

Quarterly Economy Tracker



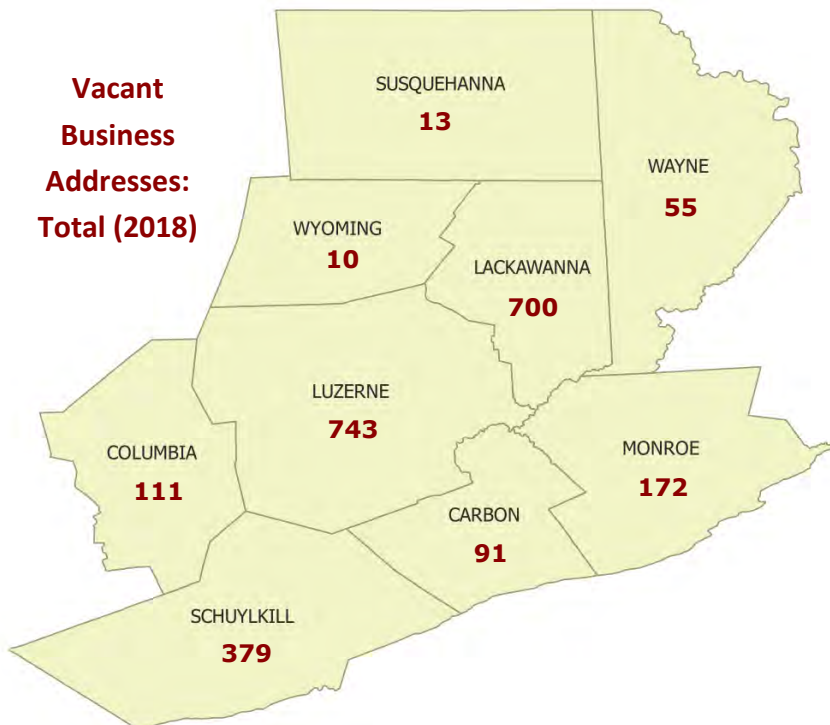
The Institute is a partnership among Geisinger Commonwealth School of Medicine, Johnson College, Keystone College, King's College, Lackawanna College, Luzerne County Community College, Marywood University, Misericordia University, Penn State Scranton, Penn State Wilkes-Barre, The Wright Center for Graduate Medical Education, University of Scranton, and Wilkes University

Business Vacancy: Challenges and Opportunities

By Andrew Chew, Senior Research & Policy Analyst

Vacant storefronts, offices, and industrial buildings are a reality in virtually every community. High rates of business vacancy suggest a soft economy and weak commercial real estate market, but having the right types of space available can provide opportunities for new entrepreneurship and make the region attractive to businesses looking to expand or relocate into the area.

Data on business address vacancy was obtained via a U.S. Department of Housing and Urban Development aggregation of U.S. Postal Service data on vacant addresses. The map to the right shows the total number of business addresses, by county, recorded as vacant in 2018. There were over 1,400 in the two-county region.



continued on page 3

The Economy Tracker is a quarterly publication of The Institute for Public Policy & Economic Development which seeks to explore economic data, trends, and issues related to our region's economy. Subscribe at www.institutepa.org to receive an electronic edition of the Tracker free of charge. In all its publications, The Institute uses the most current data available at the time of release.

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Labor Market at a Glance

In both counties, Pennsylvania, and the United States, unemployment rates fell in 2018 compared with the prior year.

Since then, all geographies have seen at least some months of further declines. For Lackawanna County, however, May 2019 marked the first month since 2016 in which the monthly unemployment rate was higher than the same month of the previous year. Nonetheless, the downward trend in the unemployment rate has continued—though signs like these may indicate that the unemployment rate regionally is approaching its floor. Regionally and nationally, the labor market is likely at or approaching full employment (the baseline unemployment rate below which higher rates of inflation and wage growth can be expected). The remaining regional unemployment can be largely expected to reflect frictional unemployment (the short-term unemployment during the time it takes a worker to find a new job after becoming unemployed).

These regional trends are explainable by small monthly fluctuations in the size of the labor force, which has declined by over one percent in the past decade, and steady or slight growth in total employment.

| Unemployment Rate (Not Seasonally Adjusted) | | | | |
|---|------------|---------|--------------|---------------|
| | Lackawanna | Luzerne | Pennsylvania | United States |
| 2009 | 8.2 | 9.0 | 8.0 | 9.3 |
| 2010 | 9.0 | 10.0 | 8.5 | 9.6 |
| 2011 | 8.8 | 9.6 | 7.9 | 8.9 |
| 2012 | 8.8 | 9.8 | 7.8 | 8.1 |
| 2013 | 8.3 | 9.4 | 7.4 | 7.4 |
| 2014 | 6.6 | 7.3 | 5.9 | 6.2 |
| 2015 | 5.8 | 6.4 | 5.3 | 5.3 |
| 2016 | 5.6 | 6.3 | 5.4 | 4.9 |
| 2017 | 5.1 | 5.9 | 4.9 | 4.4 |
| 2018 | 4.6 | 5.4 | 4.3 | 3.9 |
| April 2019 | 3.6 | 4.3 | 3.2 | 3.3 |
| May 2019 | 4.2 | 4.8 | 3.8 | 3.4 |
| June 2019 | 4.5 | 5.1 | 4.0 | 3.8 |

