

# Quarterly Economy Tracker

The **INSTITUTE** for  
Public Policy & Economic Development

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

## Health Status and Economic Implications

By Megan Stachowiak, Research Analyst

The environments in which people live, learn, work, and play can impact the health of individuals and populations. Social and economic factors like housing, education, workplaces, the environment, recreational opportunities, and transportation influence health. Health disparities can result when differences in these conditions adversely impact different populations.

Health disparities can have an adverse economic impact on the region's economy by the effect they have on citizens' overall health and productivity. Poor health can limit students' academic performance and employees' attendance and ability to perform well at their jobs. This can result in increased health expenditures for individuals and employers, lower household earnings, and negatively impact the economic outlook of employers as well as the

overall region. A 2018 study by The Institute on the Social Determinants of Health further examined the factors affecting individual and population health outcomes, and found evidence that income, family composition,

education, and health insurance are the strongest predictors of health in Pennsylvania, and have at least the same degree of impact in Lackawanna and Luzerne Counties.

*continued on page 3*

### County Health Rankings 2019: Two County Overview

	Lackawanna County	Luzerne County
<b>Health Outcomes - County Rank (out of 67)</b>	<b>50</b>	<b>63</b>
Length of Life - County Rank (out of 67)	46	59
Quality of Life - County Rank (out of 67)	42	62
<b>Health Factors - County Rank (out of 67)</b>	<b>33</b>	<b>60</b>
Health Behaviors - County Rank (out of 67)	30	47
Social & Economic Factors - County Rank (out of 67)	44	63
Physical Environment - County Rank (out of 67)	36	45

Source: University of Wisconsin Population Health Institute. County Health Rankings 2019.

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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](http://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.

## 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. Lackawanna County's unemployment rate has since been near or slightly higher than the same month in the previous year. While Luzerne County has experienced some recent declines relative to the same month in the previous year, this indicates that the region's unemployment rate may have reached its floor for the current economic cycle. 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). In this data, which is not seasonally adjusted, the month-to-month rates have generally trended down, as holiday season hiring accelerates.

The total employment in both counties has shown a consistent upward trend in recent years, while the size of the labor force has fluctuated, indicating that labor force participation may be at a plateau in the short term.

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
July 2019	5.2	5.7	4.6	4.0
Aug 2019	5.2	5.9	4.5	3.8
Sept 2019	4.3	4.9	3.9	3.3

Source: US Bureau of Labor Statistics, Local Area Unemployment Statistics  
September 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
July 2019	106,102	100,551	158,437	149,357
Aug 2019	105,864	100,374	158,416	149,101
Sept 2019	105,250	100,753	157,437	149,644

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

## What's New at The Institute: Fall 2019

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

### Mini Indicators 2019

Based on the success of The Institute's regional indicators event, a special "Mini Indicators" event was held in collaboration with the Greater Wilkes-Barre Chamber of Commerce. It was held in October and brought critical data to a new audience. Thank you to the Chamber for this great partnership!

### The Institute Presents on Transportation at Conference

Andrew Chew, Senior Research & Policy Analyst, co-presented a session at the American Planning Association—Pennsylvania Chapter Conference in Reading, PA on October 21. Vivian Williams of the Scranton Area Foundation's NEPA Moves initiative and Kyle DeMaria of the Federal Reserve Bank of Philadelphia also participated.

The session focused on recent research

and collaboration around transportation equity in Northeast PA.

### Welcome, Megan!

Megan Stachowiak has joined The Institute as a research analyst. Megan offers a strong background in market research, with keen insight into competitive intelligence and strategic planning initiatives. We are thrilled to have her on board! ♦

**Health** — continued from page 1

One way to track the health status of a region and the associated social determinants of health is through the County Health Rankings report from the Robert Wood Johnson Foundation and the University of Wisconsin Population Health Institute. The County Health Rankings report identifies what factors influence how healthy residents are and how long they will live. The summary table provides a snapshot of the 2019 County Health Rankings for Luzerne and Lackawanna counties, and a comparison to the statewide average and top U.S. performers, representing the top 10 percent of counties in the country.

