream International; Bain Purchased Majority Stake In Stream In November 1999. “Bain’s Stream investment is an offshoot of the firm’s purchase of Corporate Software Inc., a supplier of software services, for \$94 million in late 1993. In 1995 Bain merged Corporate Software with R.R. Donnelley & Sons Co.’s global software services unit to create Stream International Holdings Inc. At that point, Donnelley owned 87% of Stream and Bain just 4%, according to a U.S. Securities and Exchange Commission filing. In early 1998 Stream spun off its Modus Media International unit, a supplier of supply-chain management services. Bain, which owns about 39% of Modus, bought out Donnelley’s holding in Stream for \$96 million in November 1999.” (David Carey and Sarah Cohen, “Solectron To Buy Bain Capital Unit,” *Daily Deal*, 9/25/01)

Bain Capital Became “Primary Equity Holder” In Stream After Borrowing Over \$82 Million To Finance LBO. “Lehman Brothers, acting as the sole lead arranger, administrative agent and syndication agent, launched

into the market at a bank meeting in New York on Oct. 13 an \$82.5 million credit facility for Stream International Inc. ... Proceeds from the deal will be used to fund the company's leveraged buyout by private equity investment firm Bain Capital Inc. Stream's primary equity owner is R.R. Donnelley & Sons Co., which owns 87% of the company. Once the transaction is completed, Bain Capital will become the primary equity holder in the company." ("Bain Taps Lehman For Stream LBO," *Bank Loan Report*, 10/25/99)

Bain Reportedly Paid \$96 Million To Acquire Majority Interest In Stream. "Stream International split off from its larger parent, now Modus Media International and Corporate Software, prior to the Bain VI investment in 1999. (However, Bain IV was already an investor in Modus Media since 1993, and still holds a 39% stake.) Bain purchased R.R. Donnelley & Sons Co.'s stake in Stream International for \$96 million." (Christa Fanelli, "Bain Capital Sends Company Upstream," *BuyOuts*, 10/8/01)

Bain's Total Capital Outlay In Stream Was Not Publicly Determined. "Bain's capital outlay in Stream isn't quantified in financial statements. The firm has received at least one capital distribution, of \$12.3 million, following its initial investment." (David Carey and Sarah Cohen, "Solectron To Buy Bain Capital Unit," *Daily Deal*, 9/25/01)

In October 2001, Bain Sold Its Majority Interest In Stream For What Was Assumed To Have Been A "Substantial Gain" For Bain Investors

Bain Capital Sold Its 60% Equity In Stream To Solectron Corporation For An Undisclosed Sum. "Boston-based Bain Capital last month agreed to sign off its investment in Stream International Inc., a customer care and technology support company for online and technology companies, to Solectron Corp. Terms of the deal, which is expected to close by the end of October, were undisclosed. Bain will be selling its full ownership stake of approximately 60% of the company." (Christa Fanelli, "Bain Capital Sends Company Upstream," *BuyOuts*, 10/8/01)

Bain "Probably" Turned Substantial Profit From Its Investment In Stream. "Although the magnitude of Bain's profit from the sale isn't clear, the firm will probably register a substantial gain considering Stream's recent performance. Kathleen Nordgren, a Stream press official, said that revenues climbed 36% from 1999 to 2000 and are on track to grow more than 20% this year. Stream's Ebitda, she said, is in the black. 'If the company weren't healthy, I doubt Solectron would have been interested in us,' she said." (David Carey and Sarah Cohen, "Solectron To Buy Bain Capital Unit," *Daily Deal*, 9/25/01)

Stream Experienced "Significant Growth" Under Bain's Management. "Under Bain's ownership, Stream International has seen significant growth, mainly through acquiring new clients and building up the accounts of existing clients. Last year the company, based in Canton, Mass., had \$323 million in sales. Kathleen Nordgren, a spokesperson for Stream International, said the company grew 'well over 30% last year' and is seeing growth again this year, though to a lesser extent." (Christa Fanelli, "Bain Capital Sends Company Upstream," *BuyOuts*, 10/8/01)

Solectron Itself Sold Stream To Portfolio Firm Of Private Equity Concern H.I.G. Capital In April 2004. "Originally a unit of Garland-based Software Spectrum, a software reseller, the business that is now called Stream was purchased for an undisclosed amount in June 2003 by a Miami private equity concern, HIG Capital. At the time, the business operated under the name ECE, an acronym for 'Exceptional Customer Experience.' In April, HIG purchased Stream International from California-based Solectron Corp., merged the 8,000-employee Stream with the 2,000 employee ECE and gave them the Stream name. Terms of that purchase weren't disclosed." (Jeff Bounds and Christine Perez, "Stream Picks Richardson For Consolidated Offices," *Dallas Business Journal*, 7/16/04)

- **Solectron's Divestment Was Complete By April 2004.** "Solectron Corporation, a leading provider of electronics manufacturing and integrated supply chain services, said today it completed the sale of its Stream International call center business to the parent company of ECE Holdings, Inc., a leading global provider of outsourced technical support and customer service and funded by H.I.G. Capital. Stream and ECE provide technical support and customer service to high-technology companies and their customers." (Solectron Corporation, Press Release, 4/14/04)

Stream International Filed IPO In 1997, Withdrew Offering Four Years Later

Stream Filed For IPO In April 1997 But Withdrew Filing On September 17, 2001. "In the wake of the Sept. 11 terrorist attacks, the psychological impact on how the attacks will affect the economy of the United States is still a large question mark. When the stock markets tumbled last week, many companies planning their initial public offerings decided to hold out until markets stabilized, while some pulled out altogether. ... Stream International Holdings Inc., a technical support outsourcing company, filed a \$51.6 million IPO in April 1997 with Deutsche Banc Alex. Brown serving as lead underwriter, but withdrew its offering Sept. 17. The company simply stated it

does not intend to conduct the offering of shares of common stock contemplated, according to its Form-RW.” (Frank Musero, “IPOs On Hold As Market Remains Uncertain,” *IPO Reporter*, 9/24/01)

In Letter To SEC Dated Sept. 14, 2001, Stream Offered No Explanation For Withdrawing Its IPO Registration. “In accordance with Rule 477 promulgated under the Securities Act of 1933, Stream International Inc. (the ‘Company’) hereby withdraws its Registration Statement on Form S-1 (Registration No. 333-26185), which was originally filed with the Securities and Exchange Commission on April 30, 1997. The Company is withdrawing the Registration Statement because it does not intend to conduct the offering of shares of Common Stock contemplated in the Registration Statement at this time. No shares of Common Stock of the Company have been issued or sold under the Registration Statement.” (Stream International Inc., Letter To The Securities And Exchange Commission, 9/14/01)

At Time Of Stream’s IPO Filing In 1997, Two Bain Capital Employees Sat On Company’s Board Of Directors

Bain Capital Principal Jonathan Lavine Served As Director Of Stream International. “Mr. [Jonathan] Lavine serves as a Director of the Company. He has been a Principal at Bain Capital, Inc. since 1995 and was an Associate at Bain Capital, Inc. from 1993 to 1995. ... Previously, Mr. Lavine worked in the mergers and acquisitions department of Drexel Burnham Lambert, Incorporated. Mr. Lavine is also a Director of Clarity Telecom, Inc. and American Pad & Paper Company.” (Stream International Inc., SEC Form S-1/A, Registration No. 333-26185, Filed 12/23/97)

Bain Capital Managing Director Mark Nunnelly Served As Director Of Stream International. “Mr. [Mark] Nunnelly serves as a Director of the Company. He has served as a Director of the Parent Company since 1995. Mr. Nunnelly has been a Managing Director of Bain Capital, Inc. since 1992, and a General Partner of Bain Venture Capital since 1990. Prior to joining Bain Venture Capital, Mr. Nunnelly was a Partner at Bain & Company, where he managed several relationships in the manufacturing sector...” (Stream International Inc., SEC Form S-1/A, Registration No. 333-26185, Filed 12/23/97)

Both Lavine And Nunnelly Were Members Of Stream’s Audit Committee And Compensation Committee. (Stream International Inc., SEC Form S-1/A, Registration No. 333-26185, Filed 12/23/97)

Bain Capital Financed Position In Stream International Thru Bain Capital Fund VI In 1999

Bain VI Closed In 1998 – While Romney Ran Daily Operations – With \$200 Million Committed By Firm’s Partners And \$1.1 Billion In Total Capital Commitments. “Bain Capital’s Fund VI closed in 1998 with \$1.1 billion in committed capital and the Coinvestment Fund of Fund VI raised \$400 million. Bain’s general partners committed \$200 million to the final closing.” (Christa Fanelli, “New Funds: Bain Capital Fund VII Aims For \$2B,” *BuyOuts*, 5/29/00)

Stream International Was Among Investments In Bain VI Portfolio. “Bain Capital will continue its tradition of investing in high-cap companies in various industries. The firm’s recent investments include Interpath, an e-commerce unit of Carolina Power & Light, Mattress Discounters, ChipPac Inc., a semiconductor assembly and test provider, and Stream International Inc., a technical support provider.” (Christa Fanelli, “New Funds: Bain Capital Fund VII Aims For \$2B,” *BuyOuts*, 5/29/00)

Bain Capital Took 30% “Carry,” Or Share Of Profits, From Bain VI. “With tight lips, Bain Capital this month began marketing its seventh buyout fund. Bain Capital Fund VII LP, like Fund VI, will be raised simultaneously with a Coinvestment Fund. ... Reports have indicated that Bain Capital will again charge a 30% carry for Fund VII, as it did for Fund VI.” (Christa Fanelli, “New Funds: Bain Capital Fund VII Aims For \$2B,” *BuyOuts*, 5/29/00)

Months After Bain’s Acquisition Of Stream, Bain Capital “Point Person” Scott Murray Was Hired As Stream’s President And Chief Operating Officer

February 2000: Three Months After Being Acquired By Bain Capital, Stream Appointed Longtime Bain Capital Business Associate Scott Murray As President And COO. “Stream International announced today the appointment of R. Scott Murray as President and Chief Operating Officer reporting to Steve Moore, Chairman and Chief Executive Officer. As President and Chief Operating Officer, Murray will be responsible for Stream’s North American operations, which account for the majority of Stream’s revenues and employees and will be part of the overall corporate executive team.” (Stream International, Press Release, 2/9/00)

The Deal Called Murray “A Point Person” For Bain Capital “As It Deals With Its Portfolio Companies.” “Knowing that private equity firms like to operate privately, Scott Murray, CEO of Modus Media International Inc., doesn’t want to say too much about Bain Capital LLC. But over the past several years he has emerged as a point person for the Boston-based private equity firm as it deals with its portfolio companies.” (Dennis Fitzgerald and Heidi Moore, “Movers & Shakers,” *The Deal*, 4/5/04)

Before Being Tapped To Run Stream, Murray Served As CFO At Bain Capital Portfolio Company “The Learning Company.” “Before joining Stream, Murray was the Executive Vice President and Chief Financial Officer of The Learning Company. TLC was the largest consumer software company in the world developing and marketing educational, productivity and entertainment software for the retail, OEM, direct response, International, school and e-commerce channels.” (Stream International, Press Release, 2/9/00)

Murray Held Senior Positions For At Least Three Bain Capital Portfolio Companies By The Age Of Forty – Including His Stint At Stream. “Before Murray, 40, joined Modus two years ago, he was president and COO of Stream International Holdings Inc., a call center company and Bain investment that in the mid-’90s included Modus. ... Prior to Stream, Murray was chief financial officer of Learning Co., an educational software company and an investment of Thomas H. Lee Co., Bain and Centre Partners Management LLC.” (Dennis Fitzgerald and Heidi Moore, “Movers & Shakers,” *The Deal*, 4/5/04)

Murray Said Bain Capital Had “Asked Me To Work With Them.” “Murray says his continued affiliation with Bain is largely serendipitous. ‘I have been available, and they have asked me to work with them,’ he says.” (Dennis Fitzgerald and Heidi Moore, “Movers & Shakers,” *The Deal*, 4/5/04)

As Of October 1, 1997 – Before Bain Capital Assumed Majority Stake – Stream Employed Over Seven Times As Many Full-Time Workers In The U.S. As It Did Overseas

Stream International Workforce (As Of Oct. 1, 1997) *	
Location	Full-time Employees
Beaverton OR (Gemini)	100
Beaverton OR (Murray)	560
Canton MA	650
Dallas TX (LBJ)	820
Dallas TX (Trinity)	960
Memphis TN	*
Domestic Employees	3,090
Amsterdam, Netherlands	220
Londonderry, Ireland	110
Velizy, France	90
Overseas Employees	420

* Source: Stream International Inc., SEC Form S-1/A, Registration No. 333-26185, Filed 12/23/97

Under Bain Capital’s Guidance – And As Result Of “Booming” Outsourcing Business – Stream Announced Ambitious Expansion Plans In Summer Of 2000

June 2000: Under Bain Management, Stream Announced Plans To Nearly Double Number Of Employees From 7,000 To 13,000, Including Over 200 New Jobs In Hometown Of Canton, Massachusetts. “Stream International Inc. of Canton will build up to a dozen new call centers worldwide as part of a \$60 million expansion it plans to announce today. Closely held Stream provides technical support for customers of companies including Microsoft Corp. and Excite@Home. It now has about 7,000 employees at 14 centers, including about 1,000 workers in Canton. An expansion over the next year will add another 6,000 employees, including about 255 in Canton, executives said.” (Ross Kerber, “Canton, Mass.-Based Tech Support Company To Announce Major Expansion,” *The Boston Globe*, 6/27/00)

- **Included In Stream’s Expansion Plans: 600 New Jobs In Mumbai, India.** “New sites will include buildings in Montana, New Mexico, Canada, and northern Spain, among other places. Stream also said it will hire 600 workers in Bombay, to provide support via e-mail. In Canton, Stream plans to upgrade its infrastructure and

add about 55 corporate staff employees, 100 software support workers, and 100 employees for hardware support.” (Ross Kerber, “Canton, Mass.-Based Tech Support Company To Announce Major Expansion,” *The Boston Globe*, 6/27/00)

Stream’s “Outsourcing” Business Was Described As “Booming.” “Stream’s call-center business is booming as hardware and software companies hire outsiders to answer questions about their products. The business is known as ‘outsourcing,’ and it spares companies from having to talk to live customers.” (Ross Kerber, “Canton, Mass.-Based Tech Support Company To Announce Major Expansion,” *The Boston Globe*, 6/27/00)

OUTSOURCING AMERICAN JOBS

Under Bain Management, Stream Declined To Open Call Centers In Idaho And Wyoming As It Opened Or Expanded Facilities In Canada, Spain, France, Ireland And India

In April 2000, Stream Declined Not To Open Call Facility In Gillette, Wyoming Because Local Unemployment Was Too Low And Workers Were Too Skilled. “The city will not be the location of a call center for Internet service providers because residents tend to be overqualified and want more pay than Stream International intended to provide. Susan Bigelow, executive director of the Campbell County Economic Development Corp., told the city council the news Wednesday. ... ‘Not many of the applicants at the open house indicated a willingness to work for less than \$10 per hour, which is consistent with the high skill level that was represented,’ she said.” (“Call Center No Longer Considering Gillette,” *The Associated Press*, 4/13/00)

- **“In April, Stream International Decided Against Opening A Computer Service Call Center In Gillette Because Workers Wanted Too Much Pay And The Local Economy Was Too Healthy.”** (“Two Telecommunications Companies Now Considering Gillette,” *The Associated Press*, 7/12/00)

Later That Summer, Stream Declined To Open Call Center In Twin Falls, Idaho. “Twin Falls had the telecommunications upgrades on the way. It pulled together a handsome package of incentives. And it had a site all picked out. But the city’s unemployment news was just too good to land a certain call center’s jobs for Twin Falls, which lost out to cities with higher jobless rates. Now that Dave McAlindin has a definitive ‘no’ from Stream International Inc., he consented recently to talk about the one that got away.” (Virginia Hutchins, “Low Unemployment Rates Doom Idaho Town’s Quest To Land Telecom Call Center,” *Times-News* [Twin Falls, ID], 9/19/00)

- **Stream’s Reasoning: Local Unemployment “Just Wasn’t High Enough.”** “[S]tream itself on Monday granted its first brief interview to The *Times-News*. ‘We were looking at the demographics of locating a contact center in your area,’ said Kathleen Nordgren, Stream’s director of public relations. ‘But I guess the good news for you is that one of the demographics that we look at is unemployment, and unemployment just wasn’t high enough to justify the size of contact center that we would be looking to open.’” (Virginia Hutchins, “Low Unemployment Rates Doom Idaho Town’s Quest To Land Telecom Call Center,” *Times-News* [Twin Falls, ID], 9/19/00)
- **Local Chamber Official Said Stream Officials Were “Pretty Aloof The Whole Time, Pretty Tough To Talk To.”** “Though Stream seemed satisfied with the location package, [Twin Falls chamber executive Kent] Just said he thinks an immediately ready building could have made a difference. But he never got to talk to Stream about it. ‘They were pretty aloof the whole time, pretty tough to talk to,’ Just said. ‘We talked to them through consultants, mostly.’” (Virginia Hutchins, “Low Unemployment Rates Doom Idaho Town’s Quest To Land Telecom Call Center,” *Times-News* [Twin Falls, ID], 9/19/00)

Later That Year, Stream Announced It Would Open New Facility In La Coruna, Spain. “To respond to the need for additional Spanish capabilities, Stream will open a customer interaction center in La Coruna, Spain, in the fourth quarter of this year. La Coruna was chosen due to the availability of customer service and technical skills in the labor force, the quality of the data and telecommunications infrastructure, and the proximity to local universities. Because La Coruna is near the Portuguese border, the site will also be able to enhance Stream’s Portuguese capabilities in Europe.” (Stream International, Press Release, 10/12/00)

- **“[I]n The Second Half Of 2000, Stream Will Have Opened A Total Of 6 New Customer Interaction Centers Worldwide, In The U.S., Canada, Spain, And India.”** (Stream International, Press Release, 10/12/00)

September 2000: Stream Launched New E-Service Facility In India, Offering “Cost-Efficient” Services To Worldwide Client Base. “Stream International ... today launched its expanded e-service offering through its new Virtual Interaction Center in India. The e-services will be offered by Stream Tracmail India Ltd, a joint venture formed to provide 24x7 electronic customer service and technical support solutions to Stream’s world-class client

base. ... The Virtual Interaction Center in Mumbai will provide high quality, cost-efficient eCRM services initially via e-mail, and in the future, chat, collaboration and knowledge authoring.” (Stream International, Press Release, 9/14/00)

- **President And COO Scott Murray:** “Our decision to expand our services to India provides clients with access to a unique labor market, which is not only highly skilled, but also has a strong work ethic. Customers will benefit from our guaranteed timely 24 hours response even though their questions are being answered from half way around the globe.” (Stream International, Press Release, 9/14/00)
- **India Facility “Will Be Managed By Stream’s North American Operations.”** “Stream Tracmail India Ltd. will be managed by Stream’s North American Operations. This structure will provide Stream’s clients with the same dependable high quality services that they experience from existing operations.” (Stream International, Press Release, 9/14/00)

March 2001: Stream Announced It Would Add Up To 300 Jobs – On Top Of 1,000 Existing Jobs – At Its Facility In Ontario, Canada. “Stream International, Inc. ... announced it will expand its operations in Belleville, Ontario, by adding capacity for up to 300 additional employees. Belleville currently hosts more than 950 employees who provide customer care and technical support using voice and Internet technologies. ... According to the company, Canada is a critical component of Stream’s North American expansion plans.” (“Canadian Expansion For Stream International,” *Customer Interaction Solutions*, 3/1/01)

In July 2001, Stream Selected Angers, France As Location For 200-Person Call Center. “Stream International, a global Customer Relationship Management (CRM) outsourcing and support services provider for leading technology companies and e-businesses, today announced that it has selected Angers, France, as the location of its newest European Customer Interaction Center. Stream’s second French Center will host 200 new workstations for customer care and technical support agents using leading edge voice and Internet-based technologies.” (Stream International, Press Release, 7/17/01)

- **An Existing Call Center Located Near Paris Already Employed 400 People.** “The move to Angers is a key component of Stream’s French expansion strategy. The first French center located in Velizy, near Paris, employs 400 support agents and is near capacity.” (Stream International, Press Release, 7/17/01)

August 2001: Stream Announced Opening Of New Facility In Nova Scotia, Expected To Create Up To 900 Canadian Jobs. “Stream International ... announced today that Stream has selected Glace Bay, Nova Scotia, for its next Canadian Customer Interaction Center. Once fully operational, Stream expects the Customer Interaction Center to employ up to 900 employees. Stream has begun recruiting for all levels of employment positions, including customer interaction agents, mentors, team managers and service delivery managers. The company expects to be able to fill its site management positions primarily from the local Cape Breton Region.” (Stream International, Press Release, 8/10/01)

September 2001: Stream Opened Call Center In British Columbia, Creating Roughly 900 New Canadian Jobs. “CRM outsourcing and support services provider Stream International opened its third Canadian customer interaction center in Chilliwack, British Columbia. At full capacity, the company expects to employ approximately 900 people. ... Stream expects to fill its site management positions primarily from the local Chilliwack area.” (“Stream Online In British Columbia,” *Customer Interaction Solutions*, 9/1/01)

October 2001: Stream Announced It Would Expand Its Derry Facility In Ireland, Which Already Employed More Than 600 People Providing Support For Dell And H-P Product Users. “Stream International has announced plans to expand its workforce in Londonderry. The company is currently recruiting technical support representatives and is also looking for team managers. ... The Derry operation started in January 1996 and now employs over 600 people making it the third largest employer in the city. Each day around 14,000 customer service and technical support issues are handled by telephone and e-mail for the end user customers of companies such as Dell or Hewlett Packard. Steve Moore, CEO Stream, views the Derry operation as one of the company’s key worldwide reference sites in terms of the quality of the local workforce and the world-class reputation the Derry site has developed with its clients.” (Joe Harkin, “Northwest Focus,” *Belfast Telegraph* [Ireland], 10/16/01)

October 2001: Stream Formed New Business Structure To Manage Canadian Operations In Wake Of New Facilities In British Columbia, Nova Scotia And Ontario. “Stream International, a global Customer Relationship Management (CRM) outsourcing and support services provider for leading technology companies and e-businesses, today announced a new organizational structure to lead its Canadian Management Team. ... This success has resulted in the opening of two additional Canadian sites in Chilliwack, British Columbia, and Cape Breton, Nova Scotia, in the past year.” (Stream International, Press Release, 10/10/2001)

- **President And COO Scott Murray Praised Company's Plans To Expand In Canada.** "We are very excited about the success we've had in Canada, which has prompted the formation of this new management structure for our Canadian Operations ... With over 1,000 employees currently working in Belleville and a combined 1,600 positions set to be filled in Chilliwack and Cape Breton, we felt it was necessary to put a dedicated team in place that would work to manage the day-to-day Canadian Operations." (Stream International, Press Release, 10/10/2001)

November 2001: Stream Announced It Would Expand Its Facility In Mumbai, India To Include Voice Support Services In Addition To Existing E-Mail Services. "Stream International ... today announced that the company will expand its capabilities to provide voice support at its Mumbai, India, site. ... Stream opened its Mumbai contact center in October 2000 to handle e-mail-based customer care. In only one year, the site reached a significant milestone by handling more than one million e-mail support requests. Based on this success and an increased demand for voice services from clients, Stream has expanded its telecommunications infrastructure in India and expects to handle voice-based support by December 2001." (Stream International, Press Release, 11/12/01)

- **Stream President And COO Scott Murray:** "We work closely with our clients to understand their needs, which is why we have developed a cost-effective way to deliver voice support via our Mumbai location ... The success of our off-shore customer care solution in India illustrates our ability to use a global infrastructure to develop cost-effective solutions that also meet our clients' needs for high-quality support." (Stream International, Press Release, 11/12/01)
- **Stream Provided Its Indian Workers With "Three Weeks Of Training On American English And Culture."** "Stream provides each agent with three weeks of training on American English and culture, in addition to client-specific training that they receive. Stream India is linked to Stream's North American IT infrastructure with both dedicated and virtual network connections for speed, quality, reliability and redundancy." (Stream International, Press Release, 11/12/01)

After Bain Capital Sold Stream International To Solectron In 2001, Company Proceeded To Shed Thousands Of American Jobs

Stream Once Employed More Than 3,000 People In Dallas, TX Area – By 2003 That Number Had Fallen To 350. "While under the Solectron umbrella, Stream had a huge Metroplex presence, at one time employing more than 3,000 in a 250,000-squarefoot building in Carrollton. That number had dropped to about 350 workers by October 2003, when the company shuttered its local operations and shipped the jobs offshore. During fiscal 2003, Stream generated an estimated \$400 million in revenue for Solectron." (Jeff Bounds and Christine Perez, "Stream Picks Richardson For Consolidated Offices," *Dallas Business Journal*, 7/16/04)

In July 2003, Stream Closed Call Center In Silver City, New Mexico And Laid Off Nearly 800 People. "A new call center here expects to have hired 100 people by February and will employ more than 500 once the center is in full operation. Teleperformance USA of Salt Lake City, one of the largest contact center outsourcers in the country, said its call center will provide customer services for telecommunications giant Sprint. ... Teleperformance will take over a building vacated when Stream International shut down its call center in July 2003 after less than three years in Silver City. That shutdown cost 770 jobs." ("Silver City Getting New Call Center," *The Associated Press*, 12/29/05)

- **Three Years Earlier – Under Bain Management – Stream Officials Trumpeted Possibility Of Providing Up To 1,100 New Jobs For Local Residents.** "The new call center here will triple the number of jobs it originally promised, said Michael Padilla, director of New Mexico operations for Stream International. The company said it would hire 300 when it applied for and received \$1.8 million of state in-plant training funds this summer. But Padilla told the *Journal* on Tuesday night that Stream expects to employ 620 by the end of October and could employ 900 to 1,100 by the end of December. 'This will be a huge diamond in the rough for Silver City,' he said." (Diane Velasco, "Stream Tripling Its Hiring," *Albuquerque Journal*, 9/29/00)

In August 2003, Stream Closed Call Center In Kalispell, Montana, Laying Off 330 People. "Montana's numbers for call centers appear decidedly in decline after suffering a huge blow when a Stream International Inc. call center in Kalispell closed last year, putting 330 people out of work." (Frank Jossi, "Dialing Up Call Centers," *Fedgazette*, 5/1/04)

- **Three Years Earlier – Under Bain Management – Stream Official Boasted That Company Would Create Between 500 And 650 Jobs At Kalispell Facility.** "Renovation work on Stream International's 60,000

square-foot call center is scheduled to be completed in late June, but already the company may have a space problem. Stream promised to provide 500 full-time jobs within three years, but it appears the firm will create substantially more jobs within months, officials said. 'Certainly there's a likelihood that we'll employ more than 500 people,' said Reed Garrett, a company vice president. Stream currently employs 225 people in Kalispell, and Garrett said hiring between 500 and 650 employees by the end of the year is reasonable." ("Stream May Hire Between 500 And 650," *The Associated Press*, 6/14/00)

- **Stream's Jobs Leaving Montana Were Likely To Head "To Foreign Lands."** "Wages might be low in Montana's Flathead Valley, but for the folks managing Stream International, they still aren't low enough. 'The entire industry is moving toward lower-cost locations,' said Bob Kula. 'It's the reality of the marketplace. We're definitely restructuring our business and adding capacity outside the United States and North America.' That is to say, when 330 Stream International jobs leave Kalispell next month, they'll likely head to foreign lands." (Michael Jamison, "Stream Jobs Flow Overseas," *Missoulian* [Missoula, MT], 7/11/03)
- **"The Shutdown Comes Just Three Years After City Leaders Granted Stream A \$4 Million Incentive Package To Entice The Company To Town."** (Michael Jamison, "Stream Jobs Flow Overseas," *Missoulian* [Missoula, MT], 7/11/03)

In October 2003, Stream Shuttered Its Facility In Suburban Dallas, Firing 354 People As Local Official Lamented Industry's Move "Offshore." "Massachusetts-based Stream International is apparently riding the wave of technology support companies relocating jobs overseas, as the giant customer service supplier exits the Metroplex, closing its Carrollton center and laying off 354 people. ... 'I've been aware they were downsizing,' [Carrollton, TX economic development official Brad] Mink said. 'That industry is moving offshore. It's very commonplace nowadays.'" (Margaret Allen, "Stream International Closes, Lays Off 354," *Dallas Business Journal*, 10/3/03)

- **Stream Had Been Major Employer In Metroplex Area For At Least Five Years.** "Mink said Stream had been in the 250,000-square foot building, formerly occupied by Texas Instruments, for five years or more. During that time, the company had consolidated and downsized its other Metroplex operations into the center." (Margaret Allen, "Stream International Closes, Lays Off 354," *Dallas Business Journal*, 10/3/03)

In 2004, Stream Shuffled Between 100 And 200 Jobs From Oregon Into Canada. "Stream International plans to move between 100 and 200 Beaverton call-center jobs out of the United States. ... Between now and July, Stream will move 100 to 200 jobs from Beaverton to Chilliwack, B.C., company officials said Tuesday. Stream, which employs about 800 people in Beaverton, will move technical support work that it handles for Hewlett-Packard." (Jeff Kosseff, "Beaverton Jobs Bound For B.C.," *The Oregonian*, 4/7/04)

Former Stream Employee Wade Padgett: "Their Tactics, In My Mind, Are Very Predatory, Taking Advantage Of Towns That Are Really Hurting." PADGETT: "They continue to look for somewhere cheaper. If the benefit of leaving outweighs the penalties, they cut and run for the next cheap labor pool. Their tactics, in my mind, are very predatory, taking advantage of towns that are really hurting. ... It's like a shell game. It lets them say they aren't moving jobs overseas, but all the new jobs are created overseas while the jobs here are eliminated." (Michael Jamison, "Stream Jobs Flow Overseas," *Missoulian* [Missoula, MT], 7/11/03)

MODUS MEDIA, INC.