Source: US Bureau of Labor Statistics, Local Area Unemployment Statistics
June 2019 data is preliminary, except for national rate

| Labor Force & Employment | | | | |
|--------------------------|-------------------|------------|----------------|------------|
| | Lackawanna County | | Luzerne County | |
| | Labor Force | Employment | Labor Force | Employment |
| 2009 | 107,192 | 98,396 | 161,298 | 146,781 |
| 2010 | 106,992 | 97,407 | 159,767 | 143,867 |
| 2011 | 107,276 | 97,816 | 159,846 | 144,503 |
| 2012 | 107,642 | 98,123 | 160,859 | 145,107 |
| 2013 | 107,648 | 98,713 | 160,771 | 145,695 |
| 2014 | 106,658 | 99,644 | 158,948 | 147,310 |
| 2015 | 106,329 | 100,137 | 158,643 | 148,413 |
| 2016 | 106,753 | 100,722 | 158,706 | 148,726 |
| 2017 | 105,903 | 100,481 | 158,505 | 149,208 |
| 2018 | 105,330 | 100,502 | 157,784 | 149,255 |
| April 2019 | 104,685 | 100,876 | 156,453 | 149,791 |
| May 2019 | 105,243 | 100,823 | 157,354 | 149,735 |
| June 2019 | 105,694 | 100,988 | 157,997 | 149,996 |

Source: US Bureau of Labor Statistics, Local Area Unemployment Statistics
June 2019 data is preliminary

What's New at The Institute: Thank You!

By Teri Ooms, Executive Director &
Susan Magnotta, Director of Community Outreach

Indicators 2019 Wrap-Up

The Institute would like to thank all who attended the 2019 Regional Indicators event in May. This year's event brought a record attendance of 200 community, business, and institutional leaders who use The Institute's data and information to enhance their decision-making.

Thank You, President Leahy!

We would also like to extend a special thank you to Dr. Patrick Leahy, outgoing

president of Wilkes University and chair of The Institute's advisory board. Best wishes in your new role at Monmouth University!

Welcome, President Adams!

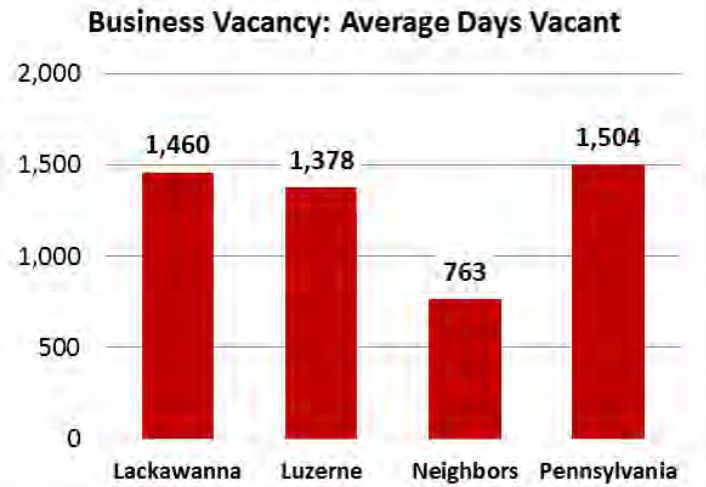
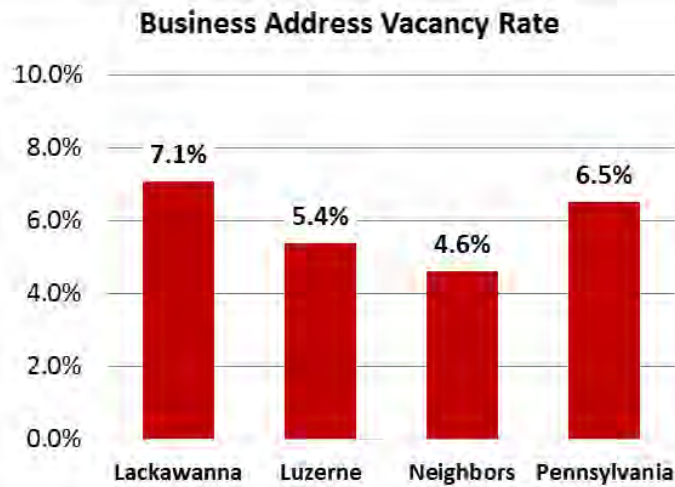
The Institute is pleased that Dr. Adams is serving as Wilkes' Interim President and Chair of the Advisory Board. Dr. Adams is a 40 year employee of Wilkes having served in a number of roles. Most recently, Dr. Adams served as the Vice President of Student Affairs, Accreditation

Liaison Officer for Middle States Commission on Higher Education and Chair of the University Mentoring Committee and Strategic Planning Committee.

Spring Poll Released

The Institute has released findings from its annual poll of college students who share their post-graduation plans. A preview of poll results can be found on page 10. Read more about The Institute's polls on www.institutepa.org ♦

Business Vacancy — continued from page 1



Lackawanna’s business vacancy rate is slightly higher than the statewide average of 6.5 percent, while Luzerne’s is slightly lower. The seven analyzed neighboring counties had a lower rate of vacancy—4.6 percent.

Both counties had an average length of vacancy slightly below that of the statewide average—1,460 and 1,378 days, respectively, compared to 1,504 days across the Commonwealth.