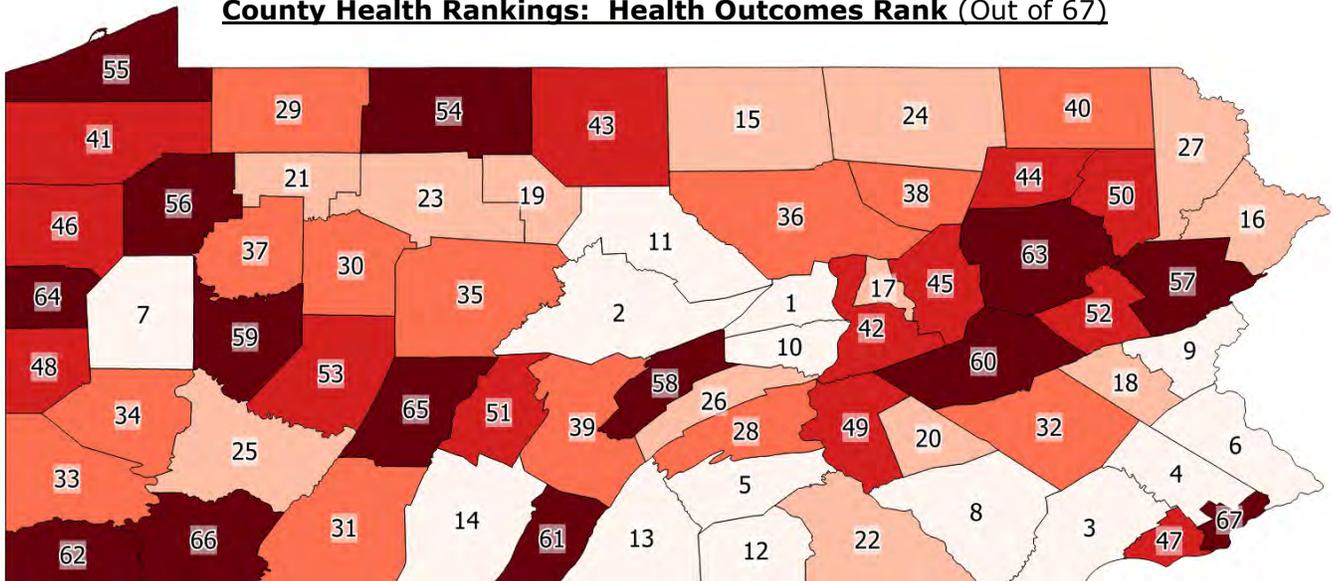
According to the 2019 County Health Rankings report, Luzerne County ranks 63rd and Lackawanna County 50th of Pennsylvania’s 67 counties in health outcomes. The health outcomes ranking is based on measures of how long people live and how healthy people feel. In both Lackawanna and Luzerne Counties, premature deaths (based on years of potential life lost before age 75) exceed the overall statewide trend. Within quality of life metrics, 17 percent of adults in Luzerne County reported poor or fair health status, compared to 15 percent

statewide.