Bain Capital Held Controlling Stake In Outsourced Manufacturing Services Provider Modus Media, Inc. (Formerly Known As Modus Media International, Inc.) From Early 1998 Through Mid-2004

In 1997, Outsourcing Services Company Stream International – Also A Bain Capital Investment – Announced It Would Split Into Three Separate Entities, One Of Which Was Modus Media. "But by April of 1997, Stream announced it was reorganizing into three independent businesses, citing 'marketplace assumptions that ... unfolded in ways different than originally envisioned.' While its Outsource Technical Support division would retain the Stream International name, its Outsource Manufacturing Services division would become Modus Media, a global manufacturing and fulfillment business. Its Corporate Technologies group would revert back to Corporate Software and Technology to concentrate on software resale and technology services." (Christa Degnan, "Net Technology Yields Midstream Split For Donnelley," *Mass High Tech*, 1/5/98)

Bain Capital Assumed Full Ownership Stake In Early 1998. "Modus spokeswoman Donna Tolley said the company is investing heavily in new facilities to fuel worldwide expansion, including operations in Ireland, Scotland and the Netherlands. ... She said in the next few weeks the company will be fully-owned by Bain

Capital, an original minority investor in Stream.” (Christa Degnan, “Net Technology Yields Midstream Split For Donnelley,” *Mass High Tech*, 1/5/98)

Bain Capital Had Taken Control Of Modus By February 1998. “Modus Media International, headquartered in Westwood, MA, recently completed its incorporation as an independent company. Following the ownership restructuring of Stream International Holdings Inc., a unit of R.R. Donnelley & Sons Company, Modus Media International Inc. is now a privately held corporation owned by private equity investment firm Bain Capital, Inc., Modus Media management and certain other stockholders.” (“Modus Media Now Independent,” *Tape-Disc Business*, 2/98)

In March 2004, CMGI Announced It Would Purchase Modus For \$230 Million In Cash/Stock. “Former high-tech highflier CMGI Inc., now based in Charlestown, leaped back into the limelight yesterday by acquiring Modus Media Inc., a Westwood supply-chain management company, for \$230 million in cash and stock. It’s a significant comeback for CMGI, a marketing company once based in Andover whose Internet venture capital business became one of the most spectacular stars of the 1990s Internet boom and a major victim of the ensuing bust.” (Hiawatha Bray, “CMGI Buy Marks A Comeback,” *The Boston Globe*, 3/25/04)

- **Bain Capital Was “Largest Shareholder” In Modus Media.** “CMGI Inc. scraped off the dust left from the dot-com bust yesterday, unveiling a \$230.5 million deal to buy rival Modus Media International Inc. that will essentially double CMGI’s revenue. ... The future of the top managers at Modus, whose largest shareholder is Boston private equity firm Bain Capital, also remains unclear.” (Jon Chesto, “CMGI Says Buy-Buy To Sidelines,” *Boston Herald*, 3/25/04)

CMGI’s Acquisition Of Modus Media Was Completed By August 2004. “CMGI, Inc. (CMGI) has completed the acquisition of Modus Media, Inc. Following the acquisition, CMGI will combine the supply chain management businesses of SalesLink Corporation, a wholly-owned subsidiary of CMGI, with that of Modus Media, and the combined business will operate as ModusLink Corporation.” (“CMGI: Completes Acquisition Of Modus Media Inc.,” *Knobias.com*, 8/2/04)

Modus Media Operated Outsourced Manufacturing Support Centers For Clients In The Technology Space

Modus Provided “Outsourcing Services” To Tech Companies. “Modus Media provides outsourcing services like customer order and fulfillment, packaging and hardware assembly to high-tech companies like Dell Computer Corp., Hewlett-Packard Co., IBM and Sun Microsystems Inc. It also offers e-commerce transaction processing services.” (Kelly Holman, “Modus Media Withdraws IPO,” *The Daily Deal*, 8/15/00)

Modus Had “Complex” Corporate History, Originally Part Of Larger Company Also Owned By Bain Capital Before Being Spun Off As Independent Firm In 1997. “Modus Media has a complex history. It was the documentation services division of R.R. Donnelley & Sons and in 1993 it was merged with Corporate Software Inc., a company that Bain Capital owned, to create Stream International Holdings Inc. In 1997, Stream was recapitalized instead as Modus Media International Holdings Inc. Bain earned a \$1.7 million advisory fee in connection with the recapitalization, and Modus Media paid Bain \$3 million in fees between 1998 and 1999. During that time, the company’s growth was minimal. Its Ebitda increased only 2.6% to \$36.8 million in 1999 from \$35.9 million in 1998.” (Kelly Holman, “Modus Media Withdraws IPO,” *The Daily Deal*, 8/15/00)

Bain Capital Worked Closely With Modus Media On Strategic Business Planning Throughout Period Of Its Ownership Stake

December 1997: Modus Chairman And CEO Terry Leahy Said He Would Be “Working Closely With Bain” On Strategic Expansion Plan. LEAHY: “Today marks an exciting beginning for Modus Media as a well-financed, independent corporation with a strong balance sheet and a leading market position ... Working closely with Bain, we move into 1998 with a clear strategic direction and capital investment plans that will continue to enhance the scope of our global supply chain management solutions for customers.” (Modus Media International, Press Release, 12/16/97)

August 2000: “Bain Capital Managing Directors Jonathan Lavine, Mark Nunnally And Robert White Sit On Modus Media’s Board Of Directors.” (Kelly Holman, “Modus Media Withdraws IPO,” *The Daily Deal*, 8/15/00)

In August 2002, Modus Hired Former Stream International President Scott Murray As CEO. “Modus Media International, Inc. (MMI) announced today the appointment of R. Scott Murray as Chief Executive Officer. ... Prior to joining MMI, Murray was President and COO of Stream International of Canton, Mass, a leading outsourcer of technical support, formerly affiliated with Modus Media. ... From 1994 to 1999, Murray served as Executive Vice

President and Chief Financial Officer of The Learning Company (TLC), a public company that, at the time, was one of the largest consumer software companies in the world.” (Modus Media International, Inc., Press Release, 8/19/02)

Murray Held Senior Positions For At Least Three Bain Capital Portfolio Companies By The Age Of Forty – Including His Stint At Stream. “Before Murray, 40, joined Modus two years ago, he was president and COO of Stream International Holdings Inc., a call center company and Bain investment that in the mid-’90s included Modus. ... Prior to Stream, Murray was chief financial officer of Learning Co., an educational software company and an investment of Thomas H. Lee Co., Bain and Centre Partners Management LLC.” (Dennis Fitzgerald and Heidi Moore, “Movers & Shakers,” *The Deal*, 4/5/04)

The Deal Called Murray “A Point Person” For Bain Capital “As It Deals With Its Portfolio Companies.” “Knowing that private equity firms like to operate privately, Scott Murray, CEO of Modus Media International Inc., doesn’t want to say too much about Bain Capital LLC. But over the past several years he has emerged as a point person for the Boston-based private equity firm as it deals with its portfolio companies.” (Dennis Fitzgerald and Heidi Moore, “Movers & Shakers,” *The Deal*, 4/5/04)

1997-1999: Bain Capital Received Payments Of At Least \$6.2 Million From Modus Media For Services Rendered

Management Agreements Resulted In Bain Capital Receiving Sum Payment Of \$1.7 Million In 1999 And Annual Payments Totaling \$4.5 Million From 1997-99 For “Certain Financial And Managerial Services.” “Management Agreement: In connection with the reorganization, Modus Media paid to Bain Capital, Inc., for prior services, the sum of \$1.7 million, of which \$710,000 was paid in cash and \$1.0 million was paid by issuance of 1,722,514 shares of our common stock. Also in 1997 we entered into a management agreement with an affiliate of Bain which required us to pay a fee of \$1.5 million in each of 1997, 1998 and 1999 in exchange for certain financial and managerial services. This agreement terminates upon the closing of this offering.” (Modus Media International Holdings, Inc., SEC Form S-1, Filed 12/10/99)

Bain Capital Held Roughly 39% Of Modus’ Common Stock At Time Of IPO Filing In Dec. 1999. “Bain Capital is an affiliate of the Bain Capital Funds, which hold approximately 39% of our common stock. Three of our directors, Jonathan Lavine, Mark Nunnally and Robert White, are Managing Directors of Bain Capital.” (Modus Media International Holdings, Inc., SEC Form S-1, Filed 12/10/99)

As Of Dec. 1999, Bain Was Invested In Modus Through Bain Capital Funds IV And V. Bain Capital Funds owned 5,024,402 shares of Modus Media’s common stock at the time of its 1999 IPO filing, including “956,826 shares held by Bain Capital Fund IV, L.P., 1,094,993 shares held by Bain Capital Fund IV-B, L.P., 143,514 shares held by BCIP Associates, 85,220 shares held by BCIP Trust Associates, 1,021,335 shares held by Information Partners Capital Fund, L.P., and 1,722,514 shares of non-voting common stock held by Bain Capital Fund V, L.P.” (Modus Media International Holdings, Inc., SEC Form S-1, Filed 12/10/99)

Bain Planned On Taking Modus Public, But Company Withdrew IPO Without Comment In August 2000

On August 14, 2000, Modus Media Withdrew Its Planned Initial Public Offering, Giving No Explanation. “On Monday, Modus Media, a portfolio company of Bain Capital, Inc., the Boston private equity firm, informed the Securities and Exchange Commission that it was withdrawing its eight-million-share initial public offering. The deal had been expected to price between \$11 and \$13 a share. The Westwood, Mass., company did not offer an explanation for the withdrawal, nor did it return calls for comment. Bain Capital, which has a 39% stake in the company, did not return calls, either.” (Kelly Holman, “Modus Media Withdraws IPO,” *The Daily Deal*, 8/15/00)

Months Earlier, Modus Had Decreased Price Of Its IPO From \$14-16 Per Share To \$11-13 Per Share. “With the sell-off on the Nasdaq continuing Tuesday, several IPOs that had been scheduled to price may now be delayed. ... Modus Media International, a global provider of supply-chain management services for the technology industry, postponed its initial public offering until further notice. Last month, the company decreased its price from \$14 to \$16 down to \$11 to \$13 per share.” (“MetLife, Krispy Kreme Price Shares To Tempt Non-Tech Investors,” CBSMarketWatch.com, 4/4/00)

Had IPO Gone Through, Bain Capital’s Stake In Modus Would Have Been Worth Up To \$130 Million. “Had the offering been brought, Modus Media stood to raise between \$88 million and \$104 million. Although Bain Capital did not plan to sell any shares in the offering, its stake would be worth even more – between \$110.5 million and \$130 million.” (Kelly Holman, “Modus Media Withdraws IPO,” *The Daily Deal*, 8/15/00)

EXPORTING AMERICAN JOBS

Modus Media's Total Workforce Declined By 27 Percent Between 2000 And 2004, When Bain Capital Owned Majority Stake In Company

In July 2000, Modus Reported Having 4,800 Employees. "Headquartered in Westwood, Massachusetts (USA), MMI is a privately held corporation with 4,800 employees and 25 Solution Centers in 13 countries." (Modus Media, Inc., Press Release, 7/5/00)

In March 2004, Modus Reported Employing 3,500 People – Roughly 1,300 Fewer Jobs Than Four Years Earlier. "Modus services include end-user order management, product packaging and assembly, process and systems integration services, fulfillment and reverse logistics. Modus is headquartered in Westwood, MA and employs 3,500 people across its operations in 13 countries." (CMGI, Inc., Press Release, 4/24/04)

Boston Herald: "About 3,500 Employees" At Time Of 2004 Sale To CMGI. "CMGI Inc. scraped off the dust left from the dot-com bust yesterday, unveiling a \$230.5 million deal to buy rival Modus Media International Inc. that will essentially double CMGI's revenue. ... Modus has about 3,500 employees, with 50 locally." (Jon Chesto, "CMGI Says Buy-Buy To Sidelines," *Boston Herald*, 3/25/04)

Modus Media Ran Majority Of Its Facilities In China, France, Singapore And Elsewhere Around The World

As Of December 1999, Modus Operated 20 "Solution Centers," At Least 13 Of Which Were Located Abroad. "We operate 20 solution centers worldwide with an aggregate square footage of approximately 2.0 million. All of our solution centers are leased, other than Singapore and Kildare, Ireland, which are owned." (Modus Media International Holdings, Inc., SEC Form S-1, Filed 12/10/99)

Modus Media Facilities (As Of Dec. 1999) *	
Overseas	North America
Dublin, Ireland	Fremont, CA
Kildare, Ireland	Raleigh, NC
Apeldoorn, Netherlands	London, UT
Cumbernauld, Scotland	Salt Lake City, UT
Singapore	Boise, ID
Angers, France	Preston, WA
Orleans, France	
Limerick, Ireland	
Willsborough, Ireland	
Sydney, Australia	
Shenzhen, China	
Ochiai, Japan	
Taipei, Taiwan	

* Source: Modus Media International Holdings, Inc., SEC Form S-1, Filed 12/10/99

In 1999, Modus Also Disclosed It Served As Minority Partner In Centers In Japan And Korea. "In addition, we are party to two minority owned joint ventures located in Ebina, Japan and KeyHeung, Korea. In addition, we maintain approximately 550 seats in our response centers within these solution centers for the resolution of questions regarding shipping, billing and technical support as well as a variety of other questions." (Modus Media International Holdings, Inc., SEC Form S-1, Filed 12/10/99)

Modus Media's Business Model Was Contingent Upon Expanding Operations Outside The United States – Under Bain Capital's Management, Overseas Revenues Grew To Account For Nearly 70% Of Company's Total

In 1997, Modus Made Investments To Expand Facilities In Ireland, Scotland And The Netherlands, Launch New Management Center In Ireland And Open Sales Office In Malaysia. "In the last six months of 1997,

Modus Media completed several major investments to expand and strengthen its global operations including: Facility expansions in Ireland, Scotland and The Netherlands; Technology enhancements to enhance on-demand manufacturing capabilities in Europe and the United States; Start-up of an in-house CD-ROM manufacturing facility in the United States; Launch of a multi-lingual response management center in Ireland; Opening of a sales office in Malaysia.” (Modus Media International, Press Release, 12/16/97)

From Fiscal 1997–1999, Sales Outside North America Accounted For Roughly 55% Of Modus Media’s Total Revenue. “We currently conduct business in Taiwan, Singapore, Ireland, the United Kingdom, the Netherlands and other foreign locations, in addition to our North American operations. Sales outside North America accounted for 54%, 55% and 54% of our total revenue for 1997, 1998 and 1999.” (Modus Media, Inc., SEC Form S-1/A, Filed 3/8/00)

- **In 2000 SEC Filing, Modus Said “Our Success Depends On Our Ability To Manage And Expand Our International Operations.”** “Our growth could be limited if we are unable to manage and expand our international operations. Our success depends on our ability to manage and expand our international operations. We currently expect international revenue to account for a significant percentage of our total revenue in the future. Failure to expand our international sales and fulfillment activities could limit our ability to grow.” (Modus Media, Inc., SEC Form S-1/A, Filed 3/8/00)

From Fiscal 2001–2003, Overseas Operations Respectively Accounted For 60%, 66% And 68% Of Modus Media’s Revenues. “With the completion of the Modus acquisition, we currently conduct business in Mexico, China, Taiwan, Singapore, Ireland, France, The Netherlands and certain other foreign locations, in addition to our United States operations. ... [S]ales outside the United States accounted for 68%, 66% and 60% of Modus’ total revenue for fiscal 2003, 2002, and 2001, respectively.” (CMGI, Inc., Form POS AM, Filed 8/2/04)

While Under Bain Capital’s Control, Modus Closed At Least Two U.S. Facilities, Laying Off More Than 250 Workers

In June 2000, Modus Closed Its Fremont, CA Facility – Cutting 200 Jobs – While Simultaneously Opening New Facility In Guadalajara, Mexico. “Modus Media Inc., which handles customer services and manages inventories for clients, including Microsoft Corp., said it plans to cut 200 jobs, or 4% of its work force, as it closes a plant in Fremont, Calif., to consolidate its North American operations. ... The closely held company said it’s also opening a plant in Guadalajara, Mexico.” (“Modus Media To Close Plant, Cut 200 Jobs,” *Bloomberg*, 6/2/00)

- **Modus Explained Decision To Put 200 California Workers Out Of A Job: “We Believe We Can Deliver More Cost-Effective Fulfillment Solutions For Our Clients” Elsewhere.** “As part of optimizing capacity in North America, the company will cease its Fremont, California fulfillment operations by September 1, 2000. The decision affects approximately 200 full-time and part-time employees. ... ‘It is always extremely difficult from an employee perspective to close a facility, but we believe we can deliver more cost-effective fulfillment solutions for our clients through one or a combination of our other Solution Centers,’ explains [Modus COO Pat] Donnellan.” (Modus Media, Inc., Press Release, 6/1/00)

In December 2002, Modus Announced It Would Close Its Facility In Preston, WA, Eliminating Roughly 70 Jobs. “Modus Media International, which builds and assembles technology products for companies such as Adobe, Dell Computer and Microsoft Corp., will close a 110,000-square-foot facility in Preston next year. About 70 employees at the east King County site will lose their jobs in February, according to company spokeswoman Donna Tolley. The work -- primarily software package assembly -- will be transferred to the company’s operations in Raleigh, N.C.; Austin, Texas; and Lindon, Utah.” (“Recent Layoffs At Area Technology Companies,” *Seattle Post-Intelligencer*, 12/11/02)

Modus Media’s Expansive Operations In China Were Called “Key Attraction” After Company Was Purchased By CMGI In 2004

Modus’ Chinese Presence Called “Key Attraction” In 2004 Buyout By CMGI. “[I]n late March, CMGI was a buyer rather than a seller, agreeing to acquire Modus Media International Inc., a supply-chain rival, for \$230.5 million in stock and cash. ... A key attraction of Westwood, Mass.-based Modus, which is slated to merge with SalesLink, is its presence in China.” (Dennis Fitzgerald, “Fire Sale,” *The Deal*, 4/5/04)

At Time Of Sale, Modus Had Five Active Facilities In China. “Privately held Modus, which had 2003 revenues of \$534 million, has 3,500 full-time workers in 25 facilities worldwide, including five in China.” (Hiawatha Bray, “CMGI Buy Marks A Comeback,” *The Boston Globe*, 3/25/04)

Modus Called “Especially Attractive” Buyout Candidate “Because Of Its Success In The Chinese Market.”

“Modus ... was especially attractive to CMGI because of its success in the Chinese market. Five of Modus’s facilities are in China, where most of the world’s laptop computers are made. Modus performs supply-chain work for a number of Chinese manufacturers, including Quanta, a major producer of laptops for American computer firms. ... ‘We are the largest player in China; nobody else is anywhere near the market share and footprint we have in China,’ said [Modus CEO Scott] Murray.” (Hiawatha Bray, “CMGI Buy Marks A Comeback,” *The Boston Globe*, 3/25/04)

While Under Bain Control, Modus Focused On Growing Operations In Asia – Launching Major 2001 Initiative To Expand Facilities In Singapore And China While Planning New Ventures In Malaysia

As Of August 1998, Modus Employed 400 Workers At Its Singapore Facility. “Global software leader Microsoft Corp has selected Singapore as its operations centre for the Asia-Pacific region ... For Modus Media International, whose plant is responsible for the finished packages and documentation for much of the Microsoft software sold in Singapore, the latest development comes as a welcome respite, given the economic slowdown. ‘It’s good news for us,’ its MD and vice-president for South Asia, S K Ramadas Naidu, told BT. The 400 employees of the company’s Singapore plant could now rest a little easier, he added.” (Kenneth James, “Microsoft Picks S’pore To Be Its Asia-Pacific Ops Centre,” *Business Times* [Singapore], 8/15/98)

In April 2000, Modus “Expanded Its Operations In Taiwan.” “Massachusetts-based info-tech company Modus Media Inc has expanded its operations in Taiwan by establishing a joint venture called MMI Taiwan CD Services. The venture, in which Modus has a majority stake, will function as a CD production facility and currently has two CD replication lines with an annual production capacity of 12m CD units. Later this year MMI Taiwan plans to increase the capacity to four lines providing full premastering, mastering, replication, printing and packaging capabilities.” (“Modus Media To Produce CDs In Taiwan,” *Telecom World Wire*, 4/25/00)

February 2001: Modus Launched \$100 Million Expansion Initiative In Asia, Creating Region Hub In Singapore Announcing It Would Employ Up To 350 New Workers. “US-based Modus Media Inc (MMI), that offers outsourced SCM solutions for the IT industry, last week launched its Asian eFulfillment Solution Centre in Singapore. This \$100 million initiative – located at the Chai Chee TechnoPark – will provide a central Asia-Pacific hub to service the region with integrated supply chain solutions and will officially open in April. ... The Westwood, Massachusetts-based MMI will make investments in infrastructure, technology, call centre deployment and people. ‘We expect to hire up to 350 new knowledge workers as a result of this initiative,’ [Modus spokesman Nick] Jackson said.” (Raju Chellam, “MMI Launches \$100m E-Fulfillment Centre Here,” *Business Times* [Singapore] 2/26/01)

- **“The Singapore Hub Will Be Supported By MMI’s Physical Fulfillment Centres In Penang, Shenzhen And Shanghai.”** (Raju Chellam, “MMI Launches \$100m E-Fulfillment Centre Here,” *Business Times* [Singapore] 2/26/01)

Plan Included \$5 Million Investment In Malaysian Operations. US-based supplier of outsourced supply chain management solutions, Modus Media Inc, plans to invest US\$5 million in Malaysia over the next five years. Its senior vice-president for Asia-Pacific Ramadas Naidu said the investment will be used to expand the company’s existing fulfilment centre in Penang and to set up a sales office in Kuala Lumpur by the end of this year.” (I-Mei Low, “Modus Media To Expand Operations,” *New Straits Times* [Malaysia], 2/19/01)

- **Modus Executive Ramadas Naidu:** “Malaysia is a high-growth zone for us and we are committed to investing a substantial amount there.” (I-Mei Low, “Modus Media To Expand Operations,” *New Straits Times* [Malaysia], 2/19/01)

Company Officials Said Regional Hub In Singapore Would Be Supported By “Additional Expansion” Of Facilities In China. “According to MMI Asia-Pacific’s marketing director Nick Jackson, the new eFulfillment Solution Centre will provide fully Web-enabled, end-to-end integrated supply chain management solutions. ... Jackson said the Singapore eFulfillment hub will be supported by MMI’s regional presence across Asean and greater China as well as additional expansion in MMI’s physical fulfilment centres in Penang, Shenzhen and Shanghai.” (I-Mei Low, “Modus Media To Expand Operations,” *New Straits Times* [Malaysia], 2/19/01)

As Of February 2001, Modus Reportedly Employed More Than 1,100 Workers In Asia. “MMI’s Asian resources include over 560,000 square feet of facilities and over 1,100 employees. According to Jackson, the company also invested US\$500 million in the Asia-Pacific on new facilities, automation and technology (designed to build on its supply chain management platform).” (I-Mei Low, “Modus Media To Expand Operations,” *New Straits Times* [Malaysia], 2/19/01)

Modus Also Had Significant Operations In Ireland, Employing Over 1,000 Local Workers There

July 1999: Modus Opened New Facility In Ireland, Expanding Number Of Employees In That Country To More Than 1,000. "Modus Media International, a global provider of supply chain management solutions to the high technology industry, recently expanded its Ireland Operations with the opening of a new Solution Center in National Technology Park in Limerick. ... The opening of the Limerick Solution Center creates 200 local jobs making Modus Media one of the Top 20 employers in Ireland. The company now employs more than 1,000 people across its facilities in Limerick; Willsborough; Clonsaugh; Kildare; and Eastpoint, Ireland." (Modus Media International, Inc., Press Release, 7/23/99)

DDi CORP.