The chart below shows a more detailed breakdown of length of vacancy for business addresses. Lackawanna County has had a larger share of vacancy lasting 24 to 36 months, while Luzerne had a slightly larger share of long-term (36+ month) vacancy compared with the

other geographic areas analyzed.

In the more rural counties, the lower vacancy rate and lower average time of vacancy could be due to the smaller number of business addresses creating a tighter supply on the commercial real estate market.

The data analyzed here excludes addresses that have been vacant many years (such as brownfields) as well as buildings under construction that are not yet ready for occupancy. Several of the neighboring counties—particularly Monroe, Wyoming, Columbia, and Wayne—had above-average rates of such properties.

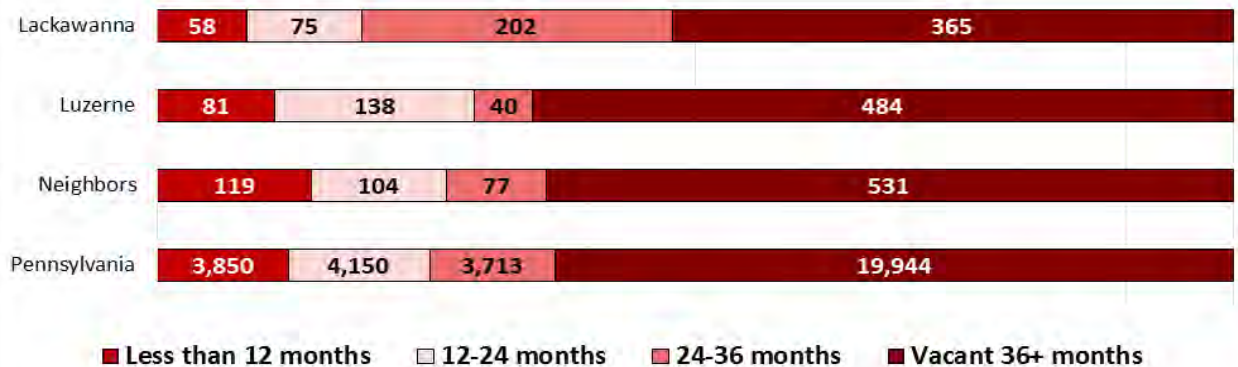
Vacancy at business addresses represents both a challenge and

opportunity for the region. However, persistent vacancy—including a large share of longer-term vacancy—shows that the type, size, location, or

“Both counties had an average length of vacancy slightly below that of the statewide average.”

condition of available business space may be mismatched with market demand. ♦

Vacancy by Length of Time



Source: US Department of Housing and Urban Development Aggregation of USPS Administrative Data

How Will Aging Affect Healthcare & Related Industries?

By Kara McGrane, Research Assistant

It is estimated that since January 1, 2011 approximately 10,000 people reach age 65 every day. The rate will continue until 2029. This generation will leave a large occupational gap as they retire, but they will also create a new demand for certain jobs as they increase use of healthcare, aging, and social assistance services.

By 2030, all baby boomers will be older than 65 years. At that time, 1 in every 5 U.S. residents will be retirement age. In 2050, the population aged 65 and up will amount to 83.7 million—double what it was in 2012 (43.1 million). People aged 65 and up currently comprise 19.6 percent of our region’s population. Our area’s median age, 42.9 years, is above the national and state averages (38.1 and 40.8 years, respectively). Due to the ongoing and upcoming aging of our population, the region’s economy must expect a generational shift. The region’s health care providers have already debuted new initiatives and facilities tailored to the unique needs of active older adults. Expansive services catering to the retiring population hint at a possible new demand and industry growth for health care and social

assistance.

The Health Care and Social Assistance Industry already employs the largest share of the regional population, with 47,456 employees. As a whole, it is projected to grow 1.2 percent every year for the next ten years. The industry’s workforce needs are significant; there is a total demand of 52,998 workers during the next decade, including those who retire, transition to different industries, and the 5,851 new jobs that will have been created. In 2029, employment in the industry is forecasted to be 53,307. Health care and social assistance average wages have also steadily increased since 2002—from \$44,626 (in 2019 dollars) to \$47,416 in the first quarter of 2019.

Several of the fastest growing occupations in health care and social assistance are directly related to the care and support of older adults. The top two occupations which see the highest total demand in the next ten years are Personal Care Aides and Home Health Aides. When considering

all the occupations in the region, personal care aides (1); nursing, psychiatric, and home health aides (2), registered nurses (3) and miscellaneous healthcare support occupations (5) are in the top five occupations with the highest amount of new growth in the next ten years. In the top ten, one can also find social workers (6), therapists (7), counselors (8), and miscellaneous community and social service specialists (10).