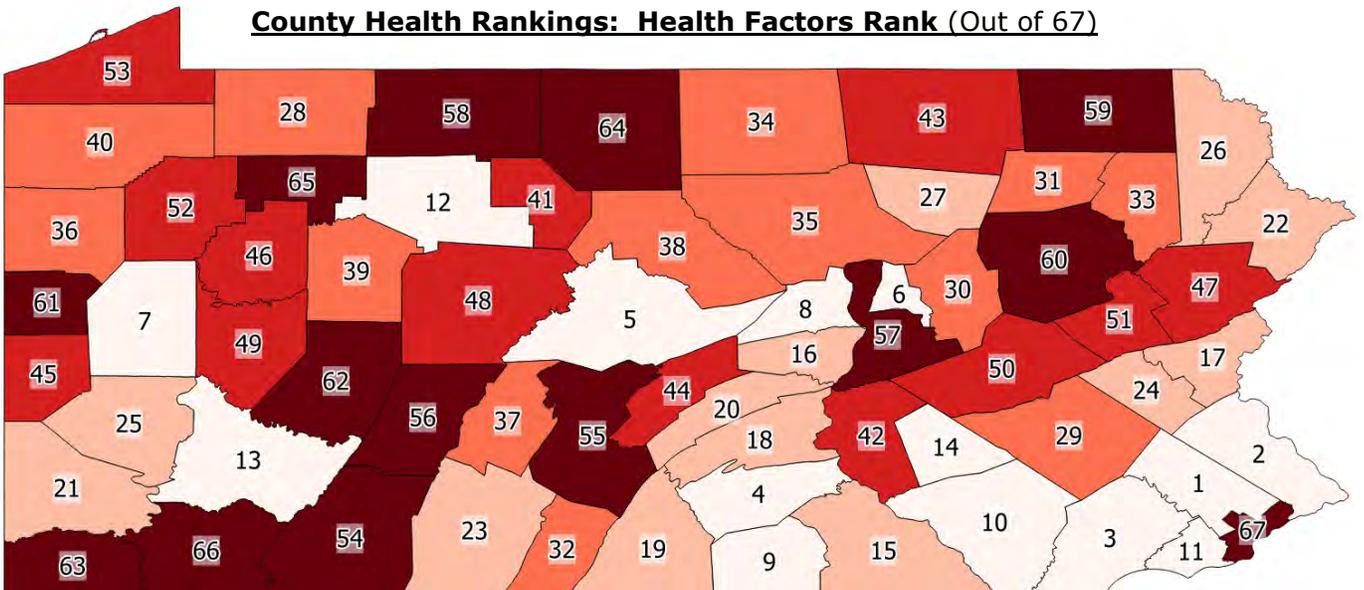
Health factors in the County Health Rankings report represent a broad range of factors that affect the future health of communities and impact how long and how well people live. Factors include healthy behaviors, clinical care, social and economic issues, and the physical environment. While most health behaviors in both counties are in line with statewide averages, Luzerne County has a higher rate of alcohol-

**continued on page 4**

**County Health Rankings: Health Outcomes Rank (Out of 67)**



**County Health Rankings: Health Factors Rank (Out of 67)**



**Health** — continued from page 3

impaired driving deaths.

In clinical care measures, both counties have an adequate supply of primary care physicians. There is some disparity in social and economic factors related to children, with more children under the age of 18 in poverty in both counties compared to the statewide average, and

a higher percentage of children who live in single-parent households.

The table below shows data for each component indicator that comprises the health factors and health outcomes rankings.

Understanding current health trends by collecting and tracking data about

health disparities and monitoring changes over time can help identify where action is needed to improve the conditions that keep people healthy, and in turn support positive economic growth. ♦