Bain Capital Was "Biggest" Investor In Anaheim-Based Electronics Maker DDi, Which Saw Its Stock Price Soar – Then Crash – During Dot-Com Bubble

Venture Capitalists Made A Killing Off California-Based Electronics Maker DDi Corp. In 2000 And 2001 Before Its Stock Price Crashed. "The fall of Orange County electronics maker DDi Corp. hurt employees, investors and creditors but not the venture capitalists who helped bring the company public. At least \$2 billion in stock value and money owed to creditors has been wiped out as a slump in the electronics industry and price-slashing by competitors in Asia helped force DDi to seek bankruptcy protection last week. But the company's venture capitalists profited because they provided financial backing before the maker of printed circuit boards went public in April 2000, then sold their shares when the company's outlook was still positive." (Jim Finkle, "Dissecting DDi," *The Orange County Register*, 8/26/03)

Bain Capital Was "Biggest" Financial Backer Of DDi – Doubling Its Money By Cashing Out At Inflated Prices, Making Nearly \$50 Million Profit. "DDi is one of dozens of companies in which the early investors knew enough to bail out before the stocks crashed even as investment banks that they helped hire issued glowing forecasts about the prospects of those companies. In the case of DDi, the biggest venture capitalist was Bain Capital, a Boston firm that invested \$46 million in DDi before its IPO. Bain more than doubled its money on DDi, pulling out \$93 million by selling shares in two secondary stock offerings made before DDi's finances deteriorated." (Jim Finkle, "Dissecting DDi," *The Orange County Register*, 8/26/03)

- **Bain Was Largest Investor In DDi.** "Bain, which led an investment team of other venture capitalists, owned about 21 percent of DDi's total shares. Five of the eight DDi directors in 2000 and 2001 were current or past principals of Bain Capital, according to DDi documents filed with the SEC. DDi noted the Bain dominance in its prospectus for its public offering of stock." (Frank Phillips, "Romney Says Profit Unknown In DDi Sale," *The Boston Globe*, 8/21/03)

DDi's Story: 2,100 Jobs Lost, Billions In Shareholder Value Gone. "DDi ... has posted more than \$400 million in losses over the past two years. That dismal performance has cost: 2,100 jobs. DDi had 3,800 employees when its payroll peaked three years ago. That number is now just shy of 1,700, including 300 at its headquarters in Anaheim; \$1.8 billion in stock value. DDi's stock fell to a record low of one cent Thursday, down from a peak of almost \$46 in September 2000; \$194 million in debt to banks and bondholders. These creditors agreed to forget about all but \$91 million of the \$285 million that the company owed them during negotiations leading up to the bankruptcy filing." (Jim Finkle, "Dissecting DDi," *The Orange County Register*, 8/26/03)

Romney And His Bain Capital Partners Turned Huge Profit Before Exiting DDi Position As Price Crashed

Romney And His Firm Bailed Out Before Share Prices Plummeted. "Both Romney and Bain sold their stakes in DDi by 2001, and the stock collapsed in the two years since as the economy slumped. The sales netted Bain what appears to be a \$36 million profit, nearly doubling its investment in about three years." (Frank Phillips, "Romney Investment Surfaces In Probe," *The Boston Globe*, 8/19/03)

Romney Spokesman Claimed He Had "No Knowledge" Of Bain-DDi Dealings. "Romney spokeswoman Shawn Feddeman claimed the governor had 'no knowledge' of the deal, and noted Romney left Bain in 1999." (Elisabeth Beardsley, "Treasurer Asks For Review Of Pension Fund Losses," *Boston Herald*, 8/20/03)

- **Romney Signed SEC Documents For DDi Sale And Retained Interest In Three Bain Funds Involved In DDi Transaction.** "Romney had gone to Salt Lake City in early 1999 to run the Winter Olympics. But he signed the SEC's necessary documents for Bain when his company - and he as an individual shareholder - sold their stakes in DDi in the fall of 2000 and in the winter and spring of 2001. SEC records indicate that

Romney remained well into 2001 as a general partner in three of the four Bain funds that are involved in the DDi transactions.” (Frank Phillips, “Romney Investment Surfaces In Probe,” *The Boston Globe*, 8/19/03)

- **Romney Listed On SEC Records As Bain Capital “General Partner” In 2000-01 When DDi Sales Went Through.** “Records filed at the SEC show Romney signed insider trading forms on behalf of Bain’s venture capital funds, as general partner, when the funds sold the DDi holdings in 2000 and 2001. Romney’s financial disclosure forms for 2002 filed with the State Ethics Commission show that he held the position of ‘executive’ at Bain Capital Inc. and made a salary of more than \$100,000.” (Frank Phillips, “Bain Capital Deal Sparks Concerns,” *The Boston Globe*, 8/20/03)

Romney Claimed To Have No Idea How Much Profit He Made From Selling DDi Stock. “Governor Mitt Romney yesterday continued to distance himself from a controversial stock sale, saying he took no responsibility for any role that his former company, Bain Capital, had in touting the stock’s value and that he has no idea what profit he made when he sold it. ‘I left Bain long before the events,’ Romney said in his first, but brief, public comments about DDi Corp. ...” (Frank Phillips, “Romney Says Profit Unknown In DDi Sale,” *The Boston Globe*, 8/21/03)

- **Report: Romney Personally Sold More Than \$4 Million In DDi Stock In 2001.** “Romney, according to the Securities and Exchange Commission’s records, sold 182,436 shares of DDi stock in May 2001 for \$4.1 million. His profit is unclear.” (Frank Phillips, “Romney Investment Surfaces In Probe,” *The Boston Globe*, 8/19/03)
- **Romney Refused To Release Tax Forms Or Profit Records.** “Citing privacy reasons, Romney aides said the governor would not review his 2001 income tax to find out his profit on DDi. He also declined to release copies of his tax forms.” (Frank Phillips, “Romney Says Profit Unknown In DDi Sale,” *The Boston Globe*, 8/21/03)

Massachusetts Pension Fund Lost Over \$340,000 By Investing In DDi. “One investor that lost heavily on DDi was the Massachusetts state pension fund, which bought the stock long before Romney was elected governor. In its initial purchase within weeks of Lehman’s 1-Buy rating, the fund bought 11,300 shares at \$30.88 a share. The initial \$349,000 pension investment was sold off for \$3,409 in August 2002, at share prices between 18 cents and 36 cents.” (Frank Phillips, “Romney Investment Surfaces In Probe,” *The Boston Globe*, 8/19/03)

Various Brokerage Houses Settled SEC Investigation For \$1.4 Billion For Providing Misleading Analyst Coverage Of DDi. “DDi is one of the companies cited in a U.S. Securities and Exchange Commission investigation into allegations of conflict of interest at U.S. brokerages. Ten brokerages settled those charges in December without admitting or denying guilt and agreed to pay a total of \$1.4 billion.” (Jim Finkle, “Dissecting DDi,” *The Orange County Register*, 8/26/03)

SEC: Unnamed Analyst Claimed Bain Capital Was Pushing For Positive Coverage Of DDi Stock Despite Questionable Financial Prospects. “The SEC complaint cites an analyst, whom it doesn’t name, as saying in an e-mail written more than two months after the IPO that he was being pressured to issue a positive research report on DDi. ‘DDi and (Bain Capital) and bankers are obviously pushing for coverage and unhappy’ that no recommendation had yet been issued, the SEC cited him as saying in the June 28, 2001, e-mail. The analyst said in that e-mail that he thought the stock could fall to about \$20 but also said ‘bankers want a ‘buy’ and are pushing hard.’ Two days later, Lehman analyst Louis R. Misciocchia advised clients to ‘buy’ DDi, issuing a 12-month target price of \$36 per share. ... On Monday, they closed at about 4 cents.” (Jim Finkle, “Dissecting DDi,” *The Orange County Register*, 8/26/03)

ALLIANCE LAUNDRY SYSTEMS

Bain Capital Purchased Raytheon Unit – Renamed “Alliance Laundry Systems” – In May 1998

In May 1998, Bain Capital Led \$358 Million LBO Of Raytheon’s Commercial Laundry Unit, Renaming It Alliance Laundry Systems. “Alliance Laundry Systems LLC announced today that it has completed the acquisition of Raytheon Commercial Laundry, the commercial laundry equipment manufacturing business of Raytheon Company, for approximately \$358 million. Alliance Laundry Systems, headquartered in Ripon, Wisconsin, was founded by the senior management team of RCL and Bain Capital, Inc. of Boston, one of the nation’s leading private equity firms, for the purpose of this acquisition.” (Alliance Laundry Systems LLC, Press Release, 5/5/98)

At The Time, Company Officials Said They Did Not “Anticipate Any Changes In Employment Levels.” “Alliance Laundry Systems is the largest commercial laundry equipment manufacturer in North America, with plants in Ripon, Wisconsin; Marianna, Florida and Madisonville, Kentucky. ... ‘This acquisition represents the next

chapter in the success story of this business,' said Jeff Brothers, Senior Vice President Sales and Marketing. 'We have no plans to alter the strategies that have made the business successful.' The Company does not anticipate any changes in employment levels as a result of this transaction." (Alliance Laundry Systems LLC, Press Release, 5/5/98)

Under Bain Capital's Stewardship, Company Closed Plants And Laid Off Workers

In October 1999, Alliance Announced Closing Of Madisonville, KY Plant And Loss Of 300 Jobs. "The Alliance Laundry Systems Plant, which employs 250 to 300 workers on three shifts, will be closed by the middle of next year. Employees learned of the closing Monday, when a company spokesman read a one-page announcement. ... Mike Gold of Madisonville, a 15-year-employee, said the news hit very hard for him and his wife, who has been at the plant for 23 years. 'This was a big surprise to everybody,' he said. 'We thought the meeting might be about a new warehouse in the area.'" ("Laundry Plant Shutdown To Cost 250 To 300 Jobs," *The Associated Press*, 10/5/99)

- **Stunned Mayor: "I'm In A State Of Shock."** "If the workforce was blindsided by the announcement, local officials were also caught off guard when they heard the news. 'I'm in a state of shock,' said Madisonville Mayor Karen Cunningham, who said she had a meeting this week with the company for what she anticipated would be over efforts to obtain a new warehouse. The interim director the Madisonville-Hopkins County Economic Development Corp. was just as surprised. 'We didn't see it coming,' admitted Danny Koon." ("Laundry Plant Shutdown To Cost 250 To 300 Jobs," *The Associated Press*, 10/5/99)
- **Weeks Earlier, Alliance Had Announced Elimination Of 220 Jobs At Its Ripon, WI Facility – The Kentucky Plant Closure Brought 185 Of Those Jobs Back.** "Less than a month after it eliminated 220 employees, Alliance Laundry will bring 185 jobs back to its Ripon plant by closing a factory in Kentucky. The company will give first priority to recently terminated employees when hiring for the new positions in Ripon, said Alliance spokeswoman Patti Anderson-Shew. ... Alliance laid off 220 workers Sept. 17, one week after a contract expired to make home laundry units under the brand name Amana." ("After Layoff, Alliance Brings Jobs From Kentucky Plant," *The Associated Press*, 10/6/99)

In 2000, Alliance Undertook Corporate "Consolidation" That Eliminated 130 Jobs In Norwood, Ohio. "Barely three months after buying the Ajax pressing and finishing equipment business from American Laundry Machinery Inc., Alliance Laundry Systems will eliminate 130 jobs in Norwood and consolidate them into an existing plant in Florida. The company told employees about the move Tuesday. ... [I]t decided to merge the unit with a plant that makes washer extractors in Marianna, Fla., near Panama City, spokeswoman Patti Andresen-Shew said. While there will be 'some potential for transfers,' the jobs in Norwood will be eliminated, she said." (Cliff Peale, "Company Shrinks Work Force," *The Cincinnati Enquirer*, 6/8/00)

After Failed Attempt At IPO, Bain Capital Sold Alliance In 2004 For Substantial Profit

Starting In 2002, Bain Tried To Take Alliance Public – Either In Canada As An Income Trust Or In U.S. Via Income Deposit Securities. "Alliance, a portfolio company of Bain Capital and Bruckmann, Rosser, Sherrill & Co., had tried to go public via an IPO of income deposit securities, but the IPO never did materialize and Bain ultimately decided to pursue a sale instead. ... In 2002, Bain had initially looked to float Alliance as an income trust in Canada, the same market that served as the predecessor to the IDS in the U.S. However, tax issues quashed that idea. When the IDS market started making some noise in the U.S. earlier this year, the investors again looked to float the company. But like most IDS filings, the Alliance floatation never got off the ground..." (Kenneth MacFayden, "Teachers Scans IDS Graveyard For Deals," *BuyOuts*, 1/3/05)

In December 2004, Bain Capital Sold Alliance Laundry For \$450 Million. "Teachers' Private Capital, the private investment arm of Ontario Teachers' Pension Plan, has agreed to acquire Brentwood, Tenn.-based Doane Pet Care Co. for \$840 million in cash in a secondary buyout, it said Monday, Aug. 29. ... The deal marks the largest private equity transaction Teachers' Private Capital has carried out as a sole equity sponsor following its \$450 million purchase of Alliance Laundry Holdings LLC from Bain Capital LLC in December 2004." (Kelly Holman, "OT Buys Pet-Food Maker," *Daily Deal*, 8/30/05)

- **Bain Capital Reportedly Turned Profit Of 230% On Alliance Deal.** "Meanwhile, through the sale, both Bain and Bruckmann, Rosser, Sherrill & Co. will book a return of more than 230%, according to reports. In 1998, Bain led the acquisition of Alliance, acquiring the company in a \$375.6 million LBO from Raytheon Co., which held onto a minority stake in the business." (Kenneth MacFayden, "Teachers Scans IDS Graveyard For Deals," *BuyOuts*, 1/3/05)

Months After Bain Sold Its Interest, Alliance Laid Off 400 Workers In Florida And Added Roughly 250 Jobs In Wisconsin

Less Than A Year After Bain's Sale Of Alliance, The Company Laid Off 400 Workers In Florida By Closing Its Plant In Marianna. "When Alliance Laundry Systems announced plans to close its Marianna facility last week, it didn't take long for employees to begin the search for new employment. ... Alliance is moving its commercial laundry product line manufacturing and design operations from Marianna to its Ripon, Wisc., plant ... About 400 Marianna employees will lose their jobs as a result of Alliance's consolidation. ... Alliance expects to add 250 additional jobs to its Ripon plant. Kimbrough said the company is welcoming any Marianna employees who wish to relocate to Wisconsin." (Daniel Carson, "Alliance Laundry Phasing Out Operations At Marianna Plant," *The [Panama City, FL] News Herald*, 10/19/05)

- **Number Of Employees Laid Off In Florida Amounted To Nearly One-Third Of Total Number Of Alliance Employees.** "Alliance Laundry Holdings LLC, parent company of Alliance Laundry Systems LLC, announced today that it is consolidating its Marianna, Florida and Ripon, Wisconsin operations. ... Approximately 400 employees will be affected by the closure of the Marianna facility. ... Alliance expects that it will add approximately 200 manufacturing jobs to its Ripon operations and another 50 engineering, supervisory and technical service positions to its Ripon staff. Alliance Laundry Systems LLC currently employs 1300 employees worldwide." (Alliance Laundry Holdings LLC, Press Release, 10/14/05)

IMAGITAS INC.

Bain Capital Held Undisclosed Stake In Imagitas From 2000-05

In June 2000, Bain Capital Made \$5 Million Investment For Undisclosed Stake In Imagitas. "Boston-based private equity firm Bain Capital last month made a \$5 million investment for an undisclosed stake in Imagitas, an e-government company that specializes in forming online and offline partnerships with all levels of government agencies. Imagitas, based in Newton, Mass., has seen continual annual growth of over 50% throughout its seven years of existence." (Christa Fanelli, "Done Deals: Bain Capital Buys Piece Of Imagitas," *BuyOuts*, 7/3/00)

- **Carlyle Group Also Invested \$20 Million In Imagitas.** "Imagitas was founded in 1992 by Brett Matthews and his wife Ginger Salazar as a company that printed mover's guides for the postal service. ... The company raised more than \$39 million in four rounds of funding, including a \$20 million investment from Carlyle Venture Partners and Carlyle Partners II in 2000, the venture and buyout arms of Washington private equity firm Carlyle Group. ... Among the company's other investors are Bain Capital LLC and Liberty Mutual Group, both of Boston." (David Shabelman, "Imagitas Delivered To Pitney Bowes," *Daily Deal*, 5/13/05)

Imagitas "Provides Targeted Direct Mailing Services Through Partnerships With State And Federal Government Agencies." "Imagitas is a marketing company that provides targeted direct mailing services through partnerships with state and federal government agencies -- specifically, the US Postal Service and state Departments of Motor Vehicles. Imagitas services allow such clients as Home Depot, Ford, and AT&T to advertise to postal customers through the Mover's Guide and Welcome Kit." (Hoover's Company Records, 4/10/07)

- **"Imagitas Also Provides Vehicle Registration Renewal Guides For State DMVs."** (Hoover's Company Records, 4/10/07)

Under Bain's Leadership, Imagitas Envisioned Broadening Growth Into More Government Agencies And Making A More Effective Vehicle For Advertisers. "Imagitas' strategy for growing the business will focus on continuing to rollout the business into other federal and state government agencies, providing services similar to those provided to the Post Office, and to improve communications with citizens, and fund it by creating an effective marketing vehicle for advertisers, said [Bain's Andrew] Balson. ... Bain Capital has been looking to make an investment in the e-government space for some time." (Christa Fanelli, "Done Deals: Bain Capital Buys Piece Of Imagitas," *BuyOuts*, 7/3/00)

May 2005: Imagitas Announced It Was Being Acquired By Pitney Bowes For \$230 Million. "Looking to expand its direct mail services, Pitney Bowes Inc. said Thursday, May 12, it would acquire marketing services firm Imagitas Inc. for \$230 million. Pitney Bowes, which makes mail and document management systems, will pay roughly 2.6 times Imagitas' 2004 revenues of \$87 million. Pitney Bowes' director of investor relations, Charles McBride, said the Waltham, Mass.-based target is profitable and that its revenues have grown at a double-digit clip for at least the past three years." (David Shabelman, "Imagitas Delivered To Pitney Bowes," *Daily Deal*, 5/13/05)

Imagitas Is Being Sued In At Least Six States For Use Of Personal Information For Marketing Purposes

Imagitas Is Currently Target Of Class Action Suits In At Least Six States For Its Use Of Personal Information Provided By State Motor Vehicle Departments. “Motorists in several states, including Missouri, are suing a company that sends advertising in vehicle registration notices, saying it violates a federal law that protects their personal information. Massachusetts-based Imagitas Inc., under contract in Ohio and other states to mail vehicle registration notices, inserts an advertisement before sending the notices to millions of drivers.” (“Motorists Sue Over Junk Mail From BMV,” *The Associated Press*, 3/29/07)

- **Suits Have Been Filed In Ohio, Massachusetts And Florida, Among Other States.** “Lawsuits have been filed against Imagitas in Ohio, Massachusetts, Missouri, Florida, Minnesota and New York regarding the marketing that’s done with the vehicle registration notices. Imagitas has asked that the nine lawsuits be consolidated into one.” (“Motorists Sue Over Junk Mail From BMV,” *The Associated Press*, 3/29/07)
- **Ohio Lawsuit Was Filed In September 2006.** “Motorists in Cuyahoga, Medina, Geauga and Franklin counties sued Imagitas last September. The lawsuit contends that they never gave the BMV permission to release their personal information. ‘This creates a dangerous situation,’ said John R. Climaco, a Cleveland attorney for the motorists. ‘The state should be controlling the names of drivers.’” (“Motorists Sue Over Junk Mail From BMV,” *The Associated Press*, 3/29/07)
 - **“According To The [Ohio] Lawsuit Filed Aug. 1 [2006], Federal Law Forbids The Use Of Personal Information For Non-Governmental Purposes Without The Consent Of The Person Identified By The Information.”** (Ron Word, “Motorists Sue Over Ads Placed In Auto Registration Mailings,” *The Associated Press*, 8/18/06)
- **Florida Lawsuit Could Potentially Expand To Include More Than Two Million Floridians As Plaintiffs.** “Motorists are suing a subsidiary of Pitney Bowes for placing advertising inside automobile registration packets mailed to more than 2 million Florida car owners. Five motorists are listed as plaintiffs, but it could become more than two million or more if the class is certified as a class-action lawsuit.” (Ron Word, “Motorists Sue Over Ads Placed In Auto Registration Mailings,” *The Associated Press*, 8/18/06)
 - **“The Lawsuit Alleges That Imagitas Inc. Used Personal Information It Received From The Florida Division Of Highway Safety And Motor Vehicles ‘To Target And Distribute Advertising Materials.’”** (Ron Word, “Motorists Sue Over Ads Placed In Auto Registration Mailings,” *The Associated Press*, 8/18/06)

Imagitas Contracts With States To Print And Mail DMV-Related Notices – But Also Includes Targeted Advertising Materials From Third-Party Sponsors. “Imagitas has had the contract to send the notices since 2005. To do the mailings, the company receives drivers’ names and addresses. Imagitas pays the state to do the mailing, and receives a fee from the advertisers. Ohio drivers cannot decline to receive the information, said Alfie Charles, company vice president. The company does not sell or share the driver information it receives from the Ohio BMV, Charles said. ‘We go to great lengths to protect the information,’ Charles said.” (“Motorists Sue Over Junk Mail From BMV,” *The Associated Press*, 3/29/07)

“Included In The Information Provided To Imagitas Is The Name And Address Of The Motor Vehicle Owner And The Type Of Registered Vehicle.” (Ron Word, “Motorists Sue Over Ads Placed In Auto Registration Mailings,” *The Associated Press*, 8/18/06)

Citizens And Their Lawyers Contend Imagitas’ Use Of Names And Addresses For Commercial Purposes Violates Federal Law. “Jacksonville attorney Norwood ‘Woody’ Wilner told reporters Thursday that the use of motorists’ names and addresses for commercial purposes is a violation of the federal Driver’s Privacy and Protection Act. It was passed after the 1989 murder of TV actress Rebecca Schaeffer, whose stalker was able to track her down using motor vehicle records. ‘This is a question of personal privacy and security,’ Wilner said.” (Ron Word, “Motorists Sue Over Ads Placed In Auto Registration Mailings,” *The Associated Press*, 8/18/06)

Imagitas Denies Selling Or Redistributing Personal Data To Other Vendors And Claims It Protects Citizens’ Privacy. “Imagitas says it has improved service for residents while protecting privacy. ‘There is never any sale or redistribution of personal data under this program,’ said Imagitas spokesman Alfie Charles. Advertisers, he said, only receive ‘the opportunity to have their advertisement included in the envelope.’ In return, the ads provide the funding ‘to ensure that the state is able to eliminate its annual printing expenses for this mailing.’” (Paul Wenske, Op-Ed, “Combining State Business, Junk Mail Draws Lawsuit,” *Kansas City Star*, 4/2/07)

GS INDUSTRIES, INC.

In 1993 Bain Capital Purchased Kansas City Steel Company And Renamed It “GS Technologies”

Bain Capital Bought Kansas City-Based Steel Manufacturer Armco Worldwide In 1993, Renaming It GS Technologies. “Bain Capital provided the financing for a management-led buyout in 1993 of Armco Worldwide Grinding Systems of Kansas City, which was later renamed GS Technologies.” (Robert Cushman, “GS Industries President Leaves Shortly After Merger,” *Kansas City Star*, 12/18/95)

- **GS Technologies Had Ventures In Missouri, Minnesota, Canada And Across The World.** “GS Technologies runs a mini-mill in Kansas City, Mo.; a mill liner business in Minneapolis, consolidated companies in Chile, Peru and Italy and joint ventures in Canada, Mexico, Australia and the Philippines producing grinding products for the global mineral processing industry.” (“GS Industries Major Player After Producers Approve Merger,” *The [Charleston, SC] Post And Courier*, 10/6/95)

1995 Bain-Led Merger Created Even Larger Company, Now Called “GS Industries”

In 1995, Bain Capital Merged GS Technologies With Parent Company Of South Carolina’s Georgetown Steel, Creating \$1 Billion “GS Industries.” “The merger of two steel producers – including the parent of Georgetown Steel – has spawned GS Industries, with \$1 billion in annual sales and 3,800 employees worldwide. GS Technologies and Georgetown Industries completed the merger Thursday, creating the largest producer of steel wire rod in North America. ... GS Industries is a privately held firm controlled by Boston-based Bain Capital, which has owned the GS Technologies unit since November 1993.” (“GS Industries Major Player After Producers Approve Merger,” *The [Charleston, SC] Post And Courier*, 10/6/95)

- **Principal Shareholder In Georgetown Steel Before Bain Buyout Was State-Run Kuwait Investment Authority.** “Georgetown Industries’ operations include the Georgetown-based steel mini-mill, Georgetown Wire with operations in western Canada, and Florida Wire and Cable in Jacksonville, Fla. Kuwait Investment Authority will remain the principal shareholder in Georgetown Industries, Regelbrugge has said.” (“GS Industries Major Player After Producers Approve Merger,” *The [Charleston, SC] Post And Courier*, 10/6/95)

Bain Capital Owned An Estimated 60% Of GS Industries After 1995 Merger. “GS Industries is the product of a 1995 merger between Charlotte-based Georgetown Industries and GS Technologies in Kansas City, Mo. ... Its primary shareholder is Bain Capital, a Boston venture capital firm that holds 60% of the company.” (Arati Sontakay, “Steelmaker Plans Stock Sale,” *Charlotte Business Journal*, 11/3/97)

According To One Company Manager, Bain’s Goal Was Always To Take GS Industries Public. “GS Industries Inc. is a private company. In addition to Georgetown Steel, it has a steel mill in Kansas City, Mo., plus several others in foreign countries. Bain Capital, an investment group based in Boston, bought GS Industries in 1995. According to Georgetown Steel Vice President George White, Bain’s goal is to eventually take the company public.” (Rosanne Howard, “Mill Holds Its Own Despite Morale Problems,” *The Myrtle Beach Sun-News*, 9/29/00)

- **Bain Was Preparing To Take GS Public As Early As 1998.** “Charlotte-based GS Industries is interviewing investment bankers in preparation for an initial public offering that could raise as much as \$200 million. The specialty-steel maker says it may go public as early as next year.” (Arati Sontakay, “Steelmaker Plans Stock Sale,” *Charlotte Business Journal*, 11/3/97)

In 1997, GS Industries Endured Labor Disputes At Plants In Kansas City, Missouri And Georgetown, South Carolina

In December 1997, Workers At Georgetown Steel Plant In South Carolina Went On Month-Long Strike. “Workers remain off the job this week at a South Carolina steel plant owned by GS Industries Inc., which also owns a facility in Kansas City. Officials of United Steelworkers of America Local 7898 are contending that 595 hourly employees at Georgetown Steel Corp. are being locked out. Union members stopped working at the plant last Friday after the union rejected the company’s request that its final offer be put to the vote of the members. ... ‘It’s about fairness,’ [Local 7898 President James] Sanderson said. ‘They’re more interested in pleasing their investors than the people who made this plant profitable for them, the workers.’” (Randolph Heaster, “Steel Union Says South Carolina Plant Has Locked Out Hourly Employees,” *The Kansas City Star*, 12/11/97)

- **“Georgetown Steel, In Georgetown, S.C., Is Under The Same Ownership As GST Steel Co. Of Kansas City. GST Steel Endured A Three-Month Strike Earlier This Year.”** (Randolph Heaster, “Steel Union Says South Carolina Plant Has Locked Out Hourly Employees,” *The Kansas City Star*, 12/11/97)
- **Labor Leader: Bain “Forced A Labor Dispute At Every Location.”** “United Steelworkers of America, Local 7898 President James Sanderson ... said he believes Bain is anti-labor. At contract negotiation time, ‘they’ve forced a labor dispute at every location,’ he said.” (Rosanne Howard, “Mill Holds Its Own Despite Morale Problems,” *The Myrtle Beach Sun-News*, 9/29/00)

Earlier In 1997, Workers At GS’ Kansas City Plant Walked Off The Job For Three Months. “Workers at GST Steel Co. overwhelmingly passed a new contract with the company Thursday, ending a 10-week strike. ... GST Steel is owned by GS Industries Inc. of Charlotte, N.C. The parent company is controlled by Bain Capital, a Boston investment firm that financed a management-led buyout of the steel plant in 1993.” (Randolph Heaster, “10-Week Strike Ends At GST,” *The Kansas City Star*, 6/13/97)