When analyzing demand for these occupations in relation to the supply of skilled workforce, there is an expected occupation gap in many health care industry occupation groups. Healthcare practitioners and technical occupations are expected to suffer the worst occupation gap (at 177 jobs). Healthcare support occupations will also be searching for people to fill 33 jobs. Conversely, there is a surplus of personal care and service skilled persons, equaling 22 jobs. Meeting the workforce needs of this changing industry is important for serving and caring for our aging population. ♦

Growing Health Care and Social Assistance Occupations

| | Currently employed | 2020 Projected Employment | Percent Increase | 2024 Projected Employment | Percent Increase | 2029 Projected Employment | Percent Increase |
|---|--------------------|---------------------------|------------------|---------------------------|------------------|---------------------------|------------------|
| Personal Care Aides | 5,594 | 6,591 | 18% | 10,740 | 92% | 16,046 | 187% |
| Registered Nurses | 5,396 | 5,720 | 6% | 7,040 | 31% | 8,726 | 62% |
| Nursing Assistants | 3,537 | 3,933 | 11% | 5,523 | 56% | 7,530 | 113% |
| Home Health Aides | 1,783 | 2,065 | 16% | 3,254 | 83% | 4,801 | 169% |
| Licensed Practical and Licensed Vocational Nurses | 1,665 | 1,787 | 7% | 2,286 | 37% | 2,922 | 76% |
| Medical Assistants | 1,138 | 1,288 | 13% | 1,905 | 67% | 2,686 | 136% |
| Office Clerks, General | 1,068 | 1,195 | 12% | 1,704 | 60% | 2,341 | 119% |
| Childcare Workers | 1,009 | 1,157 | 15% | 1,749 | 73% | 2,490 | 147% |
| Receptionists and Information Clerks | 860 | 984 | 14% | 1,486 | 73% | 2,118 | 146% |
| Medical Secretaries | 827 | 930 | 13% | 1,352 | 64% | 1,886 | 128% |

Source: Chmura Economics via JobsEQ

Cash Public Assistance Statistics

By Joseph Gallo, Research Assistant

In Pennsylvania, the General Assistance program, which provided cash aid to some households who do not qualify for the TANF (Temporary Aid to Needy Families), ended on July 31, 2019.

This program had relatively few recipients, with just under 12,000 statewide (of more than 140,000 recipients of all forms of cash assistance statewide). Across all counties in NEPA, there were most recently 624 recipients of cash assistance, which typically amounted to \$205 - \$316 per month. There were more recipients (70,000 statewide) prior to the first reduction in this program in 2012.

Lackawanna and Luzerne Counties together have over 7,000 households receiving some form of cash assistance (including GA, TANF, and several other smaller programs), per The Institute's most recent Regional Indicators Report.

The gross aggregate income reduction for the NEPA region as a result of the end of the General Assistance program ranges from \$1.54 million to \$2.37 million. ♦

Sources: PA Department of Human Services, US Census Bureau American Community Survey

146,108

Cash assistance recipients statewide (2017 ACS)

11,844

General assistance recipients prior to end of program

\$1.54—\$2.37 million

Aggregate income loss to NEPA region due to end of program.

Employee Turnover: What Does It Mean for Business?

By Courtney Scovish, Research Intern
and Joseph Gallo, Research Assistant

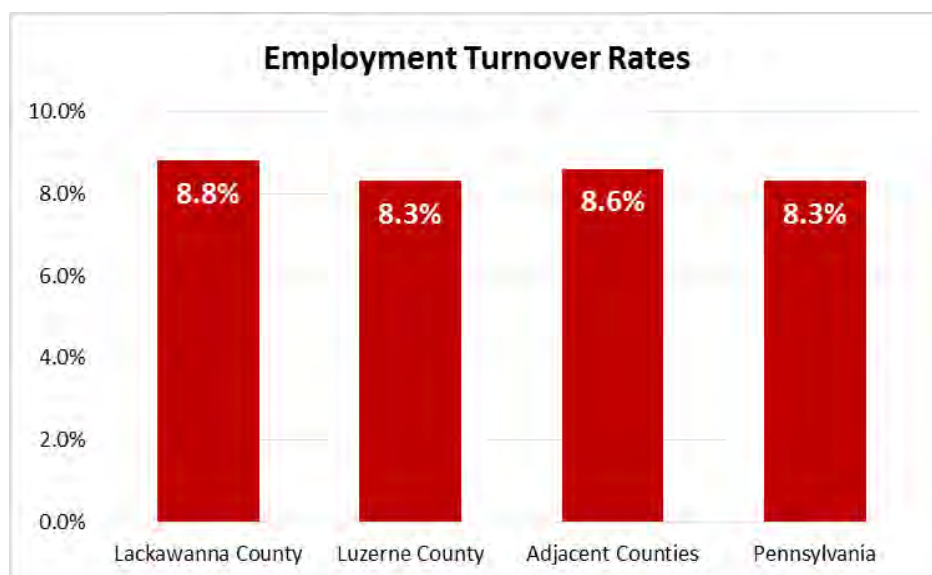
The rate of turnover is the rate at which employees leave and start jobs. One study by the Center for American Progress found that the cost to replace an employee is between 10 and 30 percent of the employee's annual salary. A benefit of employee engagement is that it leads to lower turnover, which can save companies a tremendous amount of time and money. According to a 2018 Gallup survey, only 34 percent of employees in the United States were engaged in their jobs. That survey also found that when a company has more engaged employees, it is likelier to be profitable and productive. Higher turnover rates can also be the result of strong employee confidence in the job market, as well as higher concentration of industries or occupations where turnover is common.

"Turnover is somewhat more prevalent in Lackawanna County."

Turnover is somewhat prevalent in Lackawanna County, which had an average quarterly turnover rate of 8.8 percent in 2016. Meanwhile, the average turnover rate was 8.3 percent in Luzerne County, 8.6 percent in the

counties adjacent to Lackawanna and Luzerne, and 8.3 percent in Pennsylvania as a whole. ♦

More data on workforce indicators can be found on pages 8-9.