<b>County Health Rankings 2019</b>				
	<b>Lackawanna County</b>	<b>Luzerne County</b>	<b>Pennsylvania</b>	<b>Top U.S. Performers</b>
<b>Health Outcomes - County Rank (out of 67)</b>	<b>50</b>	<b>63</b>		
<b>Length of Life - County Rank (out of 67)</b>	<b>46</b>	<b>59</b>		
Premature death	8,400	8,900	7,500	5,400
<b>Quality of Life - County Rank (out of 67)</b>	<b>42</b>	<b>62</b>		
Poor or fair health	14%	17%	15%	12%
Poor physical health days	3.5	4	3.9	3
Poor mental health days	4	4.2	4.3	3.1
Low birthweight	8%	8%	8%	6%
<b>Health Factors - County Rank (out of 67)</b>	<b>33</b>	<b>60</b>		
<b>Health Behaviors - County Rank (out of 67)</b>	<b>30</b>	<b>47</b>		
Adult smoking	16%	17%	18%	14%
Adult obesity	28%	29%	30%	26%
Food environment index	8.1	8	8.2	8.7
Physical inactivity	24%	25%	22%	19%
Access to exercise opportunities	90%	81%	84%	91%
Excessive drinking	21%	20%	21%	13%
Alcohol-impaired driving deaths	31%	37%	28%	13%
Sexually transmitted infections	239.7	299.6	444.7	152.8
Teen births	20	24	20	14
<b>Clinical Care - County Rank (out of 67)</b>	<b>22</b>	<b>35</b>		
Uninsured	6%	6%	7%	6%
Primary care physicians	1,310:1	1,250:1	1,230:1	1,050:1
Dentists	1,330:1	1,520:1	1,460:1	1,260:1
Mental health providers	640:1	1,040:1	530:1	310:1
Preventable hospital stays	4,935	4,949	4,534	2,765
Mammography screening	43%	40%	44%	49%
Flu vaccinations	49%	46%	50%	52%
<b>Social &amp; Economic Factors - County Rank (out of 67)</b>	<b>44</b>	<b>63</b>		
High school graduation	88%	86%	87%	96%
Some college	63%	59%	64%	73%
Unemployment	5.1%	5.9%	4.9%	2.9%
Children in poverty	20%	25%	17%	11%
Income inequality	5	4.8	4.8	3.7
Children in single-parent households	37%	40%	34%	20%
Social associations	12.7	12.3	12.3	21.9
Violent crime	213	264	315	63
Injury deaths	81	84	81	57
<b>Physical Environment - County Rank (out of 67)</b>	<b>36</b>	<b>45</b>		
Air pollution - particulate matter	9.9	10.3	10.6	6.1
Drinking water violations	Yes	Yes		
Severe housing problems	16%	15%	15%	9%
Driving alone to work	81%	82%	76%	72%
Long commute - driving alone	22%	25%	36%	15%

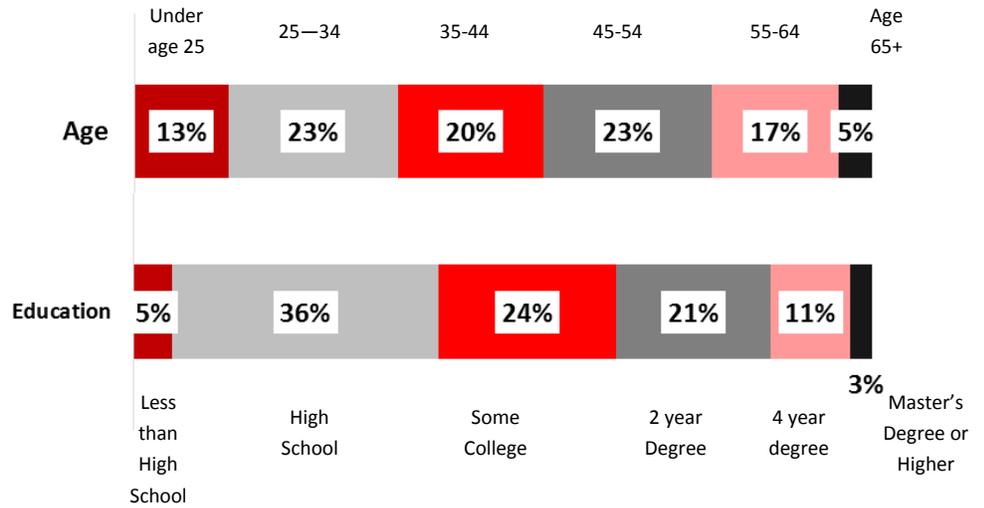
Source: University of Wisconsin Population Health Institute. County Health Rankings 2019.

# Who are the Healthcare Support Workforce?

By Andrew Chew, Senior Research & Policy Analyst

Healthcare support occupations represent a large and growing segment of the region's economy. These occupations, including home health aides, nursing aides, occupational and physical therapy assistants, and massage therapists, employ over 8,800 workers regionally.