- **Labor Stoppage At Kansas City Plant Was “[T]he Plant’s First Strike Since 1959...”** (Randolph Heaster, “10-Week Strike Ends At GST,” *The Kansas City Star*, 6/13/97)

“Last Year, GS Endured Strikes At Two Major Plants, Including One At Its Mill In The S.C. Coastal Town Of Georgetown.” (Stella Hopkins, “Playing To Strengths,” *Charlotte Observer*, 2/3/98)

In 2001, GS Industries Filed For Bankruptcy, Closed Its Kansas City Plant And Fired 750 Workers

February 2001: GS Industries Filed For Bankruptcy And Announced Closing Of Kansas City Plant, Eliminating 750 Jobs. “GST Steel Co., whose local ties date to the 19th century, will close as part of a bankruptcy reorganization, throwing 750 area employees out of work. ... In its Chapter 11 bankruptcy filing Wednesday, GST Steel parent GS Industries Inc. of Charlotte, N.C., cited record imports of low-priced steel, which have depressed prices, and high labor costs. ... In addition to GST Steel, whose formal name is GS Technologies Operating Co. Inc., four other GS Industries subsidiaries sought refuge Wednesday in bankruptcy court in Charlotte.” (Dan Margolies And Randolph Heaster, “Shutdown Is End Of An Era,” *The Kansas City Star*, 2/8/01)

“GS Industries Inc., A Steel-Rod Producer Owned By Boston Private Equity Firm Bain Capital, Will Close Its Money-Losing Plant In Kansas City, Mo.” (David Carey, “Bain Capital’s GS Industries Shutting Plant,” *Daily Deal*, 2/9/01)

- **“When The Plant Closed Earlier This Year ... Workers Lost Severance Packages And Health Insurance Coverage.”** (Thomas Farragher and Scott Bernard Nelson, “Business Record Helps, Hinders Romney,” *The Boston Globe*, 10/24/02)
- **“[A]ll Workers Employed 10 Years Or More At The Plant Would Receive Eight Weeks’ Severance Pay...”** (Dan Margolies and Randolph Heaster, “Shutdown Is End Of An Era,” *The Kansas City Star*, 2/8/01)

Plant Closure Came On Top Of Previous Layoffs In 2000. “Rumors had swirled at the GST plant in recent months about the possibility of a company bankruptcy as well as a plant shutdown. Both union and salaried employees were laid off late in 2000.” (Dan Margolies and Randolph Heaster, “Shutdown Is End Of An Era,” *The Kansas City Star*, 2/8/01)

- **Domino Effect: Months Later, Nearby Plant That Relied On GS Industries As Supplier Had To Shut Its Doors, Throwing More Than 100 People Out Of Work.** “The fallout from the shutdown of GST Steel Co. earlier this year continued last week, when Wire Rope Corp. of America Inc. announced plans to close its Kansas City plant. Wire Rope’s facility at 2100 Manchester Road has 107 hourly and salaried employees who will be laid off beginning Jan. 25, said Charles Salanski, president and chief operating officer. ... Wire Rope’s Kansas City plant also was singled out for closing because of the loss of its nearby supplier, GST Steel. Until it closed in June, GST supplied rods for the Wire Rope facility.” (Randolph Heaster, “Citing Slowdown, Wire Rope To Close KC Plant,” *The Kansas City Star*, 11/20/01)

Romney Was CEO Of Bain Capital And Held Financial Stake In Company At Time Of Kansas City Layoffs. “Although he gave up running day-to-day operations at the venture capital firm in order to head the Salt Lake Winter Olympics, he remained CEO and held his financial interest in the company through August 2001. That includes the period when the Ampad factory in Buffalo was closed, and when the Kansas City-based GST Steel plant was shut down and workers laid off.” (Stephanie Ebbert and Yvonne Abraham, “Camps Spar Over Romney Word Choice,” *The Boston Globe*, 10/31/02)

Bain Capital Called “Bully On The Block” As Workers Blamed Romney And His Firm For Plant Closing. “Out-of-work steelworkers in Kansas City, for example, blame Romney and Bain Capital for decisions that led to last year’s bankruptcy of a steel mill that opened its doors in 1888. Bain bought the operation, GST Steel Co., in 1993. Workers said the new owners cleaned house and brought in an inexperienced management team. Dan Misel, who worked at GST Steel for 35 years, said Bain came in ‘like the bully on the block,’ assuming its managers knew how to run the operation better than anyone already in place.” (Thomas Farragher and Scott Bernard Nelson, “Business Record Helps, Hinders Romney,” *The Boston Globe*, 10/24/02)

- **Romney Was Running Bain Capital When Kansas City Plant Endured 10-Week Strike In 1997 – Its First Labor Stoppage In Almost 40 Years.** “In 1997, two years before Romney left Bain to run the Winter Olympics, the Kansas City plant endured its first strike in four decades. After a 10-week walkout, union officials said they offered to work with managers to improve the plant’s competitiveness, but that the Bain-imposed managers weren’t interested.” (Thomas Farragher and Scott Bernard Nelson, “Business Record Helps, Hinders Romney,” *The Boston Globe*, 10/24/02)

Pension Benefit Guaranty Corporation Had To Assume Control Of Two Underfunded GS Pension Plans Affecting Over 1,000 Former Employees At Kansas City Facility. “The Pension Benefit Guaranty Corporation today announced that it has taken over two underfunded pension plans covering more than 1,000 people who worked at the Kansas City, Mo., facility of GS Technologies Operating Co. The company is a subsidiary of GS Industries Inc., a bankrupt producer of steel rod products. ‘PBGC has stepped in because the company is liquidating in bankruptcy and the pension plans do not have enough money to pay all benefits,’ said PBGC Executive Director Steven A. Kandarian.” (Pension Benefit Guaranty Corporation, Press Release, 8/5/02)

- **GS Had Roughly \$44 Million Worth Of Underfunded Pension Obligations.** “The GST Steel Company Pension Plan and the GS Technologies Pension Plan have a combined underfunding of about \$44 million, according to PBGC estimates. The agency will take over the plan’s assets and use PBGC insurance funds to pay the guaranteed pension benefits of covered workers.” (Pension Benefit Guaranty Corporation, Press Release, 8/5/02)

Former Employees Still Suffered, As Roughly 200 Workers Lost Their \$400/Month Pension Supplements. “Although the move will guarantee basic pension payments, former employees still stand to lose as bankrupt parent company GS Industries Inc. liquidates its assets. About 200 former GST workers who haven’t reached retirement age will lose a \$400 monthly pension supplement that the Pension Benefit Guaranty Corp. is not obligated to pay, said John Wiseman, a United Steelworkers of America representative in Independence.” (Stephen Roth, “Agency Takes Over Pensions Covering Ex-GST Workers,” *Kansas City Business Journal*, 8/16/02)

Workers’ Access To COBRA Health Coverage Expired Roughly Six Months After GS Industries Filed For Bankruptcy. “Wiseman said GSI also has informed former employees that their access to health care coverage through COBRA will expire Sept. 5. ... The loss of that coverage could be disastrous for former workers, some of whom, Wiseman said, have acquired asbestosis from years of working in the decades-old mill. ‘We have people looking at the prospect of \$2,000 to \$3,000 per month health care premiums, and they just can’t afford that,’ he said.” (Stephen Roth, “Agency Takes Over Pensions Covering Ex-GST Workers,” *Kansas City Business Journal*, 8/16/02)

- **No GS Industries Representatives Were Available To Comment:** “GSI Chief Executive Mark Essig was unavailable for comment. An employee said GS Industries, based in Charlotte, N.C., has sold all of its assets and no longer is in business.” (Stephen Roth, “Agency Takes Over Pensions Covering Ex-GST Workers,” *Kansas City Business Journal*, 8/16/02)

GS Industries Ceased To Exist In 2003 After Liquidating Its Assets And Closing Up Shop

June 2003: Company Had Five Remaining Employees To “Remove The Nameplates And Lock The Doors” After Company’s Assets Had Been Sold. “GS Industries filed for Chapter 11 on Feb. 7, 2001, in the U.S. Bankruptcy Court for the Western District of North Carolina in Charlotte. The company is down to five employees, and there’s little left to do but remove the nameplates and lock the doors because over its 28 months in bankruptcy, GS has sold off all assets.” (Greg Johnson, “GS Industries Can Liquidate,” *The Deal*, 6/16/03)

FLIP-FLOPS

Northeastern University's William Mayer: "After Studying Presidential Nominations For 30 Years, I've Never Seen Somebody Who Has So Completely Renounced His Past Record When He Decided To Run For President." (Jill Zuckman, "Romney's On A Roll, In The Money And The Polls," *Chicago Tribune*, 5/22/07)

TOP ROMNEY TURNAROUNDS

ABORTION: Romney Was Pro-Choice, Then Not Pro-Choice, Then Pro-Choice Again, Then Pro-Life

In 1994, Romney Backed Federal Funding Of Abortion And Codifying Roe v. Wade. "Romney supports a federal health care plan option that includes abortion services, would vote for a law codifying the 1972 Roe v. Wade decision that legalized abortion and backs federal funding for abortions as long as states can decide if they want the money, [a spokesman] said." (Ed Hayward, "Anti-Abortion Group Endorses Romney Bid," *Boston Herald*, 9/8/94)

1999: Romney Claimed "When I Am Asked If Am I Pro-Choice Or Pro-Life, I Say I Refuse To Accept Either Label." (Glen Warchol, "This Is The Place, But Politics May Lead Romneys Elsewhere," *The Salt Lake Tribune*, 2/14/99)

 **2002: Running For Massachusetts Governor, Romney Said He Was "Devoted" To Pro-Choice Position.** "I will preserve and protect a woman's right to choose, and am devoted and dedicated to honoring my word in that regard. I will not change any provisions of Massachusetts' pro-choice laws." (2002 Romney-O'Brien Gubernatorial Debate, Suffolk University, Boston, MA, 10/29/02)

2005: Romney Considered Abortion-Rights Supporter By Pro-Life Groups – Aide Claimed His Position Had Not Changed. "[Massachusetts Citizens for Life] considers Romney to be an abortion-rights supporter, as do national antiabortion groups such as the Family Research Council. ... [Romney aide Eric] Fehrstrom said the governor's position has not changed on either sex education or abortion." (Scott S. Greenberger, "Roe V. Wade Omitted From Proclamation," *The Boston Globe*, 3/25/05)

2007: Romney Now Claims He Has Always Been Pro-Life. "I am firmly pro-life ... I was always for life." (Jim Davenport, "Romney Affirms Abortion Opposition During Stop In SC," *The Associated Press*, 2/8/07)

IMMIGRATION: Romney Once Backed Path To Citizenship, Said McCain Plan Was "Quite Different" From Amnesty, But Now Says He Opposes Path To Citizenship And Attacks McCain Plan As "Amnesty"

In 2006, Romney Said Illegal Immigrants Should Have Path To Citizenship. "Gov. Mitt Romney expressed support ... for an immigration program that places large numbers of illegal residents on the path toward citizenship ... Romney said illegal immigrants should have a chance to obtain citizenship." (Evan Lehmann, "Romney Supports Immigration Program, But Not Granting 'Amnesty'," *The Lowell Sun*, 3/30/06)

- **Romney: "Those [Immigrants] That Are Here Paying Taxes And Not Taking Government Benefits Should Begin A Process Towards Application For Citizenship."** "I don't believe in rounding up 11 million people and forcing them at gunpoint from our country ... With these 11 million people, let's have them registered, know who they are. Those who've been arrested or convicted of crimes shouldn't be here; those that are here paying taxes and not taking government benefits should begin a process towards application for citizenship, as they would from their home country." (Evan Lehmann, "Romney Supports Immigration Program, But Not Granting 'Amnesty'," *The Lowell Sun*, 3/30/06)

In 2005, Romney Said McCain Immigration Plan Was "Quite Different" From Amnesty And Called Plan "Reasonable." "In a November 2005 interview with the *Globe*, Romney described immigration proposals by McCain and others as 'quite different' from amnesty, because they required illegal immigrants to register with the government, work for years, pay taxes, not take public benefits, and pay a fine before applying for citizenship. 'That's very different than amnesty, where you literally say, "OK, everybody here gets to stay,"' Romney said in the interview. 'It's saying you could work your way into becoming a legal resident of the country by working here without taking benefits and then applying and then paying a fine.'" (Scott Helman, "Romney's Words Grow Hard On Immigration," *The Boston Globe*, 3/16/07)

- **Romney Spoke "Approvingly Of Efforts By McCain And Bush To Solve The Nation's Immigration Crisis."** "Romney did not specifically endorse McCain's bill, saying he had not yet formulated a full position

on immigration. But he did speak approvingly of efforts by McCain and Bush to solve the nation's immigration crisis, calling them 'reasonable proposals.'" (Scott Helman, "Romney's Words Grow Hard On Immigration," *The Boston Globe*, 3/16/07)

 **Today Romney Says He Opposes Any "Special Pathway To Citizenship."** "[I] think I'm best off to describe my own positions. And my positions, I think I've just described for you – secure the border, employment verification and no special pathway to citizenship. I feel that's the course we ought to take." (CNN's "The Situation Room," 5/22/07)

Today Romney Refers To McCain-Backed Immigration Reform Bill As "Amnesty." "The crowd at South Carolina's Republican convention ... cheered as presidential candidate Romney told them: 'One simple rule: No amnesty.' During his speech and before his remarks, Romney said a proposed new visa for immigrants amounts to amnesty if it can be renewed indefinitely. 'If that's not a form of amnesty, I don't know what is,' Romney said. 'I think we should not call it the "Z visa," we should call it the "A visa" because it's amnesty and that's what it stands for.'" (Jim Davenport, "S.C. Republicans Cheer Romney As He Attacks Immigration Bill," *The Associated Press*, 5/19/07)

TAX CUTS: Romney Refused To Endorse 2003 Bush Tax Cuts, Now Makes Them Central Part Of His Campaign

Boston Herald: Romney "Refused To Take A Position On Bush's Massive, 10-Year Tax Cut Plan." "[R]omney spoke at the 10th annual legislative conference organized by U.S. Rep. Martin T. Meehan (D-Lowell) and met with the Massachusetts delegation. ... Congressional sources said that a point of contention arose when Romney refused to take a position on Bush's massive, 10-year tax cut plan." (Noelle Straub, "Romney Talks Policy With Bush Staffers, Mass. Delegation," *Boston Herald*, 4/11/03)

Romney Said He Wouldn't Be "Cheerleader" For Tax Relief Plan He Didn't Agree With. "According to the observer, who spoke on condition of anonymity, Romney told the delegation that he 'won't be a cheerleader' for proposals he doesn't agree with, 'but I have to keep a solid relationship with the White House.'" (Wayne Washington and Glen Johnson, "Romney Weighs In – Carefully – On Bush Tax-Cut Plan," *The Boston Globe*, 4/11/03)

Romney Spokesman Claimed Tax Cuts Weren't A State Matter. "Shawn Feddeman, Romney's spokeswoman, said the governor has neither endorsed nor opposed the tax cut plan because 'it's just not a state matter.'" (Wayne Washington and Glen Johnson, "Romney Weighs In – Carefully – On Bush Tax-Cut Plan," *The Boston Globe*, 4/11/03)

Romney Now Says He Supported The President's Tax Cuts. "McCain opposed President Bush's tax cuts, Romney noted. 'I supported them,' the former governor said." (Lee Bandy, "Romney Targeting McCain," *The State* [SC], 2/4/07)

NO NEW TAXES PLEDGE: Romney Refused To Sign ATR Pledge Against Raising Taxes In 2002, Eagerly Signed It In 2007

In 2002, Candidate Romney Refused To Sign ATR Pledge Against Tax Increases. "Four years ago, Mitt Romney broke with GOP tradition and refused to sign the [Americans for Tax Reform] pledge [to 'oppose and veto any and all efforts to increase taxes']." (Lisa Wangsness, "Healey Will Sign Antitax Pledge," *The Boston Globe*, 9/4/06)

Romney "Rebuffed" Calls To Sign Pledge, Drawing Wrath Of Anti-Tax Advocates. "Gubernatorial front-runner Mitt Romney drew the wrath of GOP anti-tax stalwarts ... by refusing a 'no new tax' pledge to back his levy-cutting promises. Breaking with the past three Republican governors, Romney rebuffed perennial calls by Citizens for Limited Taxation to sign the vaunted pledge." (David R. Guarino, "Romney Refuses To Sign CLT's 'No New Tax' Pledge," *Boston Herald*, 3/28/02)

- **"Romney's Gubernatorial Campaign Spokesman, Eric Fehrstrom, Dismissed Such Pledges At The Time As 'Government By Gimmickry.'"** (Scott Helman, "Romney Finds 'No New Taxes' Promise Suits Him After All," *The Boston Globe*, 1/5/07)

In 2007, Romney Signed Pledge As His Presidential Campaign Began. "Almost five years after he refused to sign a 'no new taxes' pledge during his campaign for governor, Mitt Romney announced ... that he had done just that, as his campaign for the 2008 Republican presidential nomination began in earnest." (Scott Helman, "Romney Finds 'No New Taxes' Promise Suits Him After All," *The Boston Globe*, 1/5/07)

- **Media Noted Signing Of Pledge Symbolized His Shift In Focus To GOP Primary Voters.** “Romney’s announcement about signing the pledge came on his first day out of office, and it symbolized what’s now his biggest priority: building support from GOP activists and voters, especially in states with early primaries.” (Scott Helman, “Romney Finds ‘No New Taxes’ Promise Suits Him After All,” *The Boston Globe*, 1/5/07)
- **Concord [NH] Monitor Called It “The Latest Shift For Romney.”** “In the latest shift for Romney ... he recently signed a ‘taxpayer protection pledge’ sponsored by the Grover Norquist-led Americans for Tax Reform. In 2002 ... Romney declined to sign a written pledge not to raise taxes.” (Sarah Liebowitz and Eric Moskowitz, “Romney Pledges To Run A Different Campaign,” *Concord Monitor*, 1/9/07)

CAMPAIGN FINANCE REFORM: Romney Now Criticizes McCain-Feingold But Once Called For Abolishing PACs, Implementing Spending Limits And Taxing Political Donations

The Hill: “[R]omney ... Once Touted Dramatic Restructuring Measures Such As Taxing Political Contributions And Placing Spending Limits On Federal Campaigns.” “Former Massachusetts Gov. Mitt Romney, who strongly criticized campaign-finance regulations in a private meeting with House conservatives last week, once touted dramatic restructuring measures such as taxing political contributions and placing spending limits on federal campaigns.” (Alexander Bolton, “Romney’s About-Face On Campaign Funding,” *The Hill*, 2/8/07)

- **Romney Proposed Installing 10 Percent Tax On Private Donations To Political Campaigns.** “Mr. Romney campaigned in favor of clean elections, which provides public money to candidates for state office who meet strict fund-raising requirements. But he suggested an alternative funding method. Instead of providing campaign funds from state coffers, his plan would tap 10 percent of the fund raising of candidates who choose to raise money privately.” (Richard Nangle, “Clean Election Advocates Keep Pushing,” *Telegram & Gazette* [Worcester, MA], 11/14/02)
- **Romney Proposed Spending Cap On Congressional Elections.** “Romney also said he advocates spending limits on congressional elections, even suggesting that the current race against Sen. Edward M. Kennedy should have a \$6 million spending cap.” (Frank Phillips, “Romney, Vowing To Live It, Touts Congress Reform Plan,” *The Boston Globe*, 7/27/94)
-  **Romney: “I Also Would Abolish PACs ... I Don’t Like Them.”** “I also would abolish PACs. You probably have one – I don’t like them. I don’t like the influence of money – whether it’s business, labor or any other group. I do not like that kind of influence. Lobbyists, I want to register, know who they are. I want to make sure gifts are limited. I think we have to really become much more vigilant in seeing the impact on money – and I don’t care how it’s organized – on money on politics.” (Mitt Romney, Remarks To Burlington Business Roundtable, Burlington, MA, 10/11/94)

Romney Now Attacks Campaign Finance Reform, Calling McCain-Feingold “A Terrible Piece Of Legislation.” “Romney noted his foe from Arizona wrote the McCain-Feingold campaign finance reform law that restricts certain types of contributions. ‘That’s a terrible piece of legislation,’ Romney said. ‘It hasn’t taken the money out of politics. ... (But) it has hurt my party.’” (Lee Bandy, “Romney Targeting McCain,” *The State*, 2/4/07)

REPUBLICAN AFFILIATION: Romney Was Not Republican Until 1993, Has Donated To Democrats, Voted For Paul Tsongas, Refused To Even Read Contract With America

Romney Voted For Paul Tsongas In ‘92 Presidential Primary. “An Independent until last December, [Romney] publicizes his brief stint as a Democrat to support ex-senator Paul Tsongas in the 1992 presidential primary. ‘I’m not a partisan politician,’ he said.” (David Broder, “Kennedy Tries To Polish Faded Image,” *The Washington Post*, 10/7/94)

Romney Has Made Campaign Contributions To Democrats. “Belmont businessman W. Mitt Romney ... defended donations to Democratic congressional candidates in 1992. ‘I don’t think they’re mortal sins for Republicans to make contributions to good people and to their friends, irrespective of their party,’ Romney, 46, told reporters...” (Wayne Woodlief, ‘Romney: Religion No Issue In Senate Race,’ *Boston Herald*, 2/3/94)

 **Romney “Warmly Praised” Bill Clinton During ‘94 Senate Race.** “[Romney] warmly praised President Clinton. ‘I think the president does a lot of things that make a lot of sense,’ he said. ‘I support him in many ways.’” (Scot Lehigh and Frank Phillips, “Round 2 – Sound Without The Fury,” *The Boston Globe*, 10/28/94)

Romney Campaigned Against The Contract With America And The ‘94 Republican Agenda. “Mr. Romney, a venture capitalist who has never held elective office, criticized the Republican campaign agenda, the ‘Contract

With America,' as too partisan. He said he would have gone against the GOP leadership and supported the crime bill, and would oppose a capital gains tax cut." (Rod Dreher, "Kennedy Avoids Haymaker In Final Debate With Romney," *The Washington Times*, 10/28/94)

REAGAN LEGACY: Romney Distanced Himself From President Reagan In 1994, Saying He Was An Independent During Reagan Years, But Now Claims Reagan As His Hero

Romney Panned Contract With America, Refused To Link Himself To Reagan Administration. "In his 1994 debate with Kennedy, Romney ... balked when Kennedy tried to link him to the Reagan administration." (Dan Balz and Shailagh Murray, "Mass. Governor's Rightward Shift Raises Questions," *The Washington Post*, 12/21/06)

-  **Romney:** "I was an independent during the time of Reagan-Bush. I'm not trying to return to Reagan-Bush." (Joe Battenfeld, "Conservative Group Yanks Its Support For Mitt," *Boston Herald*, 10/27/94)

Romney Now Claims Reagan As His Political Hero. "Ronald Reagan is one of my heroes,' Romney said as he praised Reagan's strategy for winning the Cold War: 'We win; they lose.'" (Michael Levenson, "Romney Links Gay Marriage, US Prestige," *The Boston Globe*, 2/26/05)

SECOND AMENDMENT: Romney Once Bragged Of Opposing NRA, Promised Not To "Chip Away" At Tough Gun Laws But Now Seeks NRA Endorsement

Romney Supported Brady Bill And Assault Weapons Ban, Bragging His Stance Was "Not Going To Make Me The Hero Of The NRA." "[Romney] said he will take stands that put him at odds with some traditional ultra-conservative groups, and cited his support for the assault rifle ban and the Brady gun control law. 'That's not going to make me the hero of the NRA,' he said. 'I don't line up with a lot of special interest groups.'" (Andrew Miga, "Mitt Rejects Right-Wing Aid," *Boston Herald*, 9/23/94)

 **Romney Praised Massachusetts' Tough Gun Laws, Vowed Not To "Chip Away At Them" As Governor.** "[A]s the GOP gubernatorial candidate in 2002, Romney lauded the state's strong laws during a debate against Democrat Shannon O'Brien. 'We do have tough gun laws in Massachusetts; I support them,' he said. 'I won't chip away at them; I believe they protect us and provide for our safety.'" (Scott Helman, "Romney Retreats On Gun Control," *The Boston Globe*, 1/14/07)

Romney Explains He Signed Up For Lifetime NRA Membership In August 2006 Because "I'm After The NRA's Endorsement. ... If I'm Going To Ask For Their Endorsement, They're Going To Ask For Mine." "Expressing familiarity with and support for gun rights is key among Republican presidential contenders ... It helps explain why Romney joined the NRA last August, signing up not just as a supporter but a designated 'Lifetime' member ... Romney told a Derry, N.H., audience, 'I'm after the NRA's endorsement. I'm not sure they'll give it to me. I hope they will. I also joined because if I'm going to ask for their endorsement, they're going to ask for mine.'" (Glen Johnson, "Romney Calls Himself A Longtime Hunter," *The Associated Press*, 4/5/07)

OWNING A GUN: Romney Said He Owned A Gun Himself, Then Admitted It Was Not His Gun

Romney Appealed To Gun Owners For Support, Claiming To Be One Of Them. "[Romney said] he hopes states would continue to ease regulations on gun owners, and he expressed enthusiasm for guns and hunting. 'I have a gun of my own. I go hunting myself. I'm a member of the NRA and believe firmly in the right to bear arms,' Romney said." (Scott Helman, "Romney Retreats On Gun Control," *The Boston Globe*, 1/14/07)

Romney, In Early 2006: "I Have A Gun Of My Own, I Go Hunting Myself..." (Glenn And Helen Show, www.glennandhelenshow.com, 1/10/07)

Days Later, Romney Admitted That He Did Not Own A Gun. "On Wednesday, Romney said on an Internet podcast, 'The Glenn and Helen Show,' that he hopes states would continue to ease regulations on gun owners, and he expressed enthusiasm for guns and hunting. 'I have a gun of my own. I go hunting myself. I'm a member of the NRA and believe firmly in the right to bear arms,' Romney said. Asked by reporters at the gun show Friday whether he personally owned the gun, Romney said he did not. He said one of his sons, Josh, keeps two guns at the family vacation home in Utah, and he uses them 'from time to time.'" (Scott Helman, "Romney Retreats On Gun Control," *The Boston Globe*, 1/14/07)

HUNTING: Romney Claimed To Be Lifelong Hunter While Having Been Hunting Twice In His Life, Later Explaining He Was Frequent Hunter Of "Small Varmints" And Rodents

Romney Has Spoken Of His Hunting Prowess “On Several Occasions.” “The Republican presidential contender has told audiences on several occasions, most recently this week in gun-savvy – and early voting – New Hampshire, that he has been a longtime hunter.” (Glen Johnson, “Romney Calls Himself A Longtime Hunter,” *The Associated Press*, 4/5/07)

Romney Later Admitted He Has Been Hunting Only Twice In His Life – Once Nearly Fifty Years Ago, Once At “Fenced Game Preserve” On 2006 Retreat For Political Donors. “[T]he former Massachusetts governor’s hunting experience is limited to two trips at the bookends of his 60 years: as a 15-year-old, when he hunted rabbits with his cousins on a ranch in Idaho, and last year, when he shot quail on a fenced game preserve in Georgia. Last year’s trip was an outing with major donors to the Republican Governors Association, which Romney headed at the time.” (Glen Johnson, “Romney Calls Himself A Longtime Hunter,” *The Associated Press*, 4/5/07)