Source: Chmura Economics via JobsEQ

Income & Earning Disparities in Northeast Pennsylvania

By Shawn Reilly, Research Intern and Andrew Chew, Senior Research & Policy Analyst

The median household incomes in Lackawanna and Luzerne Counties are low in comparison to median incomes at the state and federal levels. Lackawanna County’s median household income is \$48,380 and Luzerne County’s median household income is a little bit higher at \$51,332, according to 2017 data. The Pennsylvania median household income is \$59,195, which is slightly below the national level of \$60,336. The median household income shows the wealth of county, city, state, etc., as explained in The American Health Rankings. People who have a low household income are likelier than people with higher household incomes to encounter health issues. They also have a higher death rate.

Differences by Household Type

There is certainly a complex combination of factors that explain the region’s relatively low household income compared to statewide and national benchmarks. Differences in income among household types likely represent one factor. The median household income is considerably higher for families with children and married couple households

in both counties. In Lackawanna, the median family income is \$64,665 and the median married couple family income is \$77,564. The numbers are close in Luzerne as well, with the median family income at \$63,632 and the married couple’s median income at \$76,469.

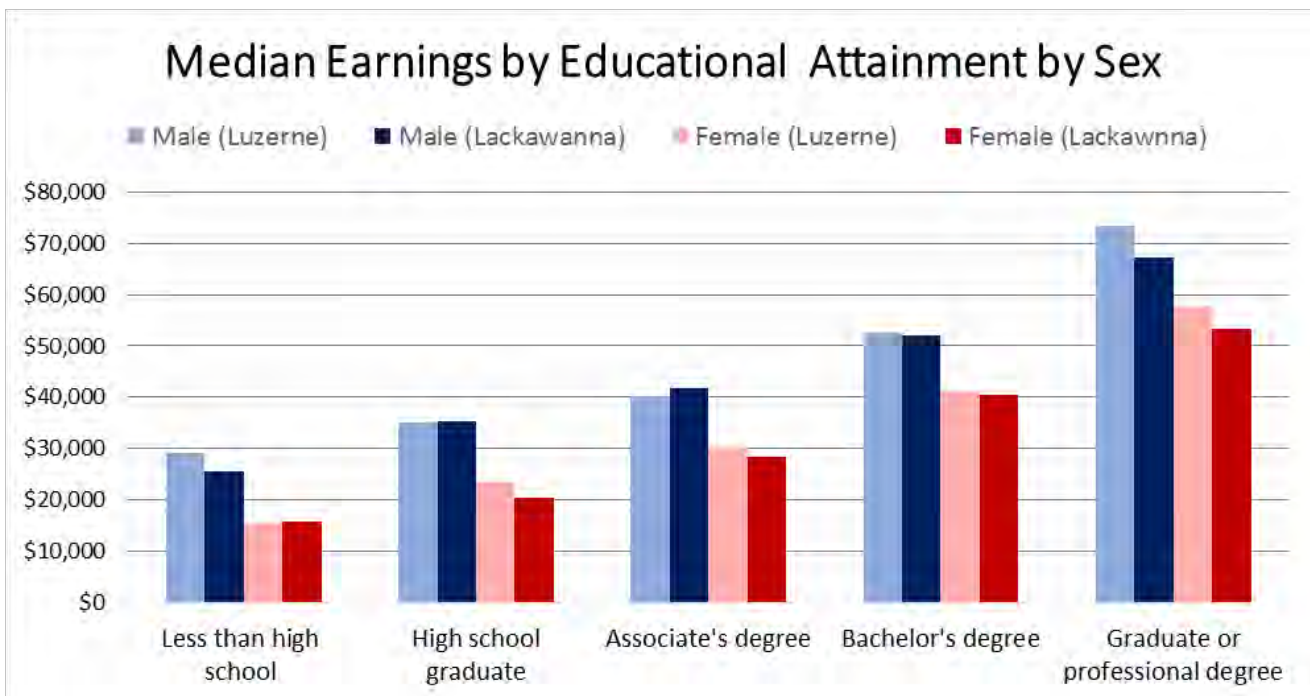
While the regional median incomes for married-couple families and families as a whole are about 90 percent of the nation medians, the regional median for nonfamily households (which include single adults living alone and households made up of individuals not related by blood, marriage, or adoption) is only 78 percent of the national median income for such households.

Gender Inequality in Earnings

Also, the median earnings for working women are much lower than those for men in Lackawanna and Luzerne Counties. In Lackawanna, women’s median earning is \$37,254, according to the 2013-2017 American Community Survey. That is more than \$9,000

dollars less than the median earnings for men (which is \$46,277. In Luzerne, women’s median earnings is \$36,694. That is \$8,000 less than the median earnings for men (\$44,862). However, the gender earnings gap shrinks as educational attainment increases. While women with just a high school diploma earn 37 percent less than male high school graduates in the two-county region, this shortfall drops to 28 percent among associate’s degree holders, 22 percent among bachelor’s degree holders, and 21 percent among those with an advanced degree. ♦

“The regional median income for families is about 90 percent of the nation median, while the regional median for nonfamily households is only 78 percent of the national median income for such households.”