This chart shows the educational and age composition of the current healthcare support workforce. These occupations provide economic opportunity to many without advanced educational credentials—over 40 percent have no education past high school. Additionally, nearly one in four will be at or past retirement age in the next decade, foreshadowing significant regional



Source: Chmura Economics via JobsEQ

# Regional Commuting Characteristics

By James Vitale, Research Intern and Andrew Chew, Senior Research & Policy Analyst

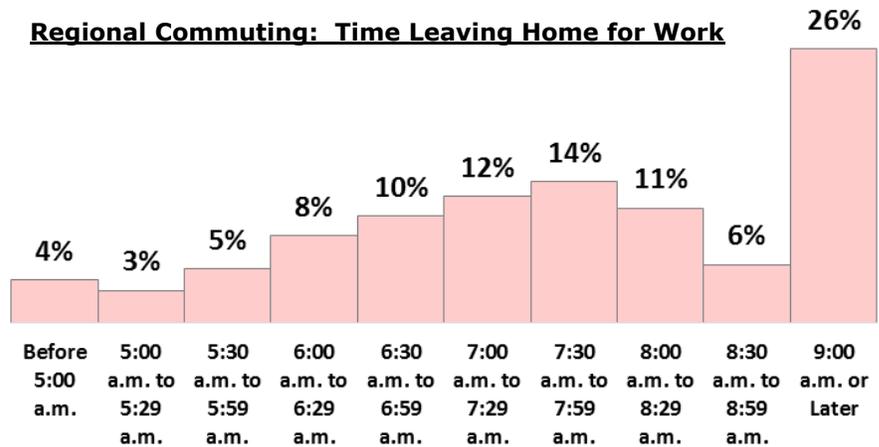
Monitoring commuting patterns is an important way of better understanding regional economic trends. In the two-county area, over 211,000 workers use a variety of different modes to commute to work, but driving alone is the most common—with 81 percent of regional workers doing so.

The majority of workers leave home for work between 6:00 a.m. and 9:00 a.m., although three in ten workers leave for work after 9:00 a.m. or before 5:00 a.m. Many employers in a variety of industries have adopted schedules that include second or third shift work, swing shifts, 10 or 12 hour shifts, or other non-traditional schedules.

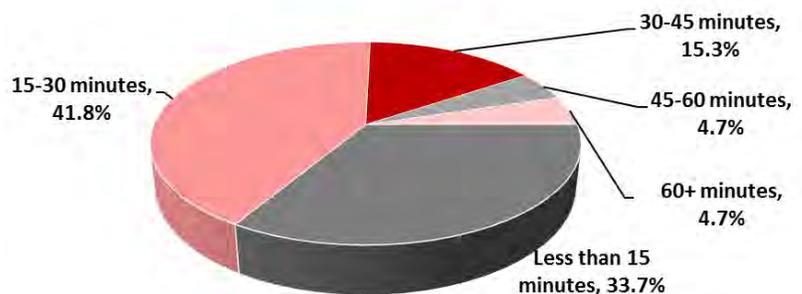
While the mean travel time for workers regionally is 21.6 minutes, one in four workers commutes 30 minutes or more each way.

Commuting characteristics are important for better understanding how regional transportation and land use issues intersect with employment. Lack of access to transportation can affect employment opportunities, especially

## Regional Commuting: Time Leaving Home for Work



## Regional Commuting: Average One-Way Commute Time



Source: 2017 American Community Survey 5-year Estimates

# Which Job Skills are in High Demand in Northeast PA?

By Andrew Chew, Senior Research & Policy Analyst

Our region’s labor market is characterized by low unemployment rates and many job vacancies in a variety of occupations and industries. Tight labor market conditions are projected to continue for at least the short term. In order for firms to meet their workforce needs, it is imperative that the workforce have the right skills that are in demand for the available openings.

Real-time job postings data was analyzed. Available data in Fall 2019 provided information on the most commonly cited skill requirements in job postings in the two-county region. It was broken into two broad categories—soft skills and hard skills.

### Soft Skills: Communication and Teamwork Are Critical

Among soft skills (and all skills), verbal and written communication were the most commonly mentioned in over 6,000 regional job postings. They were followed by *cooperative/team player* and *customer service*. Self-motivation, adaptability/flexibility, and organization were also mentioned in over 2,000 job postings each. Over 1,200 postings mentioned supervision or management skills.