- **Washington Post Editorial: “Mitt Romney Tried To Look Like A Hunter – And Ended Up Shooting Himself In The Foot.”** (Editorial, “Killer Rabbits,” *The Washington Post*, 4/10/07)

 **Romney Revised His Remarks The Next Day, Saying He Has “Always” Hunted “Rodents” And “Small Varmints.”** “Republican presidential candidate Mitt Romney is taking a second shot at describing his hunting experience. ... Campaigning in Indianapolis on Thursday, Romney said he has hunted small game since his youth. ‘I’m not a big-game hunter. I’ve made that very clear,’ he said. ‘I’ve always been a rodent and rabbit hunter. Small varmints, if you will. I began when I was 15 or so and I have hunted those kinds of varmints since then. More than two times.’” (Emily Udell, “Romney Aims Again To Explain Hunting,” *The Associated Press*, 4/6/07)

UNIVERSAL HEALTH CARE: After Striving To Take Credit For Universal Health Insurance Bill In Massachusetts, Romney Is Now Running Away From His Own Plan

Romney Staged Elaborate Signing Ceremony With Banners And A Fife-And-Drum Corps. “In a Colonial-era hall, with a fife-and-drum corps marching in with him, Gov. Mitt Romney (R) signed a bill Wednesday requiring all Massachusetts residents to purchase health insurance -- portraying the measure as a historic solution to health-care costs, even as questions emerge about whether the state can afford it. The signing [was] staged with a near-presidential attention to theatrics and slogan-bearing banners...” (David A. Fahrenthold, “Mass. Marks Health-Care Milestone,” *The Washington Post*, 4/13/06)

- **Romney Said Final Legislation “Incorporates About 95 Percent Of My Original Proposal.”** “The final legislation incorporates about 95 percent of my original proposal. So I think, overall, it is a major step forward. We will have health insurance for all our citizens without a government takeover and without new taxes required.” (Jennifer Barrett, “Person Of Faith,” *Newsweek.com*, 6/7/06)

Romney Has Now “Begun To Distance Himself” From His “Signature” Plan. “With signs emerging that his signature healthcare plan faces hurdles, former governor Mitt Romney has begun to distance himself from the new law and is suggesting that Democrats will be to blame if the plan falters. ... At recent political appearances, Romney has subtly lowered expectations for the law he championed as governor.” (Rick Klein, “Boston Globe: Romney Distances Self From Mass. Health Plan,” *The Boston Globe*, 2/3/07)

- **Wall Street Journal: Romney Oversold Virtues Of Healthcare Plan, Imposed Government Mandate And Now Distances Himself From Own Policy.** “[Romney] made a big deal of the health-care ‘reform’ he steered through the Massachusetts legislature last year, and we suppose he deserves credit for trying. But he oversold the results – to the applause of the national health-care lobby – and imposed an insurance mandate without reforming the state insurance market. As it unfolds, this law is turning out to be far from a free-market success. And so now Mr. Romney is distancing himself from it – never mind that he upbraided his critics last year for not understanding its virtues.” (Editorial, “The GOP Field,” *Wall Street Journal*, 2/10/07)
- **Investor’s Business Daily: “He’s Now A Critic Of His Own Biggest Achievement.”** “As governor of Massachusetts he signed a bipartisan law intended to ensure that every resident has coverage. Romney touted it as an innovative free-market solution. Yet these days, Romney ... is much more likely to present his state’s universal coverage law as not a model to copy but an example for other states to learn from. He’s now a critic of his own biggest achievement.” (Sean Higgins, “Ex-Gov. Romney Keeps Distance From His Own Mass. Health Plan,” *Investor’s Business Daily*, 3/7/07)

CLIMATE CHANGE: Romney Once Claimed Global Warming Debate Was “Pretty Much Over” But Now Expresses Skepticism And Attacks His Opponents

Romney In 2003: Global Warming Debate “Is Now Pretty Much Over.” “I think the global warming debate is now pretty much over and people recognize the need associated with providing sources which do not generate the heat that is currently provided by fossil fuels ...” (Jack Coleman, “Massachusetts Governor Urges Use Of Alternative Energy,” *Cape Cod Times*, 3/14/03)

- **Romney:** “I concur that climate change is beginning to effect on our natural resources and that now is the time to take action ...” (“Romney OK With Plan On Emissions,” *Boston Herald*, 7/24/03)

According To Participants, Romney Held 2003 Meeting With Religious Leaders And Said He Was “Terrified” Over Global Warming, Calling It “Quite Alarming.” “Sister Tess Browne, a Roman Catholic nun, said she was particularly moved during the meeting when Romney spoke of his concerns that global warming would jeopardize not just U.S. coastal cities but those in poorer countries, such as Bangladesh. Romney told the group he was ‘terrified’ about global warming, a phenomenon he described as ‘quite alarming,’ according to notes taken by one of the participants, Nancy Davidge of the Episcopal Divinity School at Harvard University.” (Peter Wallsten, “Activists Remember A Different Romney,” *Los Angeles Times*, 3/25/07)

 **In February 2007, Romney Said “Scientists Haven’t Entirely Resolved” Global Warming Question.** “I have to tell you with regards to global warming that that’s something, which, you’re right, the scientists haven’t entirely resolved, but no question about one thing, it’s getting warmer, and a lot of good reasons for us to use less energy, to use it more efficiently and to develop sources here in this country that could allow us to be more independent of foreign sources.” (CNBC’s “Kudlow & Company,” 2/7/07)

Romney Now Says “Some In The Republican Party Are Embracing ... The Ideas Of Al Gore.” “Unfortunately, some in the Republican Party are embracing the radical environmental ideas of the liberal left. As governor, I found that thoughtful environmentalism need not be anti-growth and anti-jobs. But Kyoto-style sweeping mandates, imposed unilaterally in the United States, would kill jobs, depress growth and shift manufacturing to the dirtiest developing nations. Republicans should never abandon pro-growth conservative principles in an effort to embrace the ideas of Al Gore.” (Romney For President, Press Release, 2/23/07)

GAYS IN THE MILITARY: Romney Once Supported And Now Opposes Allowing Gays And Lesbians To Serve Openly In The Military

Romney “Went Out Of His Way” To Court Gay Rights Supporters In ‘94 Senate Run, Said “Certain Privileges” Should Be Offered. “One group [Romney] went out of his way to court [in 1994] was the gay rights community. While he noted that he opposed same-sex marriage, Romney said that ‘certain benefits and privileges should be offered to gay couples and lesbian couples.’ ... He said he would push gay rights issues if elected.” (Dan Balz and Shailagh Murray, “Mass. Governor’s Rightward Shift Raises Questions,” *The Washington Post*, 12/21/06)

In 1994, Romney Endorsed Ability Of Gay Individuals To Serve Openly In Military. “[Romney] called President Bill Clinton’s ‘don’t ask, don’t tell’ military policy ‘the first of a number of steps that will ultimately lead to gays and lesbians being able to serve openly and honestly in our nation’s military.’” (Dan Balz and Shailagh Murray, “Mass. Governor’s Rightward Shift Raises Questions,” *The Washington Post*, 12/21/06)

Romney “Has Since Backed Away” And Now Says He Will Defer To Military Leaders. “Romney has since backed away ... from his previously expansive position on gay people in the military. On that issue, he told National Review Online, he now defers to military leaders.” (Dan Balz and Shailagh Murray, “Mass. Governor’s Rightward Shift Raises Questions,” *The Washington Post*, 12/21/06)

Romney Used To Think “Don’t Ask, Don’t Tell” Policy “Didn’t Make A Lot Of Sense” But Now Supports It. “[Romney] defended his policy switch on gays in the military. He said when he first heard the phrase ‘don’t ask, don’t tell,’ he thought it was ‘kind of a silly phrase that didn’t make a lot of sense.’ But the last 10 years have convinced him that the policy is working and there is no reason to change it, he said.” (Alexa Aguilar, “Romney Campaigns In Chicago,” *Chicago Tribune*, 4/12/07)

GAY MARRIAGE: In 2002, Romney Refused To Endorse Constitutional Amendment Banning Gay Marriage, Saying It Was Too Extreme, But Later Endorsed Amendment Banning Gay Marriage In 2006

Romney Called 2002 Amendment Banning Gay Marriage And Benefits In Massachusetts Too Extreme And Did Not Support It. “Mitt Romney’s wife, son, and daughter-in-law signed a petition in support of a proposed constitutional amendment that would ban both gay marriage and domestic-partner benefits in Massachusetts – an amendment that Romney himself condemned as too extreme after being told of his family’s support for it.” (Rick Klein, “Romney Kin Signed Petition To Ban Same-Sex Marriage,” *The Boston Globe*, 3/22/02)

- **Aide Said Romney Felt The Amendment Was “Unnecessary.”** “Romney’s family members signed the petition to put it on the ballot ‘without reading the fine print,’ [Romney aide Eric] Fehrnstrom said, but he has no reason to believe they do not support it. ‘Mitt did not know they signed it, and Mitt does not support it,’ he said. ‘As far as Mitt is concerned, it goes farther than current law, and therefore it’s unnecessary.’” (Rick Klein, “Romney Kin Signed Petition To Ban Same-Sex Marriage,” *The Boston Globe*, 3/22/02)

In 2006, Romney Backed Efforts To Pass Constitutional Amendment Banning Gay Marriage In Massachusetts. “Just two weeks before lawmakers resume a Constitutional Convention to vote on a proposed ballot initiative to ban same-sex marriage, Gov. Mitt Romney will stand with the supporters of the measure to call on the Legislature to back it. Romney will join petition backers in a State House press event today to urge the Legislature to pass the Protection of Marriage Amendment when the Constitutional Convention reconvenes July 12, authorizing a 2008 ballot question asking voters to define marriage as between one man and one woman.” (Kimberly Atkins and Kate Gibson, “Mitt Joining Supporters Of Anti-Gay Wed Initiative,” *Boston Herald*, 6/28/06)

STEM CELL RESEARCH: Romney Once Endorsed Embryonic Stem Cell Research And Promised To “Work And Fight” For It Before Changing His Position

June 2002: Romney “Spoke Extensively” About His Support For Embryonic Stem Cell Research At Bioethics Forum. “Speaking at a bioethics forum, GOP gubernatorial hopeful Mitt Romney yesterday endorsed embryonic stem cell research ... [Romney] endorsed embryonic stem cell research, saying the controversial science might one day help treat his wife’s multiple sclerosis in addition to numerous other degenerative diseases. ... Romney spoke extensively about his position on stem cell research, which also involves embryo destruction.” (Raja Mishra, “Romney Endorses Stem Cell Research, Is Silent On Cloning,” *The Boston Globe*, 6/14/02)

- **Romney:** “I am in favor of stem cell research. I will work and fight for stem cell research ... I’d be happy to talk to [President Bush] about this, though I don’t know if I could budge him an inch.” (Raja Mishra, “Romney Endorses Stem Cell Research, Is Silent On Cloning,” *The Boston Globe*, 6/14/02)
- **Romney:** “We don’t want there to be any impediment to doing [stem cell] research in Massachusetts, any impediment that would take you to another state.” (Lisa Eckelbecker, “Leaders Deride Drug Imports,” *Telegram & Gazette* [Worcester, MA], 4/30/04)

Romney Later Switched Course – In A Move That “Stunned” Observers – And Pressed To Criminalize Research He Once Endorsed. “At a campaign appearance at Brandeis University in June 2002, Romney strongly endorsed stem cell research. At that event and in several instances since, he declined to offer an opinion on embryo cloning ... But on Feb. 10, 2005 ... Romney came out strongly against the cloning technique ... He vowed to press for legislation to criminalize the work. Romney’s opposition stunned scientists, lawmakers, and observers because of his past statements endorsing, at least in general terms, embryonic stem cell research.” (Scott Helman, “Romney’s Journey To The Right,” *The Boston Globe*, 12/17/06)

Romney’s Stem Cell Views Have “Evolved.” “Romney’s views on stem cell research have evolved over the past five years. ... A few conservatives have questioned whether Romney and his supporters are trying to muddy his views.” (Scott Helman, “Romney’s Stem Cell View May Upset The Right,” *The Boston Globe*, 2/11/07)

FAVORITE BOOK: Romney Insisted L. Ron Hubbard’s “Battlefield Earth” Was His Favorite Novel, Then Said Mark Twain’s “Huckleberry Finn” Was His Favorite

 **On Monday, Romney Said His Favorite Novel Is L. Ron Hubbard’s “Battlefield Earth.”** ROMNEY: “Favorite book... Well, has to be the Bible.” FOX NEWS’ MARTHA MCCALLUM: “And an interesting response to his favorite novel.” ROMNEY: “Actually the one by L. Ron Hubbard, I hate to think ... I’m not in favor of his religion by any means, but he wrote a book called ‘Battlefield Earth’ that was a very fun science fiction book.” (Fox News’ “Fox & Friends,” 4/30/07)

Romney Later Reversed Himself, Saying “Huckleberry Finn” Was Favorite Fiction Book And “Battlefield Earth” Was Favorite Science Fiction Book. “Asked about his comments during a Fox News interview Monday

that L. Ron Hubbard's *Battlefield Earth* is his favorite novel, Romney said Huckleberry Finn is his favorite fiction and that the book by Hubbard, who founded Scientology, is his favorite science fiction reading." (Mary Anne Ostrom, "Education Should Determine Immigrants' Legal Status, Mitt Romney Says," *The [San Jose, CA] Mercury News*, 5/1/07)

Romney Incorrectly Claimed Hubbard Hadn't Yet Founded Scientology When He Wrote "Battlefield Earth." "It's a great science-fiction book ... He hadn't founded Scientology at that point." (Mary Anne Ostrom, "Education Should Determine Immigrants' Legal Status, Mitt Romney Says," *The [San Jose, CA] Mercury News*, 5/1/07)

- **Hubbard Founded Scientology In 1950s.** "A one-time science fiction writer, Mr. Hubbard founded Scientology in the early 1950's." (Edwin McDowell, "Court Halts Distribution Of Hubbard Biography," *The New York Times*, 5/21/98)
- **Hubbard Wrote Battlefield Earth In 1980.** "L. Ron Hubbard wrote *Battlefield Earth* in 1980 as he described it, 'It is the only one I ever wrote to amuse myself. It also celebrates my golden wedding with the muse. Fifty years a professional – 1930–1980.'" (*Battlefield Earth Website*, www.battlefieldearth.com, Accessed 5/2/07)

FAVORITE MOVIE: Romney Has Changed Positions On His Favorite Film In Recent Years

Romney Once Said "O Brother Where Art Thou" Was His Favorite Movie, Now Says It Is "Raiders Of The Lost Ark." "Speaking of Romney, he has been making the rounds on the national TV circuit, providing endless fodder for critics who paint him as a constant flip-flopper. In yet another example, CNN profiled the 2008 presidential field and Romney listed his favorite movie as 'Raiders of the Lost Ark.' But as recently as 2003, Romney told media outlets that his favorite was the George Clooney flick 'O Brother Where Art Thou.'" (Dave Wedge, "Your Mitt Moment, Priceless," *Boston Herald*, 3/4/07)

ANALYSTS ON ROMNEY'S SHIFTING VALUES

BBC's Katty Kay: "[T]his issue of authenticity, he's falling down on that. And if people are looking for something that's authentic, and he has already flip-flopped on his social conservative values, then that's going to be a problem for him." (NBC's "The Chris Matthews Show," 2/11/07)

WFXT-TV's Joe Battenfeld: "[B]efore you see the new Mitt Romney unveil himself here tomorrow, we want to give you a look at the old Mitt Romney." (WFXT's "Fox 25 News At 10," 2/12/07)

- **Battenfeld:** "[W]atch Romney squirm. It's the most revealing look yet at Romney way before his transformation into a pro-life Ronald Reagan wanna-be." (WFXT's "Fox 25 News At 10," 2/12/07)

The Atlantic's Andrew Sullivan: "Romney makes John Kerry look immovable." (Andrew Sullivan, "The Latest Romney Switcheroo II," *TheAtlantic.com's The Daily Dish*, 2/8/07)

- **Sullivan:** "[Romney] makes Bill Clinton look like a rock of principle." (Andrew Sullivan, "Romney's Draft-Deferment," *The Atlantic's The Daily Dish Blog*, 5/11/07)

Democratic Strategist Susan Estrich: "Mitt Romney makes [John] Kerry look like a model of consistency." (Susan Estrich, Op-Ed, "Rudy's Game," *Creators Syndicate*, 2/16/07)

Boston Globe's Scot Lehigh: "Certainly Massachusetts' former governor would present a broad target for the sort of flip-flop attacks that bedeviled John Kerry in 2004." (Scot Lehigh, "United In Ambivalence," *The Boston Globe*, 5/25/07)

Boston Herald's Howie Carr: "Mitt's a lot more adept at doing the old soft shoe around his flip-flops than [John] Kerry." (Howie Carr, Op-Ed, "Mitt's Game Plan Looking Like Flip Side Of Kerry's," *Boston Herald*, 2/9/07)

- **Carr:** "[Romney] was privately against George W. Bush's early tax cuts before he was publicly for them. He was also for gay rights before he was against them, and he supported campaign finance reform before he denounced it. Not to mention he was pro-choice before he was pro-life. He wouldn't sign the local no-new-taxes pledge in 2002 before he signed Grover Norquist's national one in 2007." (Howie Carr, Op-Ed, "Mitt's Game Plan Looking Like Flip Side Of Kerry's," *Boston Herald*, 2/9/07)

National Review's Mark Hemingway: "Romney now claims to be pro-life ... but many find his conversion story far from convincing." (Mark Hemingway, "Mitt Romney's Endurance Race," *National Review Online*, 2/13/07)

American Spectator's "Washington Prowler": "[Romney] appears willing to sell out his core convictions to win." ("Romney's Abortion Positions," *American Spectator's* [AmSpec Blog](#), 2/19/07)

WorldNetDaily.com's Bruce Wilson: "Romney arrived at his pro-life decision in such a backwards manner that it's difficult to take his explanation seriously." (Bruce Wilson, "Mitt Romney's Flip-Flop: Like Father, Like Son?" *WorldNetDaily.com*, 2/13/07)

Political Consultant Paul Begala: "[H]e's not ready for prime time. ... [O]nce again, Mitt stepped in it." (MSNBC's "Imus In The Morning," 3/21/07)

Amb. Richard Blankenship, Former Romney Supporter: "The changes in [Romney's] core beliefs gave rise to some concerns. You have to have an anchor in life." (Adam Smith, "GOP Fundraiser Jumps From Romney To Giuliani," *St. Petersburg [FL] Times*, 3/22/07)

Salt Lake City Mayor and Bush Impeachment Advocate Rocky Anderson (D): "I would fully expect Mitt Romney to distance himself from me, especially now that he's changing his position on so many issues." (Thomas Burr, "Candidate Mitt: Rocky Who?" *Salt Lake Tribune*, 3/23/07)

National Review Online's Yuval Levin: "Flip flops on abortion are a fairly common feature of political resumes in the past few decades. But Romney's flip flops are both more recent and apparently more frequent than most." (Yuval Levin, "Will The Real Mitt Romney Please Stand Up?" *National Review's The Corner*, 2/19/07)

The New Republic's Michelle Cottle: "In modern U.S. politics, it takes work to distinguish oneself as an exceptional opportunist. Romney has met that challenge." (Michelle Cottle, "The Press Makes Too Much Of McCain's Temperament," *The New Republic* [Website](#), 5/25/07)

Human Events' Matt Naugle: "[K]eeping track of Romney's blunders is an overwhelming task." (Matt Naugle, "Romney Bungles Castro Quote In Miami," *Human Events* [Website](#), 3/19/07)

Weekly Standard's Fred Barnes: "[I] don't think [Christian conservatives are] going to be a problem. He has other problems – being from Massachusetts and flip-flopping on issues, those are problems for him." (Fox News' "Special Report," 2/8/07)

The Hill's Dick Morris: "Should the right seek a real alternative to Giuliani, Romney's flip-flops will likely disqualify him." (Dick Morris, Op-Ed, "Hillary And Rudy Could Wrap It Up This Year," *The Hill*, 2/7/07)

Boston Herald's Shelly Cohen: "[Romney] has a spotty record as a fiscal conservative. He has an even spottier record of flip-flopping on social issues." (Fox News' "America's Newsroom," 2/13/07)

Boston Globe's Joan Vennochi: "How much trust can Republican primary voters reasonably invest in a politician who changed so many positions? How good is Romney's word today?" (Joan Vennochi, Op-Ed, "Mitt Romney's Skeletons In The Closet," *The Boston Globe*, 5/27/07)

Roll Call's Mort Kondracke: "[F]lip-flopping is a big issue. [Romney], at one point, refused to sign the no-tax pledge, the Grover Norquist no-tax pledge, now he's signed it. You know, there's just all kinds of changes from Massachusetts to running for national office as a conservative." (Fox News' "Special Report," 2/8/07)

Des Moines Register's David Yepsen: "He's got to shake the implication he's flip-flopped to make himself more appealing to the religious conservatives." (David Yepsen, "Romney Faces Meaty Questions On Social Issues," *Des Moines Register*, 2/13/07)

National Review's Rich Lowry: "For all the trouble the flip-flops have given him, let's face it, we wouldn't even be talking about him if he were a one-term pro-choice former governor of Massachusetts." (Rich Lowry, "Romney And The State Of The Race," *National Review's* [The Corner](#), 2/15/07)

- **Lowry:** "[R]omney doesn't yet have what a top-tier candidates needs, which is a compelling narrative for his candidacy (I didn't hear it in his announcement speech yesterday). Instead, his critics are writing that narrative for him as an opportunist and every time Romney continues to do what he did to get here – move right on everything – it only plays into the negative narrative." (Rich Lowry, "Romney And The State Of The Race," *National Review's* [The Corner](#), 2/15/07)

Washington Post: “This posturing [on hunting] became a particular problem for Mr. Romney in large part because it reinforced the existing narrative of the governor as a politician willing to change his ideological stripes to fit the political environment of the moment.” (Editorial, “Killer Rabbits,” *The Washington Post*, 4/10/07)

Politico’s Elizabeth Wilner: “[Romney] might just be smooth enough to survive this clumsy mess of inconvenient residency and conveniently timed changes of heart.” (Elizabeth Wilner, “Romney Ducks And Dodges Over Mass.,” *The Politico*, 5/29/07)

- **Wilner:** “Abortion. Stem cell research. Immigration. The drip-drip of Romney’s timely conversions to conservative positions goes on.” (Elizabeth Wilner, “Romney Ducks And Dodges Over Mass.,” *The Politico*, 5/29/07)

Syndicated Columnist Deroy Murdock: “With his angular jaw and slicked-back, dark hair, Romney is the GOP’s George Clooney. Who needs the White House? Romney should become a movie star. He already is a skilled actor.” (Deroy Murdock, “Mitt May Only Act Part Of Reagan,” *Boston Herald*, 2/16/07)

- **Murdock:** “Romney is either a rock-ribbed conservative who played a Rockefeller Republican to get elected in Massachusetts, or a limousine liberal portraying a conservative to win the 2008 GOP nomination. This fine thespian has so lost himself in both these roles that no one really knows where the performer ends and the characters begin.” (Deroy Murdock, “Mitt May Only Act Part Of Reagan,” *Boston Herald*, 2/16/07)
- **Murdock:** “Romney should warm up to Reagan. After all, Reagan made it big by moving from acting into politics. Romney’s best bet may be to make that same journey – in reverse.” (Deroy Murdock, “Mitt May Only Act Part Of Reagan,” *Boston Herald*, 2/16/07)

New York Daily News: “Tough to beat GOP presidential aspirant Mitt Romney on sheer opportunism. After flipping his positions on abortion (he had a conversion after looking into stem-cell research), gun control (he’s been a life-long National Rifle Association member since August) and gay marriage (he liked gay Republicans fine when he was running for Massachusetts governor), now he’s flipped on immigration.” (Editorial, “The Many Faces Of Mitt,” *[New York] Daily News*, 5/22/07)

Newsweek’s Evan Thomas and Jonathan Darman: “...Romney’s turnaround on the burning social issues of gay rights, stem-cell research and abortion has raised questions about the candidate’s sincerity – a dangerous doubt at a time when voters seem to crave authenticity.” (Jonathan Darman and Evan Thomas, “Mitt Romney: Too Good To Be True?” *Newsweek*, 2/26/07)

Washington Post’s Richard Cohen: “I have been following the zigs and zags of Mitt Romney, the former Massachusetts governor and now Republican presidential candidate, watching him grow progressively less progressive, sort of making himself up as he goes along.” (Richard Cohen, Op-Ed, “The Talented Mr. Romney,” *The Washington Post*, 2/20/07)

- **Cohen:** “[A] total flip from always legal to always illegal (the clear message he’s sending abortion foes) can have only one explanation: Potomac fever.” (Richard Cohen, Op-Ed, “The Talented Mr. Romney,” *The Washington Post*, 2/20/07)
- **Cohen:** “In fact, to watch Romney ... was to see a thoroughly counterfeit man. If he were a coin, a vending machine would spit him out.” (Richard Cohen, Op-Ed, “The Talented Mr. Romney,” *The Washington Post*, 2/20/07)

National Review’s John Podhoretz: “Romney comes out of nowhere to rise into the first tier of candidates, raises \$6 million in a night, gives a bad speech in his maiden appearance in the right-wing big leagues, chickens out on spelling out a firm position on Iraq, gets tagged as a flip-flopper, loses steam, goes up on the air with an ad to shore up his declining support, and starts frontally attacking other candidates to bring up their negatives.” (John Podhoretz, “Mitt Snit,” *National Review’s The Corner*, 2/21/07)

Washington Post’s Ruth Marcus: “[I]t was also hard to see how a man with deeply held convictions on abortion rights – either for or against – could take a position so calibrated and inconclusive.” (Ruth Marcus, “Mitt Romney’s Extreme Makeover,” *The Washington Post*, 2/21/07)

- **Marcus:** “Listening to Romney that day was like watching a chameleon in the fleeting moment that its color changes to suit its environment.” (Ruth Marcus, “Mitt Romney’s Extreme Makeover,” *The Washington Post*, 2/21/07)

Newsweek: “[Romney] seems to lack good fingertips for the subtleties of politics.” (Evan Thomas et al, “Is Mitt Romney Ready For Prime-Time Politics?” *Newsweek*, 4/16/07)

Associated Press's Liz Sidoti: "Republican Mitt Romney titled his book on how he saved the scandal-ridden 2002 Olympics 'Turnaround.' Now, as he runs for president, he's trying to fight the perception that he's committed a few too many turnarounds." (Liz Sidoti, "Romney Tries To Overcome Inconsistencies," *The Associated Press*, 2/27/07)

- **Sidoti:** "The former Massachusetts governor's equivocations on major issues – and outright position changes on others – threaten to derail his nascent 2008 campaign." (Liz Sidoti, "Romney Tries To Overcome Inconsistencies," *The Associated Press*, 2/27/07)
- **Sidoti:** "As previous White House hopefuls have learned, once a candidate is perceived to have a pattern of inconsistency, labels like flip-flopper and waffler are extremely difficult to shake." (Liz Sidoti, "Romney Tries To Overcome Inconsistencies," *The Associated Press*, 2/27/07)

Slate's Daniel Gross: "For Republican presidential candidate Mitt Romney, the transition from moderate, gay-friendly, abortion-tolerating Massachusetts governor to a certified social conservative isn't going smoothly. YouTube and Google have exposed Romney's shifting policy positions and relatively recent history of liberal behavior." (Daniel Gross, Op-Ed, "The CEO Candidate," *Slate.com*, 2/27/07)

- **Gross:** "Romney's flip-flops have been aggravated by his clumsy responses." (Daniel Gross, Op-Ed, "The CEO Candidate," *Slate.com*, 2/27/07)
- **Gross:** "Disavowing his remarks in the 1994 Kennedy debate, [Romney] said: 'Of course, I was wrong on some issues back then. I think most of us learn with experience.' Yes, as an unformed man of 47, this CEO, father, and multimillionaire was in the thrall of foolish, immature ideas." (Daniel Gross, Op-Ed, "The CEO Candidate," *Slate.com*, 2/27/07)
- **Gross:** "It's not surprising that Romney has fled from his public record and is running to the right. What's surprising is that the man who has usually been so competent is proving to be rather poor at execution, and timing." (Daniel Gross, Op-Ed, "The CEO Candidate," *Slate.com*, 2/27/07)

New York Sun's Ryan Sager: "Mr. Romney, however, somehow got pegged by the national press as 'the smooth one.' They dubbed him Matinee Mitt. Clearly, it's the hair that fooled them. In fact, a study of the campaign so far shows that Mr. Romney is the most gaffe-prone of all the Republican candidates." (Ryan Sager, "Romney's Energy Gaffe," *The New York Sun*, 4/20/07)

The Hill's A.B. Stoddard: "Romney thinks he has found a winner in campaign finance reform. ... Unfortunately, one can readily access enough contradictory statements from Romney's pre-conversion period of his career to find that campaign finance reform is indeed another one of Mitt's Murky Issues." (A.B. Stoddard, "No Momentum For Mitt," *The Hill's Pundits Blog*, 4/26/07)

Democrat Consultant Bruce Reed: "Mitt Romney is the Jay Gatsby of American politics – a fiction within a fiction who was born in the Midwest, made his fortune in the East, and never stops reinventing himself to impress those he meets along the way." (Bruce Reed, "Announcing The Mitt Romney Look-Alike Contest," *Slate's "The Has Been" Blog*, www.slate.com, 5/29/07)

POLITICAL ISSUES

EXECUTIVE SUMMARY

- In late 2002, Romney described himself as “a progressive-on-social-issues governor of Massachusetts.”
- Romney left the state GOP weaker than when he took over as governor, with the party described as being “at its weakest point in years.”
- During 1998 panel on urban issues, Romney addressed need for Boston business communities to work together and claimed “Hillary Clinton is very much right, it does take a village.”
- In 1994, Romney opposed the Contract with America without even reading it.
- Romney has made political contributions to Democratic candidates, saying he places friendship above politics.
- Romney appeared in 2003 TV ad endorsing Democrat Rocky Anderson – who has been outspoken in calling for President Bush’s impeachment over Iraq war – for reelection as Salt Lake City mayor; Romney featured an Anderson testimonial in his own TV ads while running for governor in 2002.
- Romney proclaimed he wasn’t a Republican during the Reagan years, saying “I was an independent during the time of Reagan-Bush. I’m not trying to return to Reagan-Bush.”
- Romney was an independent until deciding to run for the Senate in 1994.
- Romney voted for Paul Tsongas in the 1992 Democratic presidential primary.
- Romney has surrounded himself with policy advisers – like Gregory Mankiw, Vin Weber, Kerry Healey, Bill Weld and more – who do not share his beliefs on key issues.
- Top Romney campaign aides and surrogates have ties to several recent Washington ethics scandals.
- Romney’s spending decisions as chairman of the Republican Governors Association during 2006 election cycle “raised eyebrows” in light of his presidential aspirations.