Source: U.S. Census Bureau American Community Survey

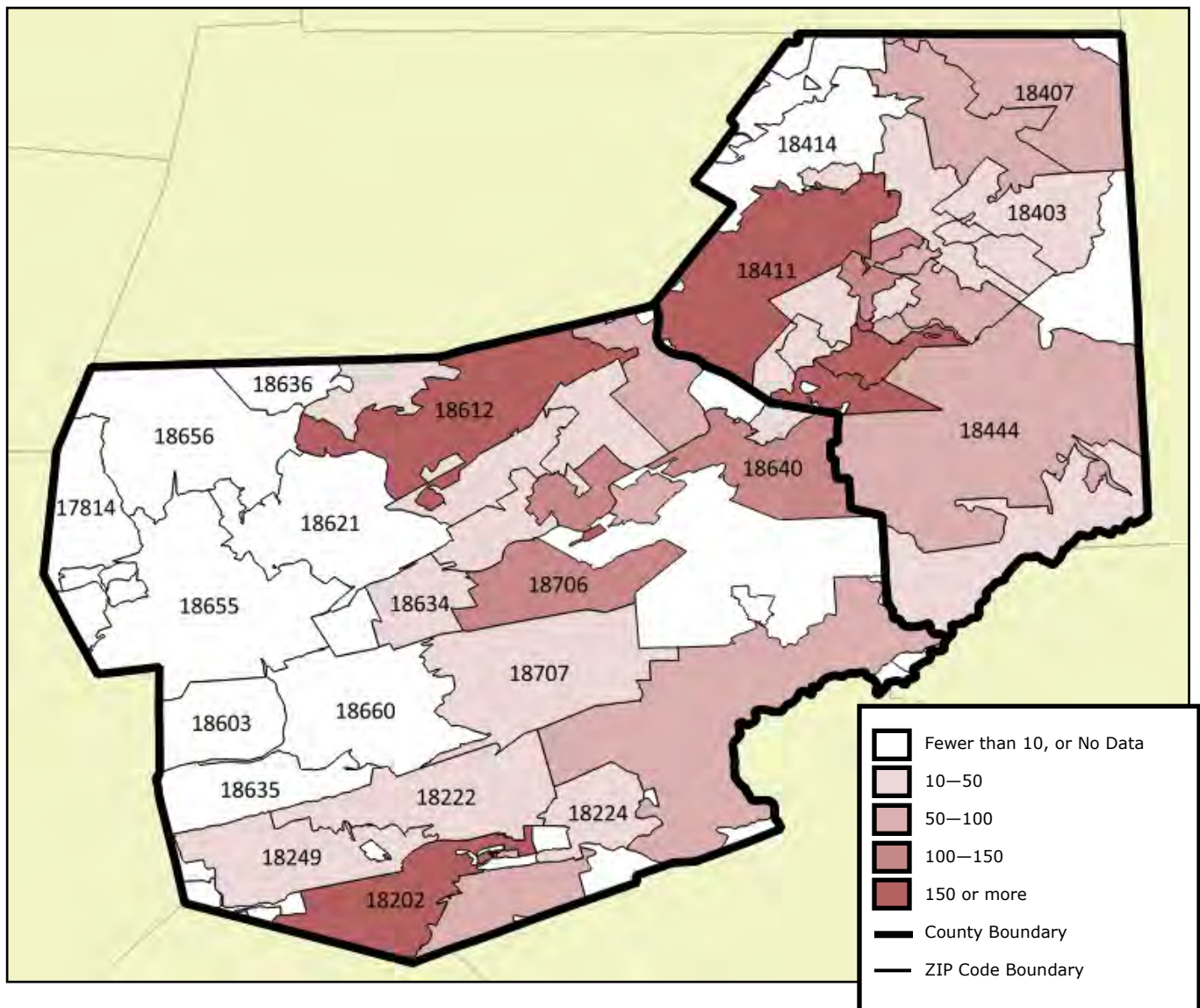
Cartography Corner

Employment in Entertainment and Tourism Industries

The region is home to many opportunities for recreation, entertainment, and arts and culture. These are important economic drivers, as demonstrated by data featured in the Spring 2019 edition of the Quarterly Economy Tracker. The map below shows ZIP code-level employment for selected entertainment and tourism industries— performing arts, spectator sports, museums, historical sites, amusement and gaming facilities, and hotels/lodging. Several other types of businesses which are tied to tourism to varying degrees, such as retail and food service businesses, are not included in these counts. Over 5,500 workers were employed in these industries across the region— a growth of nearly 12 percent in the past decade. Hotspots of tourism-related industries occur in several urban ZIP codes in Hazleton, Scranton, and Wilkes-Barre, as well as several more rural ZIP codes. This reflects the diversity of entertainment and recreational offerings present in the region.

Total Employment in Selected Entertainment & Tourism Industries

By ZIP Code for Lackawanna & Luzerne Counties



Source: Chmura Economics via JobsEQ

Data Spotlight

Lackawanna County Workforce Statistics

The tables below include the most recently available data on workforce indicators by industry group for Lackawanna County. The county's largest industry by employment, health care and social assistance, did not have the highest rate of hires and separations. The industry group that includes administrative, support, and waste management and remediation services had both the highest number of hires, separations, and turnover rate. The rate of turnover is the rate at which employees leave and start jobs.