### Hard Skills: Technology, Retail, and Physical Labor

Among hard skills, proficiency in Microsoft Excel and Microsoft Office were most frequently listed—in over 900 job posts each. The next most frequent were references to the ability to lift objects of various weights. Hard skills related to the retail industry such as sales, merchandising, and cash handling appeared frequently as well.

Due to the diversity in hard skills in demand, broader categories of skills were analyzed. Over 3,800 postings required office software or computing skills, 3,400 required physical or labor skills, 3,000 required sales or customer service skills, and over 2,900 required knowledge-based or academic skills such as teaching, healthcare, or education. Nearly 1,200 job postings had technical or trade skill requirements such as manufacturing, plumbing, and HVAC. The

wide array of in-demand skills shows need for a variety of workforce development and educational approaches to meet the region’s labor market requirements. ♦

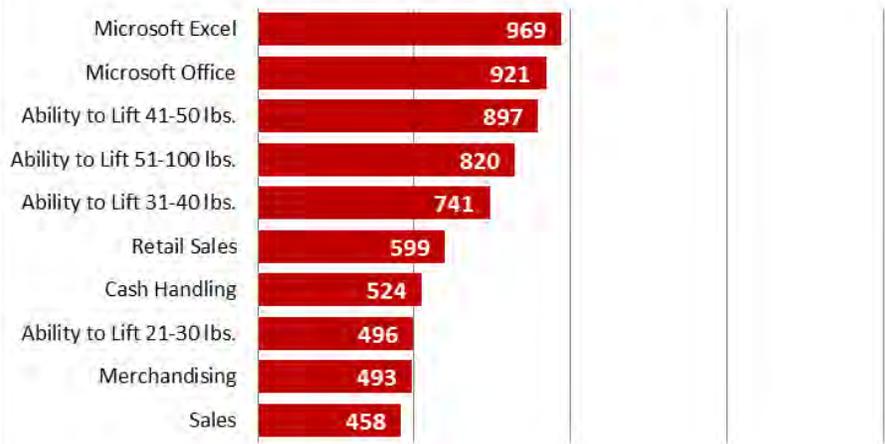
*Additional real-time job postings data is presented on pages 8 and 9.*

Hard Skill Category	Postings
Office Software/Basic Computing	3,832
Physical/Labor	3,440
Sales/Customer Service	3,009
Knowledge-Based	2,905
Technical & Trades	1,177
Health Care	957
Languages & Communication	873
Heavy Machinery	561
Food Service	463
General	152