QUESTIONABLE REPUBLICAN CREDENTIALS

In Late 2002, Romney Described Himself As “Progressive On Social Issues”

Romney Called Himself “A Progressive-On-Social-Issues Governor Of Massachusetts.” “I’ve given my heart and energy to become governor of Massachusetts. I would like to do a good job and beyond that I haven’t a clue ... and I don’t know that the world is pining for a progressive-on-social-issues governor of Massachusetts.” (Joe Battenfeld, “Romney’s Bay State Win Boosts National Image,” *Boston Herald*, 11/10/02)

Romney Claims To Be Recent “Convert” To Social Conservatism

1994 Romney: Pro-Choice, Pro-Universal Health Care, Anti-Contract With America, Supported Gays In The Boy Scouts. “On conservative talk shows, Romney was being derided today for ‘throwing the fight,’ by blurring his differences with the Democrat. Eager to show that he is a moderate independent and no ideologue, Romney stressed his support for universal health insurance and abortion rights, criticized the Republican ‘Contract With America’ promoted by the party’s congressional leaders and, at Faneuil Hall, was more outspoken than Kennedy in arguing that the Boy Scouts should not exclude homosexual youths.” (David Broder, “Once Again, Kennedy’s The One To Beat,” *The Washington Post*, 10/26/94)

“Who Is The Real Mitt Romney...” “Twelve years ago, Romney boasted that he would be more effective in fighting discrimination against gay men and lesbians than Sen. Edward M. Kennedy (D-Mass.), distanced himself from some conservative policies of the Reagan administration, and proudly recalled his family’s record in support of abortion rights. The apparent gulf between the candidate who ran for the Senate in 1994 and the one getting

ready to run for president has raised questions as to who is the real Mitt Romney.” (Dan Balz and Shailagh Murray, “Mass. Governor’s Rightward Shift Raises Questions,” *The Washington Post*, 12/21/06)

Romney Failed In Attempts To Build Up State GOP In Massachusetts

Romney Left The State GOP Weaker Than When He Took Over As Governor. “[Romney’s] efforts to challenge the Democrats and promote Republican candidates for the legislature failed. His partner in the statehouse, Lt. Gov. Kerry Healey, lost a bid to succeed him. And Romney is leaving office with the state GOP weaker than when he arrived.” (David Broder, “Romney Leaving Mass. With Mixed Record,” *The Washington Post*, 11/26/06)

- **Boston Herald’s Brett Arends:** [Romney] left the state GOP dead in the water.” (Brett Arends, Op-Ed, “Mitt Shoots Holes In His Credibility,” *Boston Herald*, 4/11/07)

Romney’s “Major” 2004 Campaign Efforts In Massachusetts Failed Abysmally. “Frustrated by seeing big parts of his program roadblocked, Romney mounted a major effort to change the makeup of the legislature in his midterm election in 2004. He campaigned and financed races in dozens of districts, spending \$3 million, and when the returns came in, Republicans had two fewer seats than before – leaving the Democrats with an overwhelming, veto-proof majority in both the state House and Senate.” (David Broder, “Romney Leaving Mass. With Mixed Record,” *The Washington Post*, 11/26/06)

At End Of Romney Administration, State GOP “At Its Weakest Point In Years.” “Patrick’s victory over Healey marked a kind of repudiation of the Romney legacy in Massachusetts. The Republican Party there, never robust, is now at its weakest point in years.” (David Broder, “Romney Leaving Mass. With Mixed Record,” *The Washington Post*, 11/26/06)

Romney Has Made Political Contributions To Democratic Candidates

Romney Donated To U.S. Rep. Dick Swett (D-NH). “Willard Mitt Romney donated \$250 in 1992 to then-U.S. Rep. Dick Swett’s (D.-N. H.) successful re-election campaign. The one-term congressman served another term before losing to Republican Charles Bass in 1994. Two years later, Swett ran unsuccessfully against Republican Bob Smith for one of the Granite State’s U.S. Senate seats.” (Deroy Murdock, “Mitt Romney’s Swett Problem,” HumanEvents.com, 3/6/07)

- **Romney Aide: “I Think He Was Friendly” With Swett.** “[W]hy did Romney support those Democrats in the first place? ‘I don’t know,’ Madden says. ‘I don’t have an understanding of that. I think he was friendly with Dick Swett.’” (Deroy Murdock, “Mitt Romney’s Swett Problem,” HumanEvents.com, 3/6/07)

Romney Donated To U.S. Rep. John LaFalce (D-NY) And U.S. Senate Candidate Doug Anderson (D-UT). “In 1992, the former Massachusetts governor and current Republican presidential contender also donated \$250 to Rep. John J. La Falce (D.-N.Y.) and \$1,000 to Douglas Delano Anderson, an unsuccessful Democratic primary candidate for the U.S. Senate seat held by Utah Republican Jake Garn, who retired that year.” (Deroy Murdock, “Mitt Romney’s Swett Problem,” HumanEvents.com, 3/6/07)

- **“[H]ow About The \$250 To LaFalce? Madden Replies: ‘I Don’t Know The Particulars Of That Particular Donation.’”** (Deroy Murdock, “Mitt Romney’s Swett Problem,” HumanEvents.com, 3/6/07)

Romney: “I Place My Friendship Above Politics.” “Romney said yesterday he donated to the two congressmen at the request of friends. ‘I place my friendship above politics. I have not been intent on plotting a political resume,’ he said...” (Frank Phillips, “GOP Hopeful Faces Queries From Own Party,” *The Boston Globe*, 2/2/94)

Romney Defended His Donations: “I Don’t Think They’re Mortal Sins.” “Belmont businessman W. Mitt Romney ... defended donations to Democratic congressional candidates in 1992. ‘I don’t think they’re mortal sins for Republicans to make contributions to good people and to their friends, irrespective of their party,’ Romney, 46, told reporters...” (Wayne Woodlief, “Romney: Religion No Issue In Senate Race,” *Boston Herald*, 2/3/94)

Romney Voiced Agreement With Hillary Clinton’s “It Takes A Village” Comment

Boston Globe Reported That During 1998 Panel On Urban Issues, Romney Claimed “Hillary Clinton Is Very Much Right, It Does Take A Village.” “I saw an article recently in Commonwealth magazine where Michael Porter from the Harvard Business School said ... that in Boston, unlike any city he had visited, he said something troubling to me, he said our sectors don’t work together. We seem to view each other with suspicion and

skepticism. ... Hillary Clinton is very much right, it does take a village, and we are a village and we need to work together in a non-skeptical, non-finger-pointing way..." ("For City Problems, Future Solutions," *The Boston Globe*, 3/1/98)

Romney Was An Independent Until Deciding To Run For The Senate In 1994

Romney Considered '94 Senate Run As An Independent Before Dismissing It – Not Because He Wanted To Be A Republican, But Because It Was Impractical. "When Romney decided to run, Republicans exchanged quizzical looks: 'We didn't know a single Republican when we jumped in in December,' his wife, Ann, says. As a registered independent, Romney had voted in the Democratic presidential primary in 1992 to support Paul E. Tsongas (though he backed George Bush in the general election, he says). He briefly considered running for the Senate seat as an independent as well, his wife says, before rejecting the idea as impractical." (Ronald Brownstein, "Kennedy in The Fight Of His Life," *Los Angeles Times*, 10/7/94)

Romney Voted In 1992 Democratic Presidential Primary

Romney Voted For Paul Tsongas In The 1992 Democratic Presidential Primary. "[Romney] wasn't a strong party man. He had been a registered independent all his life. He still was, as he pondered the Kennedy challenge. He had even voted for Paul Tsongas in the 1992 Massachusetts Democratic presidential primary." (Ben Bradlee Jr., "Romney Seeks New Chapter In Success," *The Boston Globe*, 8/7/94)

At The Time, Romney Claimed He Voted For Tsongas Because He Was From Massachusetts And Preferred His Ideas To Those Of Bill Clinton. "Romney confirmed he voted for former US Sen. Paul Tsongas in the state's 1992 Democratic presidential primary, saying he did so both because Tsongas was from Massachusetts and because he favored his ideas over those of Bill Clinton. He added he had been sure the GOP would renominate George Bush, for whom he voted in the fall election." (Scot Lehigh and Frank Phillips, "GOP's Romney Declares, Says Kennedy Out Of Date," *The Boston Globe*, 2/3/94)

Romney Distanced Himself From Ronald Reagan And George H.W. Bush

 **Romney Proclaimed He Wasn't A Republican During The Reagan Years, Adding "I'm Not Trying To To Return To Reagan-Bush."** Kennedy attempted to link Romney several times during the debate to conservatives such as Sen. Jesse Helms (R-N.C.) and accused him of trying to return the country to the policies of the Reagan-Bush administrations. Romney objected to the characterizations, saying: 'I was an independent during the time of Reagan-Bush. I'm not trying to return to Reagan-Bush.'" (Joe Battenfield, "Conservative Group Yanks Its Support For Mitt," *Boston Herald*, 10/27/94)

- **Romney Now Claims To Be A Reagan Republican.** "'Ronald Reagan is one of my heroes,' Romney said as he praised Reagan's strategy for winning the Cold War: 'We win; they lose.'" (Michael Levenson, "Romney Links Gay Marriage, US Prestige," *The Boston Globe*, 2/26/05)

Romney Disavowed Contract With America, Ran Away From GOP For Most Of His Career

Romney Opposed The Contract With America Without Even Reading It. "Republican US Senate hopeful Mitt Romney yesterday distanced himself from a GOP leadership move to rally congressional candidates behind a 'contract with America' – a 10-point manifesto that embraces welfare cuts, tax cuts and a beefed-up military. ... Romney aides, hoping to keep their candidate out of the controversy the contract has generated and as far from Washington politics as possible, said the GOP hopeful, who is seeking to unseat US Sen. Edward M. Kennedy, has not read the document and had no plans to support it." (Frank Phillips And Chris Reidy, "Romney Silent On GOP Plan," *The Boston Globe*, 10/1/94)

Romney Campaigned Against The '94 Republican Agenda. "Mr. Romney, a venture capitalist who has never held elective office, criticized the Republican campaign agenda, the 'Contract With America,' as too partisan. He said he would have gone against the GOP leadership and supported the crime bill, and would oppose a capital gains tax cut." (Rod Dreher, "Kennedy Avoids Haymaker In Final Debate With Romney," *The Washington Times*, 10/28/94)

- **"Romney ... Disassociated Himself From Reagan And Bush Policies And Said He Would Be Independent Of Republican Senate Leaders."** (Editorial, "Kennedy-Romney, One More Time," *The Boston Globe*, 10/27/94)

Romney Supported Abortion Rights And Gays In The Boy Scouts. "Eager to show that he is a moderate independent and no ideologue, Romney stressed his support for universal health insurance and abortion rights ...

and, at Faneuil Hall, was more outspoken than Kennedy in arguing that the Boy Scouts should not exclude homosexual youths. (David Broder, "Once Again, Kennedy's The One To Beat," *The Washington Post*, 10/29/94)

- **"Romney ... Is Socially Liberal In The Tradition Of Many Massachusetts Republicans."** ("Election '94: How The Mighty May Fall," *Christian Science Monitor*, 11/1/94)

Romney Praised Bill Clinton. "Romney used the question to distance himself from the Republican Party leadership in Washington and to paint himself as an independent figure. ... The GOP candidate warmly praised President Clinton. 'I think the president does a lot of things that make a lot of sense,' he said. 'I support him in many ways.'" (Scot Lehigh and Frank Phillips, "Round 2 – Sound Without The Fury," *The Boston Globe*, 10/28/94)

- **"In Texas, Romney Would Be Lynched As A Socialist In No Time."** (Molly Ivins, Op-Ed, "In The East, Even Republicans Sound Liberal On The Stump," *The Sunday Oregonian*, 10/30/94)

1994 Senate Debate: Romney "Praised Kennedy Almost As Much As He Criticized Him." "Last night at Holyoke Community College, [Romney] minded his manners so carefully that he praised Kennedy almost as much as he criticized him. As was the case in Tuesday night's confrontation in Boston's Faneuil Hall, the challenger failed to challenge." (Martin Nolan, "Well-Mannered Challenger Neglects To Offer Challenge," *The Boston Globe*, 10/28/94)

Romney Was Anxious To Accept Over \$550,000 In Funding From National Republicans... "Both parties ... may contribute a maximum of nearly \$559,000 to their Senate candidates in Massachusetts. Carney said Republicans planned to offer Romney the maximum, and when Romney's consultant, Charles Manning, was asked if Romney planned to accept it, he said, 'Yes, yes, yes.' However, Manning said the committee's money would be about all the help Romney would accept from Washington other than individual campaign contributions." (Bob Hohler, "National Parties Plan To Pour Money Into Campaign," *The Boston Globe*, 9/22/94)

...But Refused To Appear With Them On The Trail. "Even Republican national leaders, several of whose aides indicated they were anxious to campaign for Romney, will not be welcome, according to Manning. 'Frankly, we expect all the possible presidential candidates to want to come up and campaign with Mitt, but we plan on quietly saying, 'Thank you, but no thank you,'" he said. 'I don't think there is anyone Washington can send us who is going to help Mitt.'" (Bob Hohler, "National Parties Plan To Pour Money Into Campaign," *The Boston Globe*, 9/22/94)

Prominent Conservative Group Un-Endorsed Romney's 1994 Campaign

"Conservative Victory Committee" Headed By L. Brent Bozell Withdrew Support For Romney In 1994, Saying He Backed A "Left-Wing Agenda" And It Made "No Difference" If Romney Or Kennedy Won. "A national conservative group yesterday attacked Republican U.S. Senate candidate Mitt Romney for espousing a 'left-wing agenda' and urged its followers not to support his candidacy. The group said Romney's nationally televised debate performance against Sen. Edward M. Kennedy showed he is 'anti-family' and running away from conservative Republican themes. 'It makes no difference who wins (the Senate race),' said L. Brent Bozell, executive director of the Conservative Victory Committee, a fiercely conservative fund-raising group. 'Romney is not going to be a fighter for a conservative agenda.'" (Joe Battenfeld, "Conservative Group Yanks Its Support For Mitt," *Boston Herald*, 10/27/94)

- **Bozell: "I'm Sorry We Ever Raised A Penny For His Campaign."** "[Bozell] said he now regrets asking his group members to contribute to Romney because the debate 'demonstrated very clearly that (Romney) has more in common with liberal Democrats than he does with conservatives.' ... 'I'm sorry we ever raised a penny for his campaign,' Bozell said in a statement." (Joe Battenfeld, "Conservative Group Yanks Its Support For Mitt," *Boston Herald*, 10/27/94)
- **Other Conservatives "Also Were Reportedly Upset With Romney" Over His Liberal Positions.** "Other conservative leaders in Washington also were reportedly upset with Romney for voicing support on Tuesday night for gay rights, abortion rights and forcing employers to release information on their hiring record of women and minorities." (Joe Battenfeld, "Conservative Group Yanks Its Support For Mitt," *Boston Herald*, 10/27/94)

Romney Campaign Dismissed Bozell's Group As Right-Wing Organization Perpetrating A "Silly ... Gimmick" To "Try To Get Publicity." "Romney adviser Charles Manning last night dismissed Bozell's group as a right-wing organization that has not been involved in Romney's campaign. 'This is the type of gimmick that groups like this use to try to get publicity and it's really silly,' Manning said." (Joe Battenfeld, "Conservative Group Yanks Its Support For Mitt," *Boston Herald*, 10/27/94)

In 2003, Romney Endorsed Salt Lake City Mayor Rocky Anderson's Reelection Campaign And Appeared In TV Ad For Him – Anderson Is A Liberal Democrat Who Supports Impeaching President Bush

Romney Endorsed Anderson (D) And Appeared In Television Ad Touting Anderson's Virtues. "Governor Mitt Romney, whose first foray into national politics ended in a minor political fiasco last week, is endorsing another out-of-state political figure, but this time, it's a Democrat with left-leaning social positions who is a strong critic of the Iraq war. Romney has made an ad praising Rocky Anderson, the liberal Salt Lake City mayor who is seeking a second term. He praises Anderson's work with him on the 2002 Winter Olympics and gives the mayor credit for playing a big role in saving the once-troubled games." (Frank Phillips, "Romney Backs New Candidate," *The Boston Globe*, 10/7/03)

- **"[Anderson] Has Republican Support Too. There's Mitt Romney Of 2002 Winter Olympic Fame Who Starred In One Of The Mayor's TV Spots."** (Heather May and Linda Fantin, "GOP Strategy: Dump Rocky," *Salt Lake Tribune*, 10/12/03)
- **Romney Spokesman Said Romney's "Very Special" Relationship With Anderson Transcended Politics.** "[A]ides said that, because of their work together, the governor has a 'very special' relationship with Anderson, who endorsed him in the race for governor last year. 'Sometimes personal friendships transcend politics,' said Eric Fehrstrom, Romney's director of communications. 'That is certainly the case with Mitt Romney and Rocky Anderson.'" (Frank Phillips, "Romney Backs New Candidate," *The Boston Globe*, 10/7/03)

Anderson Called For President Bush's Impeachment, Accusing Bush Of "Incredible Abuses Of Power," Misleading Nation Into "Tragic, Unbelievable War" And "Heinous Human Rights Abuses." ANDERSON: "We think if impeachment were ever justified, this certainly is the time ... This president, by engaging in such incredible abuses of power, breaches of trust with both the Congress and the American people, and misleading us into this tragic, unbelievable war, the violation of treaties, either international or our Constitution – our own domestic law, and then his role in heinous human rights abuses, I think all of that together calls for impeachment and certainly would communicate to the rest of the world that is not who we are as the American people." (Alexander Mooney, "Salt Lake City Mayor Calls For Bush's Impeachment," CNN.com, 3/19/07)

- **Anderson:** "[W]hat the founders and those who engaged in the ratification debate had clearly in mind ... is that these are political crimes." (Alexander Mooney, "Salt Lake City Mayor Calls For Bush's Impeachment," CNN.com, 3/19/07)

Anderson Compared Those Standing Behind President Bush To Those Who Stood Behind Hitler. "There are those who have said, 'Stand behind our President, right or wrong.' ... Never has so much evil been perpetuated than from following that call. A culture of blind obedience is a culture of immorality. Nazi Germany was a society comprised of millions of people who did not question and who did not object. They followed. They followed blindly. ... People were not gathering together to say 'No more.' Rather, they were calling out 'Heil Hitler,' abdicating to political leaders the moral choices they each could have – and should have – made as individuals." (Mayor Rocky Anderson, Remarks In Salt Lake City, UT, 4/29/06)

Anderson Is "Key Spokesman" And Honorary Board Member For Pro-Gay Marriage Group Freedom To Marry. "The Salt Lake City mayor recently accepted a post as a 'key spokesman' for a new pro-gay-marriage group called Freedom to Marry. Anderson's duties as a member of the organization's honorary board, known as 'Voices of Equality,' include helping 'end discrimination in civil marriage' and eventually 'influence the decision makers,' according to a letter asking for his support." (Heather May, "Rocky Takes Gay Support National," *Salt Lake Tribune*, 1/23/04)

Anderson "Raised Rainbow Flag Over City Hall." "Rocky Anderson has been the grand marshal of a gay pride parade. He has raised the rainbow flag over City Hall and delivered rousing speeches about gay rights. Now, he has gone national." (Heather May, "Rocky Takes Gay Support National," *Salt Lake Tribune*, 1/23/04)

In 2002, Anderson Appeared In 30-Second Television Ad Endorsing Romney's Campaign For Governor. "Republican Mitt Romney's latest television commercial in his race for governor of Massachusetts features an endorsement from a self-described 'liberal Democrat' – Salt Lake Mayor Rocky Anderson. The former Olympic chief's choice for the 30-second spot is curious, considering that the controversial Anderson is a virtual unknown in Massachusetts, a state where Democrats dominate politics like the GOP does in Utah." (Lisa Riley Roche, "Romney Uses Rocky's Backing," *Deseret News*, 10/15/02)

- **Anderson's Ad: "Take It From This Liberal Democrat ... If You Want An Amazing Leader, Vote For Mitt Romney."** "In the commercial, Anderson introduces himself as a 'proud Democrat.' 'People often say I'm a

Massachusetts-type Democrat. To me, that's a compliment.' ... Then the mayor, who still sports his former longer hairstyle in the commercial, asks viewers to 'take it from this liberal Democrat. If you want an amazing leader, vote for Mitt Romney.'" (Lisa Riley Roche, "Romney Uses Rocky's Backing," *Deseret News*, 10/15/02)

- **Romney Campaign Was "Extremely Pleased" With Anderson's Endorsement And TV Ad.** "We're extremely pleased that (Anderson) has crossed party lines to endorse Mitt's candidacy for governor. People who know Mitt Romney and have worked with him know best what type of governor he will make for the people of Massachusetts,' Fehrstrom said." (Lisa Riley Roche, "Romney Uses Rocky's Backing," *Deseret News*, 10/15/02)

ROMNEY VS. HIS ADVISERS

Romney Has Had To Distance Himself From Prominent Campaign Advisers Who Differ With Him On Critical Issues

Disagreements With His Own Advisers Are "Especially Perilous" For Romney Due To His Inexperience And Charges Of Flip-Flopping. "Such internal philosophical disagreements are especially perilous to Romney, who is fighting charges he himself has flip-flopped over abortion rights, gay rights and embryonic stem cell research, among other topics. ... Outside advisers can help candidates learn the nuances of public policy. That's important for Romney, a former venture capitalist with only one term of elective office on his resume. Topics such as Social Security, the war in Iraq and alternative energy are relatively new to him." (Glen Johnson, "Romney Finds Advisers Both Help And Hurt," *The Associated Press*, 6/19/07)

Romney Aide Kevin Madden Denigrated Level Of Advisers' Contributions To The Campaign. MADDEN: "Advisers are limited to exactly that – advice. Advisers are tasked with helping the process along, but the policy is decided by the boss and the boss in this case is Governor Romney, and what he says goes." (Glen Johnson, "Romney Finds Advisers Both Help And Hurt," *The Associated Press*, 6/19/07)

Immigration Reform: Gregory Mankiw

Gregory Mankiw Is Co-Chair Of Romney Presidential Campaign's Economic Advisory Council. (Romney For President, [Press Release](#), 3/7/07)

In June 2007, Mankiw Authored *Dallas Morning News* Op-Ed With Other Conservative Leaders Supporting Senate Immigration Reform Bill. Conservative leaders co-authoring the column with Mankiw included former Florida Gov. Jeb Bush, former RNC chairman Ken Mehlman, former White House speechwriter Michael Gerson. (Greg Mankiw et al, Op-Ed, "Conservatives: We Must Band Together On Immigration Bill," *Dallas Morning News*, 6/5/07)

- **Op-Ed:** "This is the most far-reaching and thoughtful reform of our immigration system in four decades and one that will significantly enhance American competitiveness. As with any political compromise, improvements can be made. But the basic framework is one that conservatives should support. Indeed, for conservatives who opposed last year's immigration bill, this package represents a step forward." (Greg Mankiw et al, Op-Ed, "Conservatives: We Must Band Together On Immigration Bill," *Dallas Morning News*, 6/5/07)
- **Op-Ed:** "The benefits of the bill far outweigh its shortcomings. We believe it offers the only realistic way forward, and urge conservatives – and all Americans – to embrace the promise it holds out." (Greg Mankiw et al, Op-Ed, "Conservatives: We Must Band Together On Immigration Bill," *Dallas Morning News*, 6/5/07)
- **Op-Ed:** "Is this amnesty? We don't think so. And surely it is in America's interest to know these workers' real names, vet their backgrounds and get them paying their full freight in taxes. Eventually, once the current backlog of legal applicants is cleared, these newly registered workers will have an opportunity to earn citizenship. But this will take at least 13 years and another \$4,000 fine. Heads of households will have to return to their home countries to apply." (Greg Mankiw et al, Op-Ed, "Conservatives: We Must Band Together On Immigration Bill," *Dallas Morning News*, 6/5/07)
- **Op-Ed:** "The Senate package addresses all three needs in a manner that advances conservative values. It will make America safer and restore the rule of law. Indeed, it will make sure that the law is enforced first, before any other provisions of the legislation take effect. A key improvement over last year's bill, the package is built around a set of enforcement benchmarks that must be met before a single guest worker is hired or illegal immigrant legalized." (Greg Mankiw et al, Op-Ed, "Conservatives: We Must Band Together On Immigration Bill," *Dallas Morning News*, 6/5/07)