For Lackawanna County, other industries with above average turnover rates included arts, entertainment, and recreation; accommodation and food service; agriculture, forestry, fishing and hunting; mining, quarrying, and oil and gas extraction; construction; and retail trade. A higher turnover rate can be a sign of less stability in the labor market in these industries, separations driven by higher employee confidence in being able to find a new job, short employee tenure, or a combination of these factors.

| Lackawanna County Workforce Indicators | | | | |
|---|---------------|----------------------|----------------------------|-------------------------|
| Industry | Employment | Avg. Quarterly Hires | Avg. Quarterly Separations | Avg. Quarterly Turnover |
| Agriculture, Forestry, Fishing and Hunting | 128 | 47 | 91 | 11.9% |
| Mining, Quarrying, and Oil and Gas Extraction | 50 | 3 | 10 | 11.3% |
| Utilities | 427 | 15 | 17 | 3.1% |
| Construction | 3,321 | 656 | 819 | 11.0% |
| Manufacturing | 9,324 | 950 | 1,001 | 6.3% |
| Wholesale Trade | 3,623 | 275 | 313 | 5.5% |
| Retail Trade | 12,056 | 1,986 | 2,271 | 10.3% |
| Transportation and Warehousing | 5,789 | 804 | 868 | 8.0% |
| Information | 1,394 | 180 | 212 | 6.4% |
| Finance and Insurance | 4,699 | 285 | 541 | 6.4% |
| Real Estate and Rental and Leasing | 789 | 98 | 140 | 9.8% |
| Professional, Scientific, and Technical Services | 4,045 | 365 | 404 | 6.3% |
| Management of Companies and Enterprises | 1,227 | 133 | 177 | 9.7% |
| Administrative, Support, Waste Management & Remediation | 6,311 | 2,947 | 3,309 | 19.1% |
| Educational Services | 8,557 | 519 | 1,044 | 5.5% |
| Health Care and Social Assistance | 19,438 | 1,893 | 2,644 | 8.6% |
| Arts, Entertainment, and Recreation | 1,242 | 412 | 591 | 18.2% |
| Accommodation and Food Services | 8,052 | 1,978 | 2,102 | 13.7% |
| Other Services (except Public Administration) | 3,172 | 350 | 429 | 7.4% |
| Public Administration | 3,355 | 183 | 288 | 4.2% |
| Total - All Industries | 96,999 | 14,035 | 17,385 | 8.8% |

Data Spotlight

Luzerne County Workforce Statistics

Luzerne County's largest industry, health care and social assistance, had only the third largest number of quarterly hires. Quarterly hiring was larger in administrative, support, and waste management and remediation services and retail trade. The administrative, support, and waste management and remediation industry had a much higher than average turnover rate, as was the case in Lackawanna County. The highest was in agriculture, forestry, fishing, and hunting, though that industry represents a very small share of Luzerne County's total employment. Arts, entertainment, and recreation and accommodation and food services also had turnover rates above 10 percent in Luzerne County.

In both counties, utilities and public administration had among the lowest turnover rates.

| Luzerne County Workforce Indicators | | | | |
|---|----------------|----------------------|----------------------------|-------------------------|
| Industry | Employment | Avg. Quarterly Hires | Avg. Quarterly Separations | Avg. Quarterly Turnover |
| Agriculture, Forestry, Fishing and Hunting | 28 | 7 | 9 | 38.3% |
| Mining, Quarrying, and Oil and Gas Extraction | 450 | 33 | 51 | 8.0% |
| Utilities | 2,304 | 84 | 211 | 2.8% |
| Construction | 4,826 | 776 | 938 | 9.1% |
| Manufacturing | 15,215 | 1,194 | 1,433 | 5.7% |
| Wholesale Trade | 5,837 | 438 | 497 | 5.6% |
| Retail Trade | 17,775 | 2,809 | 3,108 | 9.5% |
| Transportation and Warehousing | 13,693 | 2,176 | 2,114 | 8.8% |
| Information | 3,009 | 221 | 343 | 7.3% |
| Finance and Insurance | 5,228 | 330 | 368 | 5.5% |
| Real Estate and Rental and Leasing | 975 | 103 | 126 | 8.2% |
| Professional, Scientific, and Technical Services | 3,810 | 448 | 475 | 7.8% |
| Management of Companies and Enterprises | 1,722 | 124 | 125 | 4.9% |
| Administrative, Support, Waste Management & Remediation | 10,926 | 6,187 | 6,782 | 20.2% |
| Educational Services | 10,315 | 633 | 1,267 | 5.1% |
| Health Care and Social Assistance | 24,793 | 2,514 | 2,807 | 7.3% |
| Arts, Entertainment, and Recreation | 1,539 | 283 | 423 | 14.2% |
| Accommodation and Food Services | 11,779 | 2,493 | 2,755 | 12.4% |
| Other Services (except Public Administration) | 3,645 | 408 | 498 | 8.2% |
| Public Administration | 5,595 | 264 | 354 | 3.7% |
| Total - All Industries | 143,464 | 21,656 | 24,807 | 8.3% |

What's Next for NEPA Students?

By Christopher Ritter, Research Analyst and Andrew Chew, Senior Research & Policy Analyst

For the fifth consecutive year, The Institute conducted a poll of college students in Northeastern Pennsylvania. The poll covers post-graduation plans, attitudes about finding employment after graduation, and perceptions of Northeastern Pennsylvania as they influence decisions regarding where to live after completing undergraduate or graduate studies.

Several major findings are presented here. Additional findings and commentary from higher education leaders can be found on The Institute's website at www.institutepa.org.