### Regional Job Postings by Top 10 Soft Skills



### Regional Job Postings by Top 10 Hard Skills



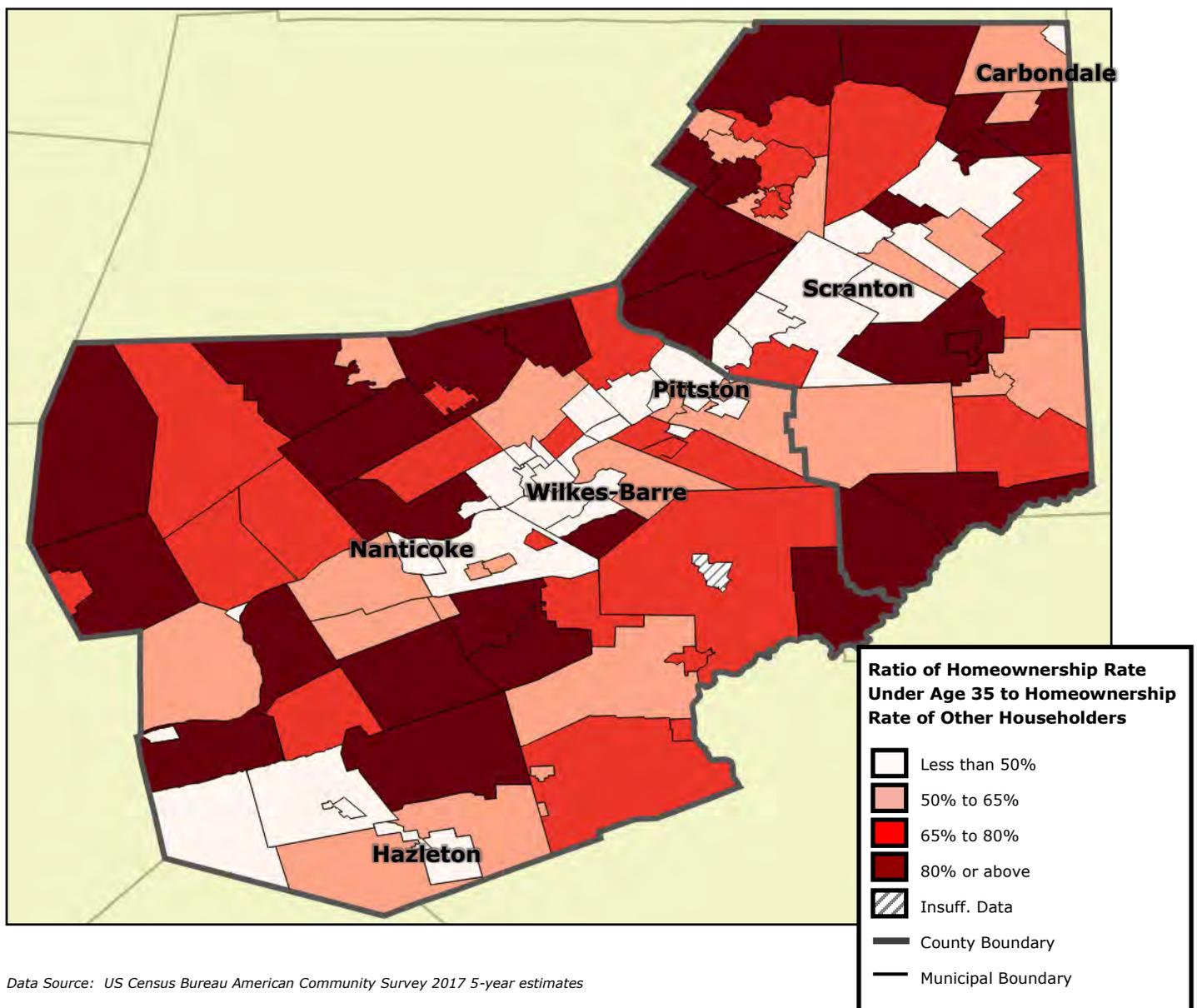
## Cartography Corner

### Millennial Homeownership Trends

A significant amount of nationally-focused commentary and analysis has observed the relatively low rates of homeownership among the Millennial generation, made up of adults aged approximately 23 to 38 years as of 2019. Data from the U.S. Census Bureau also shows relatively low rates of homeownership for younger householders in Northeastern Pennsylvania. There are an estimated 11,000+ young homeowners in the region, however, and differences between communities are apparent. The map below shows the homeownership rate of householders under age 35 (as of the 2017 ACS dataset) as a percentage of the homeownership rate of older householders. In the region's three largest cities, the homeownership rate of millennials is less than half of the rate of householders over age 35. However, there are numerous municipalities - particularly rural and suburban communities - with near parity between the homeownership rates of younger and older householders. To some degree, this likely represents self-selection; only younger householders who can afford to own homes comprise large shares of the communities where rental housing is limited.

### Homeownership Rate of Householders Under Age 35

As a percent of Homeownership Rate for Householders Age 35+  
By Municipality for Lackawanna & Luzerne Counties



Data Source: US Census Bureau American Community Survey 2017 5-year estimates

## Data Spotlight

### Jobs in Demand: Real-Time Job Postings

The table at left below shows the top job titles referenced in current job postings (as of Fall 2019). Some duplicates were removed from the list, though some titles with only slight differences were retained separately. The most frequent job title in the dataset was *shopper help*, driven by heavy recruiting from a company seeking independent contractors to perform on-demand shopping and delivery work through an online platform. It was followed by sales associates, servers, and customer service representatives. Occupations associated with the region's food service, retail, and warehouse industries are all represented in the top 25.