Romney Had “To Distance Himself” From Mankiw Following Mankiw’s Support For Immigration Bill. “Mitt Romney is happy to get Greg Mankiw’s economic advice – except when it’s economic advice conflicting with immigration advice the Republican presidential contender has also received. Highlighting the challenge a far-flung campaign faces when it comes to message discipline, Romney has had to distance himself from his top economics adviser after Mankiw — a Princeton-trained economist now teaching at Harvard — voiced his support for an immigration bill Romney strongly opposes.” (Glen Johnson, “Romney Finds Advisers Both Help And Hurt,” *The Associated Press*, 6/19/07)

Immigration Reform: Vin Weber

Vin Weber Is Policy Chairman For Romney’s Presidential Campaign. (Romney For President, “Governor Mitt Romney Announces Vin Weber As Policy Chairman,” Press Release, 1/16/07)

Weber And Top Romney Advisor Cesar Conda Signed 2006 *Wall Street Journal* Op-Ed Arguing For “A Guest-Worker Program And Path To Citizenship For Undocumented Workers.” “A number of Romney’s advisers have taken public positions that seem more in tune with his former stance [on immigration] than his current one. Former Minnesota Representative Vin Weber, a Washington lobbyist who is Romney’s policy chairman, and Cesar Conda, an economic adviser who was domestic policy chief for Vice President Dick Cheney, were among several Republicans to sign a July 2006 *Wall Street Journal* opinion article that called for a guest-worker program and path to citizenship for undocumented workers. Greg Mankiw, former chairman of Bush’s Council of Economic Advisers and another top Romney adviser, was responsible for the 2005 economic report of the president that made the case for open borders.” (Heidi Przybyla, “Romney Shifts On Immigration, Sharpening Contrast With McCain,” *Bloomberg*, 3/29/07)

Op-Ed Signed By Weber And Conda In 2006 Argued That “The Only Practical Way To Deal With” The Tough Problem Of Immigration Is “A Comprehensive Solution.” “Conservatives have always prided themselves on acknowledging, in the words of John Adams, that ‘Facts are stubborn things.’ Well, immigration -- both the robust annual flow required to keep our economy growing and the 12 million illegal immigrants already in the country -- is a fact of life in the U.S. today. And the only practical way to deal with these stubborn realities is with a comprehensive solution, one that includes border security, interior enforcement, a guest worker program and status for the illegal immigrants already here.” (Jack Kemp et al, Op-Ed, “A Conservative Statement For Immigration Reform,” *The Wall Street Journal*, 7/10/06)

- **Op-Ed:** “The best way -- the only way -- to realize President Reagan’s vision is through comprehensive immigration reform legislation. We urge the House and Senate to work out their differences and meet the demand of the American people that we act on this critical issue in a comprehensive way.” (Jack Kemp et al, Op-Ed, “A Conservative Statement For Immigration Reform,” *The Wall Street Journal*, 7/10/06)

Immigration Reform: Cesar Conda

Cesar Conda Is A Top Economic Advisor To Romney’s Presidential Campaign. (Dan Balz and Zachary A. Goldfarb, “Economics Experts Join Romney’s PAC,” *The Washington Post*, 11/29/06)

Conda And Romney Campaign Policy Chairman Vin Weber Signed 2006 *Wall Street Journal* Op-Ed Arguing For “A Guest-Worker Program And Path To Citizenship For Undocumented Workers.” “A number of Romney’s advisers have taken public positions that seem more in tune with his former stance [on immigration] than his current one. Former Minnesota Representative Vin Weber, a Washington lobbyist who is Romney’s policy chairman, and Cesar Conda, an economic adviser who was domestic policy chief for Vice President Dick Cheney, were among several Republicans to sign a July 2006 *Wall Street Journal* opinion article that called for a guest-worker program and path to citizenship for undocumented workers. Greg Mankiw, former chairman of Bush’s Council of Economic Advisers and another top Romney adviser, was responsible for the 2005 economic report of the president that made the case for open borders.” (Heidi Przybyla, “Romney Shifts On Immigration, Sharpening Contrast With McCain,” *Bloomberg*, 3/29/07)

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Global Warming: Glenn Hubbard

Glenn Hubbard Is Co-Chair Of Romney Presidential Campaign’s Economic Advisory Council. (Romney For President, [Press Release](#), 3/7/07)

In May 2007, Hubbard Wrote Op-Ed In *Wall Street Journal* Supporting Emissions Trading Program To Combat Global Warming. “The case for action to combat global climate change has grown increasingly compelling in recent years. Sadly the same can not be said for specific proposals to address the problem. Ideas grounded in sound science and good economics have been lacking. One recent change is a proposal to balance a need for policy action with a mechanism for prudent economic risk management. I refer to new recommendations by the National Commission on Energy Policy for an emissions trading program that safeguards the economy. This is the idea behind proposed legislation by Sens. Jeff Bingaman (D., N.M.) and Arlen Specter (R., Pa.) ... Despite this uncertainty, most serious students of climate change believe that the likelihood of adverse climate change is sufficiently great to warrant action. ... The NCEP proposal meets this test of taking serious action while not imposing economic risks greater than the threat of climate change itself. It comprehensively addresses all U.S. emission of CO2 and other climate change-related gases. It does this using one system: tradable permits. In such a system, the use of coal, oil and natural gas will require permits in proportion to their CO2 emissions, typically sold along with the fuel -- so individuals need not deal with the permit market. ... A serious response to climate change must begin by turning our emissions downward without betting the bank. The NCEP proposal does both, and its commitment to measured policy responses adds a breath of economic fresh air.” (R. Glenn Hubbard, Op-Ed, “Capitalism Against Climate Change,” *The Wall Street Journal*, 5/31/07)

Abortion: James Bopp

James Bopp Is Special Adviser On Life Issues To Romney’s Presidential Campaign. (Romney For President, “Governor Mitt Romney Announces Support Of James Bopp, Jr.,” Press Release, 1/30/07)

Bopp Is “Really Not Sure” Where Abortion Fits On Romney’s Agenda, Noting “He’s Still On A Journey.” “Will any of these candidates really advocate to end abortion, or are they just paying lip service on an important issue to the base? ... ‘I don’t know yet about Romney,’ [Romney advisory James] Bopp admits. ‘I’m not really sure where [abortion] will ultimately fit in his agenda. He’s still on a journey.’” (Jonathan Martin, “Abortion Wars (Cont.),” *Politico*, www.politico.com, 2/21/07)

Social Issues: Kerry Healey

Healey Serves As Senior Advisor To Romney’s Presidential Campaign. “Six months after they quietly left office together, former Gov. Mitt Romney and Lt. Gov. Kerry Healey are back on the same team. Healey has joined Romney’s presidential committee as a senior adviser and will travel across the country stumping for the ex-governor in his battle for the 2008 GOP presidential nomination.” (Dave Wedge, “Healey Joins Romney Team To Stump On Campaign Trail,” *Boston Herald*, 6/15/07)

- **Healey Participated In Romney’s Debate Prep For June 5 New Hampshire Debate, Is Pictured In Wolfeboro With Romney And Other Top Advisors.** (Romney For President Website, <http://fivebrothers.mittromney.com>, 6/5/07)

Healey Described As “A Liberal On Social Issues.” “Ms. Healey will run as a liberal on social issues (though she may not be caught using that nowadays-incendiary word) and a conservative on fiscal issues.” (Editorial, “Healey In The Running,” *The Providence Journal*, 2/18/06)

Healey: “I Have Been Very Clear From The Very Beginning Of My Career, And Honestly Throughout My Life, I Am Extremely Pro-Choice.” “Romney, who believes *Roe v. Wade* should be reversed to leave the issue to states to decide, said through a spokeswoman Tuesday that he would sign a South Dakota bill banning abortion, even in cases of rape or incest, if he were governor there. ... ‘I have been very clear from the very beginning of my career, and honestly throughout my life, I am extremely pro-choice,’ Healey said after a Massachusetts Biotech Council forum ... When asked if Romney’s comments were disturbing, Healey said, ‘of

course, but what I am saying is if I were governor I would not have that opinion.” (Kimberly Atkins, “Healey Way Left Of Mitt’s Abort Ban,” *Boston Herald*, 3/2/06)

Healey: “I’m Deeply Committed To Solving Underlying Social Problems Through Government.” “[Healey] describes herself as a fiscal conservative and social moderate. ‘I’m deeply committed to solving underlying social problems through government,’ she said.” (John J. Monahan, “Top Gov. Candidates: Who They Are, What They Say,” *Sunday Telegram* [Worcester, MA], 10/29/06)

As Lieutenant Governor, Healey Made Point Of Noting Her Support For Expanded Access To Morning-After Pill, Civil Unions For Gay Couples And Embryonic Stem Cell Research. “In July 2005, when Romney vetoed a bill expanding access to emergency contraception, Healey said she favored the legislation and had urged the governor to sign it into law. (The legislature later overrode Romney’s veto.) In September 2005, Healey said that although she opposes marriage for gays and lesbians, she backs civil unions – unlike Romney, who’s against both. And in February, before a Massachusetts Biotechnology Council forum in Cambridge, the Healey campaign issued a statement noting that the LG supports embryonic stem-cell research; in 2005, Romney vetoed (unsuccessfully) a bill aimed at bolstering such research.” (Adam Reilly, “Hard Sell,” *The Phoenix* [Boston, MA], 3/10/06)

Healey Criticized Catholic Charities For Seeking Exemption From Gay Adoption Mandate. “Healey’s moderate stylings reached new heights last week. When Romney indicated, through a spokeswoman, that he would have signed South Dakota’s new abortion ban – which allows for exception only to save a woman’s life – Healey termed herself ‘extremely pro-choice.’ Then, for good measure, she rapped Catholic Charities’ push for permission to cease working with would-be adoptive parents who are gay and lesbian: such an exemption, she said, would almost certainly be illegal.” (Adam Reilly, “Hard Sell,” *The Phoenix* [Boston, MA], 3/10/06)

- **Healey Backed State Law Requiring Catholic Charities To Consider Gay Couples As Adoptive Parents, Saying Institution Had To “Abide By The Laws Of This State.”** “In another break with her boss, Lt. Gov. Kerry Healey said Thursday she wouldn’t support any legislation to exempt Catholic social services agencies from a law requiring them to consider gays as adoptive parents. ... She said she wouldn’t lobby for an exemption for the church or support any legislation that provides it. ‘I believe that any institution that wants to provide services that are regulated by the state has to abide by the laws of this state, and our anti-discrimination laws are some of the most important,’ Healey said.” (Jay Lindsay, “Healey Breaks With Romney On Gay Adoption Exemption,” *The Associated Press*, 3/2/06)
- **Healey Warned Exempting Catholic Group Would Threaten One Of “The Most Important Principles Of Our Society ... The Issue Really Is The Proper Division Between Church And State.”** “[T]he lieutenant governor warned that giving Catholic Charities an exemption from the state’s anti-discrimination law when it comes to placing adoptive children with gay parents threatens one of ‘the most important principles of our society.’ ‘The issue really is the proper division between church and state,’ Healey said.” (Steve LeBlanc, “Healey Jettisons Romney Legacy On Social Issues,” *The Associated Press*, 3/17/06)

In 2006, Healey “Distanced Herself” From Romney’s New-Found Conservatism And Appeared At Abortion-Rights Gathering After Accepting State Party Endorsement For Governor. “Romney, whose reception by the crowd was muted compared with the rousing reception he got at the 2002 convention, called on activists to rally behind Healey. He described himself as ‘personally prolife’ last year, while Healey has distanced herself from his conservative stances and his style of governing. She appeared at a GOP abortion-rights gathering yesterday after the convention.” (Frank Phillips and Scott Helman, “I Ask You To Stand With Us In This Election,” *The Boston Globe*, 4/30/06)

Healey Was Not A Registered Republican Until Deciding To Seek Her First State Office In 1998. “[Healey] lived in Beverly three years before deciding to take a run for state representative in 1998. She switched from an unenrolled voter to the Republican Party to challenge a Democratic incumbent and lifelong resident of the town. She lost badly, with 30 percent of the vote, but tried again in 2000, losing with 36 percent.” (John J. Monahan, “Top Gov. Candidates: Who They Are, What They Say,” *Sunday Telegram* [Worcester, MA], 10/29/06)

Healey Disagreed With Romney’s Decision To Veto Measure Requiring \$75 Registration Fee For Sex Offenders And Subsequent Veto Of \$750,000 Toward Reducing Sex Offender Classification Backlog. “[Healey] said she disagreed with Romney’s decision in 2003 to veto a \$75 fee that would have been imposed on convicted sex offenders. She also said she disagreed with another veto to spend \$750,000 collected from the fees to reduce a backlog of sex offenders waiting at the time to be classified by the state. The Legislature overrode those vetoes. ... ‘No, I did not,’ Healey said when asked if she supported Romney’s vetoes.” (Glen Johnson, “Healey Signs Sex Crimes Statute Extension Into Law,” *The Associated Press*, 9/21/06)

Healey “Declined To Endorse” Romney’s Claim On How Much He Raised Fees As Governor. “[Healey] called Patrick’s charge that the Romney-Healey administration raised taxes and fees by \$985 million ‘ridiculous,’ although she declined to endorse a \$260 million figure cited Tuesday by Gov. Mitt Romney.” (Casey Ross, “Gov Rivals Spar Over Taxing Topic,” *Boston Herald*, 9/28/06)

Social Issues: Bill Weld

Former Massachusetts Gov. Bill Weld “Has Emerged As A Major Backer Of Mitt Romney,” Serves As Campaign’s New York State Co-Chair. “Former Massachusetts governor William F. Weld has emerged as a major backer of Mitt Romney, despite a long friendship with Rudolph W. Giuliani, the former New York City mayor who is a potential Romney rival in the race for the 2008 Republican presidential nomination. ... Weld is cochairman of Romney’s campaign in New York state.” (Brian C. Mooney, “Weld Backs Romney For Oval Office,” *The Boston Globe*, 1/9/07)

- **Weld Participated In Romney’s Debate Prep For June 5 New Hampshire Debate, Is Pictured In Wolfeboro With Romney And Top Advisors.** (Romney For President Website, <http://fivebrothers.mittromney.com>, 6/5/07)

Weld Strongly Opposed Putting Gay Marriage Ban On Massachusetts Ballot In 2008, Calling It A “Distraction.” “Former Gov. William F. Weld ... said Tuesday he hoped legislators would vote this week to kill a proposed constitutional amendment banning gay marriage in Massachusetts. Weld, in the Statehouse on behalf of Lehman Brothers, an investment banking firm, said: ‘I hope it doesn’t go on the ballot.’ He said if a constitutional convention votes Thursday to allow the measure on the November 2008 ballot, ‘I think it’s going to be a distraction for the next 18 months.’ Weld was an avid supporter of gay rights while serving as governor from 1991 to 1997, and he later attended the wedding of his former chief of staff, Kevin Smith, who is gay.” (“Former Governor Weld Says He Hopes Gay Marriage Ban Defeated,” *The Associated Press*, 6/12/07)

- **Weld “Supports Abortion Rights And Gay Marriage.”** (Michael Gormley, “Weld Drops Out Of New York Governor’s Race,” *The Associated Press*, 6/6/06)

In June 2007, Weld Lobbied GOP State Legislator Against Amendment Allowing Voters To Decide On Gay Marriage In State. “With the Constitutional Convention just hours away, a proposal to allow voters to decide the future of same-sex marriage in Massachusetts was hanging by a thread in the Legislature last night. ... Some unexpected movement could come in the Senate, where an overwhelming majority, 32 of 40 members, voted last year to block the amendment from the ballot. Two more senators, Democrat Michael Morrissey of Quincy and Republican Robert Hedlund of Weymouth, are now saying they are reconsidering and may oppose sending the amendment to the voters. ... Some of the state’s major political figures have joined with Patrick, DiMasi, and Murray. US Senator Edward M. Kennedy has placed calls to Democratic legislators. Former governor William F. Weld, a Republican who was an early advocate of gay rights, also reached out to at least one GOP lawmaker, placing a call to Hedlund.” (Frank Phillips, “Tight Vote Looms On Same-Sex Marriage Lobbying Intense On Both Sides,” *The Boston Globe*, 6/14/07)

Weld Appointed Judge Who Wrote Opinion Legalizing Gay Marriage In Massachusetts, Said He Was “Proud And Happy” With Her Stand On Gay Marriage. “Weld said he was ‘proud and happy’ Supreme Judicial Court Chief Justice Margaret Marshall, whom he appointed, took a stand backing gay marriage so ‘we could all be here today.’” (Ann E. Donlan, “GOP: Gay Old Party,” *The Boston Herald*, 6/23/04)

Weld Endorsed Court’s Gay Marriage Decision, Later Officiated At Same-Sex Wedding. “In 2003, shortly after the state Supreme Judicial Court delivered the ruling that led to the practice of gay marriage here, Weld endorsed the decision, and later officiated at a same-sex marriage.” (*Statehouse News Service*, 6/12/07)

In 1994 Senate Race, Romney Was Described As A Virtual Clone Of Weld. “If anyone is more like Bill Weld than Mitt Romney, it is not for lack of effort on Romney’s part. ... Ask Weld where he stands on taxes, on capital punishment, on welfare reform, on abortion, on gay rights, on the role of government, on term limits. The answers he gives will save you a call to Romney headquarters, for the GOP Senate nominee mirrors Weld right down the line.” (Don Aucoin, “Seeking Star Power Of His Own, Romney Teams Up With Weld,” *The Boston Globe*, 10/21/94)

- **Romney’s Deference To Weld’s Positions “Verg[ed] On The Comical.”** “At times Romney’s deference to Weld verges on the comical, as when he recently answered a question on gay marriage by saying: ‘I am sure Weld will study it and evaluate it and I will endorse his position on that.’” (Don Aucoin, “Seeking Star Power Of His Own, Romney Teams Up With Weld,” *The Boston Globe*, 10/21/94)

ABORTION: Jennifer Dunn

Romney Has Named Former Rep. Jennifer Dunn (R-WA) To Top Advisory Role On His Presidential Campaign. “Today, Governor Mitt Romney announced that former Congresswoman Jennifer Dunn (R-WA) will serve as a National Co-Chair of Women for Mitt. Congresswoman Dunn will help organize the National Women for Mitt effort and spread Governor Romney’s message of strong conservative leadership. She will also serve as Washington State Honorary Finance Chair.” (Romney For President, Inc., Press Release, 6/26/07)

- **Romney: Dunn Has “Deep Understanding Of The Important Issues Of Our Day.”** ROMNEY: “For twelve years, Congresswoman Dunn served the people of her district by championing the cause of a stronger America. I am confident that her deep understanding of the important issues of our day will provide an invaluable service to my campaign and help spread my message across Washington state and the country.” (Romney For President, Inc., Press Release, 6/26/07)

Dunn Has Faced Past Scrutiny From Conservatives For Being Pro-Choice. “Republicans will try to bridge conflicts among personalities, ideologies and competing interest groups when they assemble Nov. 18 to elect their new House leadership team in the post-Gingrich era. ... Rep. Jennifer Dunn of Washington state faces opposition from some GOP conservatives because she is pro-choice on abortion.” (Ralph Z. Hallow, “GOP Leadership Candidates Represent Array Of Interests,” *The Washington Times*, 11/9/98)

Dunn Claimed “Labels” Such As Pro-Choice Or Pro-Life Are Part Of The “Problem” In Abortion Debate. CNN’s ROBERT NOVAK: “Most people are either – call themselves either pro-choice for pro-life. Which are you?” DUNN: “Well I think those labels are half the problem in our discussion of a tough issue like this. I’m a libertarian and that just means government shouldn’t get in on either side in this issue. I don’t think we shouldn’t [sic] spend people’s taxpayer money to pay for abortions. You can leave that to groups Planned Parenthood, private groups.” (CNN’s “Evans, Novak, Hunt & Shields,” 11/14/98)

In 2001, Dunn “Emerges As One Of The Leaders” In Effort To Convince President Bush To Allow Federal Funding For Embryonic Stem Cell Research. “Washington Rep. Jennifer Dunn, a Republican conservative with close ties to President Bush, has emerged as one of the leaders in the effort to convince the White House to allow continued federal funding for embryonic stem cell research. ... Dunn declined Wednesday to talk about her support for the research. But she spearheaded a letter to Bush signed by 37 other Republican House members ... urging the president not to ban federal funding. ‘We know there is great pressure from some to change the current policy,’ the letter said. ‘But we truly believe that such a change would not be in the interests of the health and welfare of the people we represent.’” (Les Blumenthal, “Dunn Lobbies White House To Continue Stem Cell Research Funding,” *Scripps Howard News Service*, 7/11/01)

In Addition To Lobbying The President, Dunn Also Spoke With Then-HHS Secretary Tommy Thompson And Adviser Karl Rove About Funding Embryonic Stem Cell Research. “Dunn has also talked with the secretary of health and human services, Tommy Thompson, and presidential adviser Karl Rove about funding for the research. ... Tom Alexander, a Dunn spokesman, said the congresswoman didn’t want to discuss the issue and declined to release a copy of the letter, which was obtained elsewhere by McClatchy Newspapers. ‘The letter was intended to be private correspondence between her, her colleagues and the president,’ Alexander said. ‘She has been on record supporting this research that could help millions of Americans.’” (Les Blumenthal, “Dunn Lobbies White House To Continue Stem Cell Research Funding,” *Scripps Howard News Service*, 7/11/01)

Pro-Life Advocate: Dunn “Disappoints The Pro-Life Movement And Always Has.” “‘We’re not surprised,’ Dan Kennedy, the chief executive officer of Human Life of Washington, said of Dunn’s support for embryonic stem cell research. ‘Jennifer Dunn has a lot of good qualities, but she disappoints the pro-life movement and always has.’” (Les Blumenthal, “Dunn Lobbies White House To Continue Stem Cell Research Funding,” *Scripps Howard News Service*, 7/11/01)

REPUBLICAN GOVERNOR’S ASSOCIATION

Romney’s Fundraising Ability Led Him To Be Selected To RGA Leadership In 2004, Assumed Chairmanship For 2006 Cycle

Romney’s Fundraising Prowess Reportedly Led To His Selection As RGA Vice Chairman In 2004, “Putting Him In Line To Head The Politically Influential Organization As He Weighs Whether To Run For President In 2008.” “Governor Mitt Romney is expected to be chosen vice chairman of the Republican Governors Association this week, putting him in line to head the politically influential organization as he weighs whether to

run for president in 2008, GOP strategists said yesterday. Romney, who has helped the organization raise more than \$1 million from Massachusetts corporations, would be in a position to become chairman of the association in 2006, offering him access to a national network of governors and Republican-leaning donors. ... [S]everal GOP strategists pointed out that Romney has helped raise money for it. Romney cochaired a fund-raiser for the group on Feb. 23 in Washington that featured President Bush. He also hosted a fund-raiser in Boston in fall 2003. Massachusetts corporations and companies with a major presence in the Bay State have stepped up their donations to the governors' association significantly since Romney was elected in 2003, campaign finance records show. Donors include MassMutual Financial Group, which has given more than \$300,000 over the last two years, and Fidelity Investments, which contributed \$185,000." (Frank Phillips and Yvonne Abraham, "GOP Governors Eye Romney For Post," *The Boston Globe*, 11/16/04)

Romney Used RGA To Expand His Donor Base And Collect Presidential Chits

Romney Endured Criticism Throughout 2006 Election Season For Using RGA Chairmanship To Advance His Own Presidential Ambitions. "As chairman of the Republican Governors Association, Mitt Romney has directed the organization's largest contributions to candidates in three states that are key to any presidential run, enhancing his exposure in politically important precincts as he prepares for a 2008 run for president. The heavy investment in those three states -- Florida, Michigan, and Iowa -- underscores the extent to which Romney is using the governors' association to build his presidential résumé. Romney is traveling the nation under the auspices of the association and getting to know the deep-pocketed donors who play crucial roles in presidential candidacies." (Rick Klein, "Romney Directs GOP Cash To Campaign States," *The Boston Globe*, 10/1/06)

Romney's Decision To Spend Millions Of RGA's Money Under Strategically Questionable Circumstances In Florida, Michigan And Iowa "Raised Eyebrows In Political Circles"

Romney Donated \$1 Million To Charlie Crist (R-FL), Even Though Crist Held A 3-1 Cash Lead Over His Opponent. "[S]ome of the choices of where to send the association's money have raised eyebrows in political circles. Two weeks ago, Romney traveled to Florida to deliver a \$1 million check to Republican gubernatorial nominee Charlie Crist, even though polls have shown Crist holding a steady lead. Even without the governors' association's contribution, Crist had nearly tripled the fund-raising kitty of his opponent, Democrat Jim Davis, suggesting the association's money might be better spent in other contests." (Rick Klein, "Romney Directs GOP Cash To Campaign States," *The Boston Globe*, 10/1/06)

Romney Donated \$1 Million To Dick DeVos (R-MI), Who Had Already Given \$16 Million To His Own Campaign. "Also getting \$1 million is Dick DeVos, who is running for governor in Michigan, a closely divided state that holds early presidential primaries -- and where Romney's father served as governor. Though DeVos's race against Democratic Governor Jennifer Granholm is tight, DeVos is hardly strapped for cash, since he has already pumped more than \$16 million of his Amway fortune into the race." (Rick Klein, "Romney Directs GOP Cash To Campaign States," *The Boston Globe*, 10/1/06)

- **Cook Political Report's Jennifer Duffy:** "We laughed at the Michigan money ... It's like Romney's third home state, after Utah and Massachusetts." (Rick Klein, "Romney Directs GOP Cash To Campaign States," *The Boston Globe*, 10/1/06)

Romney Gave An Unusually Large Donation Of \$750,000 To Jim Nussle (R-IA). "Romney is directing about \$750,000 to Iowa, where Representative Jim Nussle, the chairman of the House budget committee, is locked in a campaign that's widely considered a toss-up. While the tightness of the election makes the state a good target for governors' association money, the donation is noteworthy for its size, given that Iowa is a sparsely populated state with low advertising costs." (Rick Klein, "Romney Directs GOP Cash To Campaign States," *The Boston Globe*, 10/1/06)

CAMPAIGN ETHICS

Jason Roe, Romney Deputy Campaign Manager And Former Chief Of Staff To Rep. Tom Feeney, "Resigned Abruptly" Amid Disclosure Of Abramoff Ties

Jason Roe, Former Feeney Chief Of Staff, "Resigned Abruptly" From Position As Romney Deputy Campaign Manager After FBI Inquiries Into Abramoff Ties. "The document the FBI has requested from the Times is an e-mail from Feeney's former chief of staff, Jason Roe, who was answering questions about the Scotland trip last year. Roe resigned abruptly Tuesday from his new job as deputy campaign manager for presidential candidate Mitt Romney." (Anita Kumar, "Cost Hidden For Feeney Trip," *St. Petersburg Times*, 4/25/07)