Students may be less anxious about finding jobs now than they were in 2015. In each poll, students have been asked to indicate their levels of anxiety about finding jobs after graduation. Every year a majority of students have that they were either extremely or somewhat

anxious. This majority has declined slightly each year, however, with just under 51 percent selecting one of the top two levels of anxiety in 2019.

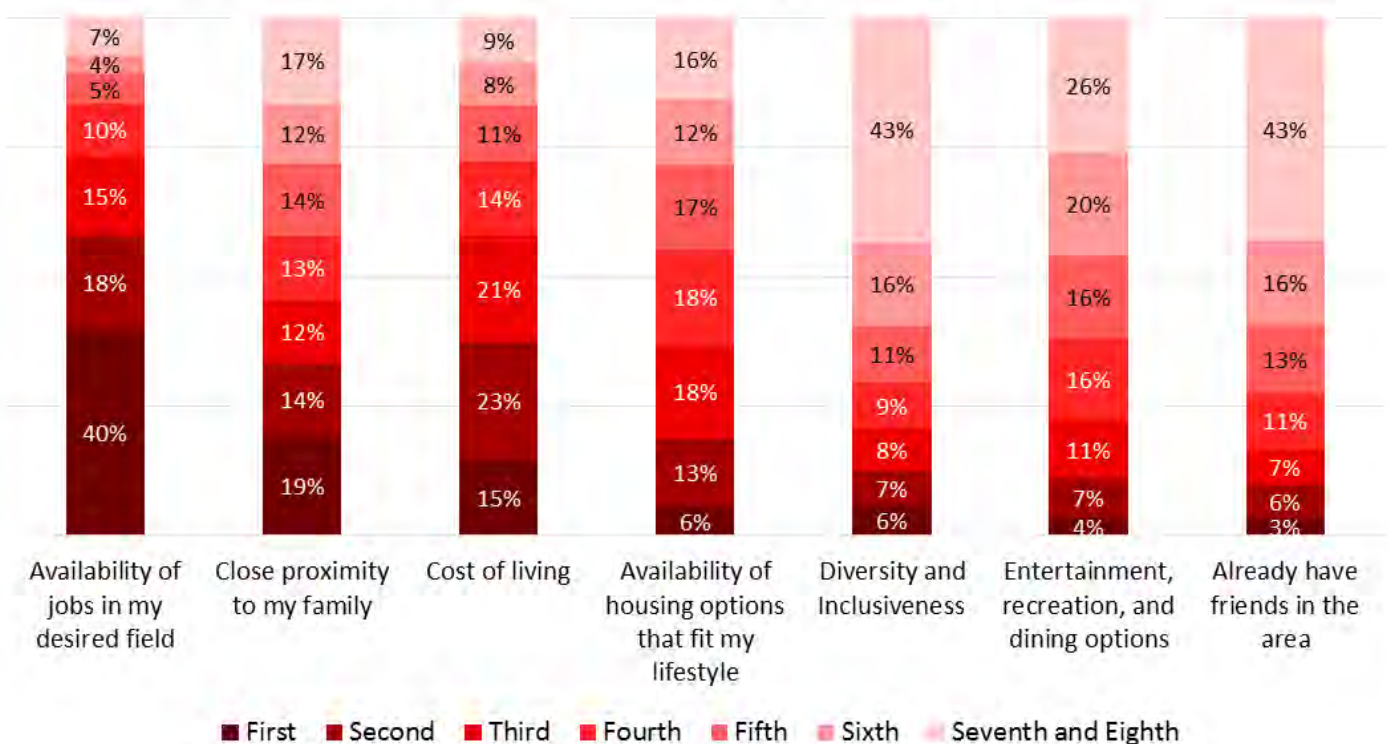
Students from NEPA are likely to stay in NEPA, which may not be the case for others. Students who intend to remain in the region after graduation are likelier than average to assign high value to a location's proximity to family and its suitability to raise a family, but are less likely to value the availability of housing options, close proximity of friends, and diversity or inclusiveness. Conversely, students who plan to depart the area after graduation are likelier than average to value the availability of housing options and both diversity and inclusiveness, while downplaying proximity to family, suitability for raising families, and the proximity to friends.

Jobs and Family Drive Work or Job Search Location after Graduation.

Participants were then asked to rank a list of characteristics and features they would consider when deciding where to locate or seek employment after graduation. Items were ranked from first (most important) to eighth (least important).

Economic and family concerns topped the list in importance. On average, the availability of jobs in students' desired fields was their most important consideration—with the highest weighted average, and the highest number of respondents ranking it first in priority. Students were less concerned about diversity and inclusiveness, entertainment, recreation, and dining options, and already having friends in the area. ♦

Rank of Considerations When Deciding Work/Job Search Location



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Please contact Susan Magnotta (magnotta@institutepea.org) for more information.

Circulation is over 1,000 self-subscribed individuals.



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The Institute Research Team:

Teri Ooms, Executive Director

Andrew Chew, Senior Research & Policy Analyst

Susan Magnotta, Director of Community Outreach

Christopher Ritter, Research Analyst

Joseph Gallo, Research Assistant

Kara McGrane, Research Assistant

Jill Avery-Stoss, Research, Data & Intern Coordinator

Offices in Wilkes-Barre and Scranton

Phone: 570.408.9850

Email: info@institutepa.org

www.institutepa.org

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