- **Roe “Functioned As The Campaign’s Top Daily Operating Officer.”** “Ex-MA Gov. Mitt Romney’s deputy campaign manager has resigned, a Romney aide confirmed to the Hotline Tuesday. Jason Roe, who functioned as the campaign’s top daily operating officer, told campaign officials today that he planned to leave.” (Marc Ambinder, “*National’s Journal’s* Hotline “On Call” Blog, “Romney’s Deputy Campaign Manager Resigns,” hotlineblog.nationaljournal.com, 4/24/07)

FBI Contacted Newspaper Inquiring About Roe’s Role In Abramoff Scandal. “The FBI contacted the Times last week to ask for the February 2006 email that Feeney’s then chief of staff Jason Roe wrote to the newspaper in response to a series of questions about interactions between Feeney and Abramoff. The Times has referred the FBI’s request to its attorney.” (Anita Kumar, “Feeney’s Office Said The Congressman Is Cooperating Voluntarily,” *St. Petersburg Times*, 4/23/07)

- **In 2005, “Roe Vehemently Denied Any Improper Relationship With Abramoff.”** “‘Any assertion that this office knew Abramoff paid for the Scotland trip is a g--d----- lie,’ Roe wrote in the email being sought by the FBI. The email was quoted in a newspaper article last year. In last year’s email, Roe vehemently denied any improper relationship with Abramoff as a result of the trip.” (Anita Kumar, “Feeney’s Office Said The Congressman Is Cooperating Voluntarily,” *St. Petersburg Times*, 4/23/07)

Rep. Tom Feeney, Traveled On Controversial Scottish Golf Vacation With Abramoff, Contacted By FBI About Role

Rep. Tom Feeney Serves On Romney’s “Congressional Whip Team.” (Romney For President, “Governor Mitt Romney Announces Congressional Whip Team,” Press Release, 2/6/07)

Rep. Feeney Took 2003 Scottish Golf Vacation Funded By Abramoff, Disclosed Only \$5,000 Of \$20,000 In Expenses. “Lobbyist Jack Abramoff treated Rep. Tom Feeney and others to a Scotland trip in 2003 that began with a trans-Atlantic flight on a private jet and featured twice-daily golf at world-famous locales. New court documents released Tuesday show Abramoff’s expenses for the luxury trip averaged about \$20,000 per person for each of the eight people who went, not the \$5,000 Feeney estimated in the travel report he filed in Congress.” (Anita Kumar, “Cost Hidden For Feeney Trip,” *St. Petersburg Times*, 4/25/07)

- **Feeney Disclosure Filing Mirrored Congressional Aide Who Pled Guilty To Conspiracy.** “A guilty plea entered Tuesday by former congressional aide Mark Zachares revealed new details about the extravagant four-day trip that illustrated the influential reign of Abramoff, now in prison for defrauding clients. Zachares pleaded guilty to conspiracy and admitted in documents, among other things, that the travel report he filed upon returning from Scotland was filled with lies that were coordinated by Abramoff. Zachares had said the trip was paid for by a conservative think tank, the National Center for Public Policy Research, that it had cost \$5,643 and that the purpose was fact finding. All three were lies, according to the documents. Feeney, 48, an Orlando-area Republican who has been contacted by the FBI as part of the Abramoff investigation, reported precisely the same details in his travel report on the Scotland trip.” (Anita Kumar, “Cost Hidden For Feeney Trip,” *St. Petersburg Times*, 4/25/07)

FBI Contacted Feeney About Role In Abramoff Investigation, Requested Documents From Local Newspaper. “The FBI has asked U.S. Rep. Tom Feeney for information about his dealings with Jack Abramoff as part of its ongoing investigation into the lobbyist convicted of defrauding clients. FBI agent Kevin Luebke refused to say whether Feeney, a Republican from the Orlando area, is under federal investigation. Federal agents also have asked the *St. Petersburg Times* for an email sent to the newspaper by Feeney’s office describing a golfing trip the congressman took with Abramoff to Scotland in 2003.” (Anita Kumar, “Feeney’s Office Said The Congressman Is Cooperating Voluntarily,” *St. Petersburg Times*, 4/23/07)

- **“Feeney’s Office Released A Statement To The *St. Petersburg Times* On Monday Acknowledging That He Has Been Contacted By The FBI In The Inquiry.”** (Anita Kumar, “Cost Hidden For Feeney Trip,” *St. Petersburg Times*, 4/25/07)

“The Documents Filed In U.S. District Court In Washington Refer To Feeney, The Only Current Member Of Congress To Have Gone On The Four-Day Trip, As ‘Representative #3.’” (Anita Kumar, “Cost Hidden For Feeney Trip,” *St. Petersburg Times*, 4/25/07)

- **Three Congressmen Took Abramoff Golfing Trip: Feeney, Former Rep. Tom DeLay, And Former Rep. Bob Ney, Now Serving Jail Time For Abramoff Related Corruption.** “Feeney, once the speaker of the Florida House, is one of three men who were U.S. House members when they accompanied Abramoff to Scotland on trips that included rounds of golf at the legendary Royal & Ancient Golf Club at St. Andrews. The

others are former Rep. Bob Ney, R-Ohio, who is serving prison time for corruption related to his Abramoff relationship, and former House Republican Leader Tom DeLay, indicted in an unrelated Texas case for alleged improper fundraising, is under investigation.” (Anita Kumar, “Cost Hidden For Feeney Trip,” *St. Petersburg Times*, 4/25/07)

Rep. Dennis Hastert, Under Scrutiny For Ties To Abramoff, Criticized Criticized For “Insufficient Attention” To Corruption In Congress

Rep. Dennis Hastert Serves On Romney’s “Congressional Whip Team.” (Romney For President, “Governor Mitt Romney Announces Congressional Whip Team,” Press Release, 2/6/07)

Hastert Held Fundraiser At Abramoff’s Restaurant One Week Before Writing Letter For His Clients. “House Speaker Dennis Hastert, R-Ill., held a fundraiser at Abramoff’s Signatures restaurant in Washington on June 3, 2003, that collected at least \$21,500 for Hastert’s Keep Our Majority political action committee from the lobbyist’s firm and tribal clients. Seven days later, Hastert wrote Norton urging her to reject the Jena tribe of Choctaw Indians’ request for a new casino.” (John Solomon, “Lawmakers Pressured Interior While Getting Large Donations,” *The Associated Press*, 11/18/05)

- **“Hastert Failed For Two Years To Disclose His Use Of Abramoff’s Restaurant The Week Before His Letter Or To Reimburse For It As Legally Required. Hastert Blames A Paperwork Oversight And Recently Corrected It.”** (John Solomon, “Lawmakers Pressured Interior While Getting Large Donations,” *The Associated Press*, 11/18/05)

“Hastert Was Criticized For Insufficient Attention To Ethical Lapses That Eventually Embroiled The Party In A Series Of Corruption Scandals And Helped Turn Voters Against Republicans.” (Mike Dorning and Christi Parsons, ‘Accidental Speaker’ Calls It Quits,’ *Chicago Tribune*, 11/9/06)

- **Hastert Presided Over Fall Of Reps. Cunningham And Ney.** “On Hastert’s watch, [former Rep. Duke] Cunningham pleaded guilty to accepting millions in bribes from government contractors and [former Rep. Bob] Ney agreed to plead guilty to corruption in the influence-peddling case involving Abramoff.” (Bob Dart, “Scandal Makes Hastert Newly Vulnerable,” *Cox News*, 10/8/06)
- **Hastert Failed To Come Down On Rep. DeLay Amid Ethical Scandals.** “[Hastert] dismissed the House Ethics Committee chairman after it admonished then-Majority Leader Tom DeLay (R-Texas) and hesitated to press for DeLay’s resignation after the Texan became embroiled in the Jack Abramoff lobbying corruption scandal.” (Mike Dorning and Christi Parsons, ‘Accidental Speaker’ Calls It Quits,’ *Chicago Tribune*, 11/9/06)

House Ethics Committee “Harshly Criticized” Hastert For Role In Foley Scandal. “The [Ethics Committee report on the Foley Scandal] harshly criticized Speaker Dennis Hastert, R-Ill., saying the evidence showed he was told of the problem months before he acknowledged learning of Foley’s questionable e-mails to a former Louisiana page. It rejected Hastert’s contention that he couldn’t recall separate warnings from two House Republican leaders.” (Larry Margasak, “Panel Blasts Hastert In Foley Scandal,” *The Associated Press*, 12/9/06)

- **“[I]nvestigators Said Evidence Supports The Conclusion That Hastert’s Top Aide Had Been Told About Foley’s Conduct In Late 2002 Or Early 2003.”** (Larry Margasak, “Foley Panel: GOP Didn’t Protect Pages,” *The Associated Press*, 12/9/06)
- **Ethics Committee Report:** “The Investigative Subcommittee finds a significant number of instances where members (of Congress), officers or employees fails to exercise appropriate diligence and oversight, or should have exercised greater diligence and oversight, regarding issues arising from the interaction between former Rep. Mark Foley and current or former House pages.” (Larry Margasak, “Foley Panel: GOP Didn’t Protect Pages,” *The Associated Press*, 12/9/06)

Grover Norquist Tied To Jack Abramoff Scandal For Laundering Indian Tribe Funds Through Organization

Grover Norquist “Signaled Approval Of Romney By Introducing Him” At CPAC. “Grover Norquist, president of Americans for Tax Reform, has not endorsed a candidate, but he signaled approval of Romney by introducing him at the annual Conservative Political Action Conference in Washington last month.” (Molly Hennessey-Fiske, “GOP Candidates Face Litmus Test: Tax Cuts,” *Los Angeles Times*, 4/9/07)

Norquist’s Americans For Tax Reform Used As “Conduit” For Funds From Abramoff’s Clients To “Surreptitiously Finance Grass-Roots Lobbying Campaigns.” “Among the organizations used by Abramoff

was Norquist's Americans for Tax Reform. According to an investigative report on Abramoff's lobbying released last week by the Senate Indian Affairs Committee, Americans for Tax Reform served as a 'conduit' for funds that flowed from Abramoff's clients to surreptitiously finance grass-roots lobbying campaigns. As the money passed through, Norquist's organization kept a small cut, e-mails show." (Susan Schmidt and James V. Grimaldi, "Nonprofit Groups Funneled Money For Abramoff," *The Washington Post*, 6/25/06)

- **Norquist And Staff Advocated For Abramoff Clients In Public Without Disclosing Encouragement From Abramoff.** "The e-mails also show that Norquist and his staff -- along with the leaders of other groups - were encouraged to submit newspaper pieces and news releases, which Abramoff offered to draft, advocating for Abramoff clients. ... Abramoff e-mails show him encouraging Norquist and Americans for Tax Reform and other organizations to become active on behalf of his client. In 2000, the Washington Times published a Norquist op-ed piece touting Channel One." (Tom Hamburger, "Abramoff Ties May Jeopardize Nonprofits' Tax Status," *Los Angeles Times*, 10/13/06)
- **"[Abramoff Used] Americans For Tax Reform To Hide The Fact That Indian Tribes With Gambling Casinos Were The Source Of Funds For Campaigns Opposing State Gambling Enterprises."** (Tom Hamburger, "Abramoff Ties May Jeopardize Nonprofits' Tax Status," *Los Angeles Times*, 10/13/06)

Barbara Comstock Defended Scooter Libby, Tom DeLay, Jerry Lewis In Corruption Cases

"An Adviser To Romney's Political Action Committee, Barbara Comstock ..." (Glen Johnson, "Conservatives Say Massachusetts Governor Needs To Explain Record On Gay Rights," *The Associated Press*, 12/13/06)

Comstock Serves As Rep. Jerry Lewis' Spokeswoman For Investigation And Lewis Paid Her Firm Nearly \$20,000. "In the division of legal labor for Lewis, Comstock -- whose firm has received nearly \$20,000 for her work -- serves as the spokeswoman for questions related to the probe. The lead attorney from Gibson, Dunn and Crutcher is Robert Bonner, a former U.S. attorney from Los Angeles, the office leading the Lewis investigation." (Paul Kane, "Lewis' Legal Bills Soar Past \$800K," *Roll Call*, 10/31/06)

- **Federal Investigators Looking Into Lewis Securing Earmarks For Clients Of Lobbyist Friend While Accepting Their Campaign Contributions.** "Federal investigators are examining Lewis' association with lobbyists who have secured millions of dollars in congressional earmarks for their clients. Lobbyists and their clients have contributed heavily to Lewis' political war chests, records show. Lewis has denied any wrongdoing. But the investigation is taking a toll on his campaign treasury." (Richard Simon, "Legal Fees Are Drain On Lewis' War Chest," *Los Angeles Times*, 10/18/06)
- **Lewis Being Investigated For Steering Earmarks To Clients Of Former Rep. Bill Lowery's (R-CA) Lobbying Firm.** "All told, Lewis has spent fully two-thirds of the \$1.2 million raised by his campaign committee in the 2006 election cycle on legal bills related to the investigation into his relationship with ex-Rep. Bill Lowery (R-Calif.), a close friend who founded a now-defunct lobbying firm that specialized in obtaining earmarks from the Appropriations subcommittee on Defense while Lewis chaired that panel, as well as earning grants for local municipalities in and around Lewis' district." (Paul Kane, "Lewis' Legal Bills Soar Past \$800K," *Roll Call*, 10/31/06)
- **No Charges Have Been Filed, But In May 2006 FBI Issued Subpoenas Seeking Documents From Lobbying Firm Clients.** "Lewis faces scrutiny as part of a wide-ranging federal investigation into a Washington, D.C., lobbying firm and the use of congressional earmarks, special funding projects that lawmakers insert into legislation. In May, a federal grand jury subpoenaed documents from several Inland cities and counties about their decision to hire the lobbying firm formerly known as Copeland, Lowery, Jacquez, Denton & White and its relationship with Lewis. Lewis has not been accused of any wrongdoing, and no charges have been filed as part of the investigation." (Duane W. Gang, "Democrat Hints At Try For Rep. Lewis' Seat," *The [Riverside, CA] Press Enterprise*, 3/1/07)
- **In Mid-May 2006, FBI Examined Lewis' Financial Disclosure Statements.** "[T]he FBI has examined the financial disclosure statements of Lewis, his wife, one current staffer and one former staffer. But those subpoenas were issued in the spring and the financial records were examined in mid-May, pushing the investigation out of the spotlight in the months since." (Paul Kane, "Lewis' Legal Bills Soar Past \$800K," *Roll Call*, 10/31/06)

Barbara Comstock Represented Scooter Libby. "Comstock, a lobbyist at the Blank Rome Government Relations firm, represents indicted ex-veep Chief of Staff Scooter Libby ..." (Mary Ann Akers, "Heard On The Hill," *Roll Call*, 1/9/06)

- **Libby Convicted Of Multiple Felonies.** "I. Lewis Libby Jr., the former chief of staff to Vice President Dick Cheney, was convicted today of lying to a grand jury and to F.B.I. agents investigating the leak of the identity of a C.I.A. operative in the summer of 2003 amid a fierce public dispute over the war in Iraq. Mr. Libby, 56, who once wielded great authority at the top levels of government, is the highest-ranking White House official to be convicted of a felony since the Iran-Contra scandals of the 1980s." (Neil A. Lewis, "Libby Guilty Of Lying In C.I.A. Leak Case," *The New York Times*, 3/6/07)

Barbara Comstock Represented Former Rep. Tom DeLay. "Comstock, a lobbyist at the Blank Rome Government Relations firm, represents ... DeLay, who's already been indicted in Texas and is treading choppy waters in the Congressional bribery scandal." (Mary Ann Akers, "Heard On The Hill," *Roll Call*, 1/9/06)

- **DeLay Resigned Amid Federal Criminal Investigation And Indictment In Texas On Money Laundering Charges.** "The pending resignation of former House majority leader Tom DeLay (R-Tex.), once one of the most powerful lawmakers in Washington, comes amid a federal criminal investigation that already has reached into his inner circle of longtime advisers. DeLay faces a trial later this year on money-laundering charges in Texas that stems from an October 2005 indictment related to corporate contributions to state elections in 2001 and 2002. Since then, two former aides and one of his most prominent contributors have pleaded guilty in a separate federal probe to crimes including conspiracy; wire, tax and mail fraud; and corruption of public officials." (R. Jeffrey Smith, "Federal Probe Has Edged Closer To Texan," *The Washington Post*, 4/4/06)

BOSTON VIDEO ARCHIVE

VIDEO CURRENTLY AVAILABLE FOR USE

Taxes And Fees

Romney: "the only way you can have tax cuts is if people stop spending money" in waste. (Tape 9)

Romney: "There was about \$260 million in fees that we raised." (Very Bad Video, Tape 5).

Romney: Gas tax holiday "crazy" (Tape 5).

Social Issues

Romney, discussing GA pheasant hunting trip, says he's hunted "many times." (Tape 9)

Romney: "I have expressed support for assault weapons bill" and says his position is the "same as Kerry and Kennedy on this." (Tape 73)

Romney agrees with reporter that "same sex couples can be good parents." (Tape 2)

Romney "wouldn't take a position" on Schiavo. (Tape 51)

Romney "would include stem cell funding in the economic stimulus bill." (Tape 51)

Romney, post epiphany, says because of campaign pledge, there will be "moratorium" on abortion related issues with respect to Massachusetts law. (Tape 23)

Romney discusses how the Congress passed the stem cell bill the same as the one he proposed (Tape 23).

Romney on abortion, saying he will enforce pro choice laws of MA. (Tape 23).

Romney discusses MA's gay marriage amendment, saying he won't campaign for it and is not actively engaged or pushing the ballot initiative. (Tape 23).

Romney: "I support abortion in the case of rape and incest and the life of the mother." (Tape 25)

Romney: "My own view is that every hospital should provide to rape victims information about emergency contraceptives." (Tape 25)

Romney: "I believe every hospital should provide information about emergency contraceptives to victims of rape." (Tape 25)

Immigration

Romney talks about revisiting immigration policy, mentioning President Bush and guest workers without saying he supports or opposes, does not mention McCain. (Tape 9)

Romney: "those who are here contrary to the law should seek to establish legal residence, and if they do so, I'd be delighted to provide support." (Tape 32)

Flip Flops

Romney: You'll have to allow me the opportunity to change my view on that (Tape 13)

Energy And Climate Change

Romney says we may be contributing to global warming. (Pretty Bad Video, Tape 30)

Discusses his climate protection plan, which is “designed to reduce greenhouse gases (Tape 43).

Romney discusses American manufactured cars, saying its ok to buy cars with foreign nameplate. (Pretty Bad Video, Tape 30).

Says CAFÉ standards need to be raised

Romney: This bill makes progress on CO2 emissions. (Tape 18)

Romney said “we’d all vote for Canada” to secure energy for America. (Tape 13)

Romney: “All the benefits of the cap and trade program should be able to be realized.” (Tape 25)

Criticizes Other States

Houston and Florida and US looks the same with Wal Mart and big box stores. (Tape 45)

During a BRAC press conference, Romney mocks military bases in Wyoming (Tape 38)

Romney says, “Shame on us for letting Providence pass us” (referring to Worcester, MA dropping from the second largest city in New England to the third largest, Tape 38).

Praises Mass.

Don’t talk down Massachusetts (Tape 7)

Romney says: “I can’t imagine anything more fun than being the governor of the great commonwealth of MA.” (Very Bad Video, Tape 12)

Other

Romney: “Let’s not do something the U.N. said not to do.” (Tape 51)

After bill signing, Democrat goes to take picture with Romney. Romney goes, “I better not see this in your campaign literature.” Dem replies, “I remember a time when you wanted to be in pictures with me.” (Tape 2)

Makes a joke about putting old people in the greenhouse and watering them every day (Tape 23).

Makes a joke at press conference about asking about “his waterskiing ability, given [his] tan.” (Tape 43)

Defends traveling for politicians and senators. (Tape 18)

Q&A on presidential ambitions (Full – Tape 21)

Will not seek reelection press conference (Full – Tape 18)

VIDEO WAITING TO BE COPIED

Flip Flops

Multiple videos of attacking Kerry for flip flops.

Social Issues

Romney: “you’ll never find a statement anywhere that I support civil unions.” (Tape 97)

Romney: “I would rather have civil unions (than gay marriage).” (Tape 97)

Massachusetts Praise, Criticizing Other States

Scolds “polluters from the mid-western states.” (Tape 17)

Says MA will takeover RI, CT, and NH. (mult.)

Repeatedly cites the “Houstonization” of cities sprawling and people getting fat. (Tape 57)

Retells story that, just like hell, Arizona would be paradise with more water and good people. (Tape 60)

Romney mocks high taxes and rolling blackouts in CA. (Tape 75)

Taxes And Fees

Romney: “Pay me more taxes!” (Tape 17)

His fee increases were “aimed at business” and the state revenues increased “\$60 million from closing loopholes on business.” (Tape 67)

Romney: “We will certainly grow our spending.” (Tape 50)

Romney says he increased fees \$59 million. (Tape 60)

Romney: “our own assessment of fee increases in \$330 million dollars.” (Tape 75)

Romney: “anytime you raise taxes, fees, etc, no question it is hard on all working people.” (Tape 75)

Romney says, “Did we have to make cuts? Of course. Raise a few fees? Absolutely!” (Tape 94)

Romney: “total increases of \$16 million dollars.” (Tape 88)

Romney: “Closing loopholes will generate \$70 million for the commonwealth.” (Tape 88)

Abortion And Life Issues

Says his education plan is not abstinence only, but is abstinence plus sex ed, “abstinence also.” (Tape 10)

Affirmative Action

Says he is “committed and devoted to 7 executive orders” that established affirmative action in MA government. (Tape 80)

Campaign Finance Reform

Romney: McCain-Feingold created with good intent. (Tape 39)

Conservatives

Reporter: “Are you a right-wing ideologue?” Romney: “NO!” (Tape 66)

Romney: “My position and common cause are going to line up straight down the road.” (Tape 59)

Flip Flops

Rips Kerry for flip flopping on the issues. (Tape 63)

Mocks Kerry for flip flops, War on Terror, marrying rich women, and says he should stay in Massachusetts. (Tape 61)

At BC04 press conf. says people should support Bush because he's consistent, but Kerry flip flops. (Tape 78)

At event with Kennedy family, says Ted Kennedy Jr. “expected a conversion experience.” (Tape 62)

Gambling

Romney explains his proposal for “video lottery gaming” in MA. (Tape 66)

Gay Adoption/Marriage

Romney: “you’ll never find a statement anywhere that I support civil unions.” (Tape 97)

Romney: “I would rather have civil unions (than gay marriage).” (Tape 97)

Romney praises town clerks and Mayor Menino for issues same sex marriage certificates and says protesters are “pedaling hate.” (Tape 59)

Romney says he “ordered justices of the peace to marry gay couples.” (Tape 59)

Romney: “Gay marriage is legal in MA and im delighted to have [Bill Weld] back and celebrating that legal union.” (Tape 59)

Romney says he may attend some gay weddings, but is out of town for the first he was invited to. (Tape 59)

Romney discusses gay marriage and says he wants “civil union type benefits, which I prefer.” (Tape 77)

Health Care

Romney: “Health care plan does not have implications beyond Massachusetts” and he won’t push it. (Tape 39)

Immigration

Romney: “I’ve seen proposals out of Washington that said ‘if you come to America and go to college, why you’re in the front of the line to become a citizen.’ I think that’s a great idea.” (Tape 36)

Romney says illegal immigrants should not be allowed to get drivers licenses. (Tape 77)

Judicial Nominations

Romney: “Clinton or Bush would die to have my success rate on judicial nominees.” (Tape 36)

Massachusetts

Romney: “Not good to send an impression that denigrates the commonwealth.” (Tape 15)

Romney: “I love this place. I love Massachusetts.” (Tape 93)

Taxes And Fees

Romney: “Pay me more taxes!” (Tape 17)

Romney: “We’ll close loopholes for more revenue.” (Tape 67)

His fee increases were “aimed at business” and the state revenues increased “\$60 million from closing loopholes on business.” (Tape 67)

Romney explains his support for a tax on online software sales. (Tape 52)

Romney: “We will certainly grow our spending.” (Tape 50)

Romney: He has “no current plan to reduce excise taxes on cars.” (Tape 63)

Romney discusses closing tax loopholes. (Tape 52)

Romney says he's "open to local taxes." (Tape 66)

Romney: "the difference between drivers license fees and taxes are hard to determine." (Tape 60)

Romney says he increased fees \$59 million. (Tape 60)

Romney: "our own assessment of fee increases in \$330 million dollars." (Tape 75)

Romney says fees are not broad based, and that license fees are pretty close to being taxes so he didn't raise them. (Tape 75)

Romney doesn't know what question about blind fee increase is about. (Tape 75)

Romney: "anytime you raise taxes, fees, etc, no question it is hard on all working people." (Tape 75)

Romney says, "Did we have to make cuts? Of course. Raise a few fees? Absolutely!" (Tape 94)

Romney: "total increases of \$16 million dollars." (Tape 88)

Romney: "Closing loopholes will generate \$70 million for the commonwealth." (Tape 88)

Romney: "No question we have a large state government." (Tape 88)

Awkward Moments

Romney at youth basketball game and gym class with awkward sit-ups/warm-up routine. (Tape 67)

Romney begins to discuss "acute hair situation." (Meant Acute Care Situation) (Tape 55)

Romney says the Harlem Globetrotters have trouble making touchdowns. (Tape 62)

General

Criticizes Sen. Santorum for saying Boston was the reason for church molestation. (Tape 39)

At BC04 press conference says its part of the process for senators to campaign and defends Kerry. (Tape 78)

Romney: "I don't want people outside this room to hear that." (Tape 61)

Romney: "local governments are frequently the problem." (Tape 75)

Romney: "you don't get a lot of honesty from politicians." (Tape 75)

Romney mocks Kerry, saying he threw his "yarmulke into the ring." (Tape 68)

Advocates seat belt law as "a very personal matter" and tells story of neighbor who rolled car. (Tape 91)

Criticizing Other States And Cities

Scolds "polluters from the mid-western states." (Tape 17)

Comments that you can buy (make?) "BMW's for less than U.S. cars in Detroit." (Tape 17)

Announces "the takeover of Rhode Island." (Tape 17)

Repeatedly cites the "Houstonization" of cities sprawling and people getting fat. (Tape 57)

Retells story that, just like hell, Arizona would be paradise with more water and good people. (Tape 60)

Romney mocks high taxes and rolling blackouts in CA. (Tape 75)

Romney says he bet with Pataki on ALCS, winner gets CT. (Tape 75)

Romney said he and his buddies at Bain would “launch hostile takeover of NH.” (Tape 68)

Other Press Events

Health care bill signing (no sound)

Press conference where he declines to run for reelection.

Family/Personal

Romney: I “haven’t urged my own children to enlist.” In the military (Tape 36)

Romney, hailing a new construction project on cape cod: “by virtue of being elected governor, I got my pet peeve taken care of and a pet project done.” (Tape 3)

Romney: “I’m wary of anyone who parlays background, money, and hair to political success.” (Tape 78)

Romney: “I thought becoming rich and famous would make me happy. Boy was I right.” (Tape 78)