Wilkes-Barre was the most frequently listed location in job postings (1,933 listings), followed by Scranton (1,636). These totals only represent locations listed in postings, and may not align with municipal or other boundaries. Large numbers of postings also referenced Bloomsburg, Hazleton, Pittston, and Berwick.

The largest share of current job postings (over 4,600) have a stated requirement of a high school diploma or equivalent. By comparison, only about 2,000 posted jobs require a bachelor's degree or higher.

Real Time Job Postings by Job Title Regional Top 25	
Job Title	Postings
Shopper Help	53
Sales Associate	44
Server	41
Customer Service Representative	40
Warehouse Associate	39
Cook	37
Delivery Driver	35
Dishwasher	34
Bartender	33
Registered Nurse (RN)	33
Administrative Assistant	32
Maintenance Technician	32
Crew Member	31
Prep Cook	31
Maintenance Person	29
Assistant Manager	28
Department Manager	28
General Manager	27
Retail Sales Associate	27
Housekeeper	26
Food Service Clerk	24
Line Cook	24
Cashier	23
Forklift Operator	23
Material Handler	22

Real Time Job Postings by Location Regional Top 10	
Location	Postings
Wilkes Barre, Pennsylvania	1,933
Scranton, Pennsylvania	1,636
Bloomsburg, Pennsylvania	598
Hazleton, Pennsylvania	531
Pittston, Pennsylvania	409
Berwick, Pennsylvania	271
Kingston, Pennsylvania	193
Clarks Summit, Pennsylvania	172
Moosic, Pennsylvania	162
Hazle Township, Pennsylvania	133

Real Time Job Postings by Education Level	
Minimum Education Level	Postings
High school diploma or equivalent	4,634
Bachelor's degree	1,574
Associate's degree	475
Master's degree	282
Doctoral or professional degree	113

***"The largest share of current job postings require only a high school diploma or equivalent: over 4,600 jobs. By comparison, only about 2,000 posted jobs require a bachelor's degree or higher."***

## Data Spotlight

### Job Skills: Certifications & Credentials

The table below shows real time job posting data (as of Fall 2019) on the number of job postings by required certification. These differ from education or degree requirements but represent an important facet of workforce development. Over 500 regional postings require the applicant possess a driver's license. Several healthcare certifications (RN, CPR, BLS, ACLS) are also listed on many job postings. The region's growing healthcare occupations frequently demand specialized certifications, with and without accompanying postsecondary degrees. Commercial driver's licenses are needed frequently as well, with CDL-A classifications much more commonly listed than CDL-B.

Real Time Job Postings by Certification Regional Top 25	
Job Title	Postings
Driver's License	518
Registered Nurse (RN)	367
Certification in Cardiopulmonary Resuscitation (CPR)	309
Basic Life Support (BLS)	296
Advanced Cardiac Life Support Certification (ACLS)	147
Class A Commercial Driver's License (CDL-A)	139
Licensed Practical Nurse (LPN)	115
First Aid Certification	105
Pediatric Advanced Life Support (PALS)	98
Certified Nursing Assistant (CNA)	96
Commercial Driver's License (CDL)	88
Forklift Certified	29
HAZMAT	28
The American Registry of Radiologic Technologists (ARRT) Certification	26
Child Development Associate (CDA)	25
Medical Assistant Certification (MA)	22
Class B Commercial Driver's License (CDL-B)	18
Licensed Clinical Social Worker (LCSW)	18
Certified Pharmacy Technician (CPT)	17
Licensed Professional Counselor (LPC)	16
Secret Clearance	16
Certified Revenue Cycle Representative Program (CRCR)	15
Emergency Medical Technician (EMT)	15
Automotive Service Excellence (ASE) Certification	13
ServSafe Food Protection Manager Certification	13

***"The region's growing healthcare occupations frequently demand specialized certifications, with or without an accompanying postsecondary degree."***

# Industry Trends in Gender Earning Disparities

By Kara McGrane, Research Assistant

Data show that differences in earnings between men and women are apparent in all industries and in all geographies. On average, there is a smaller pay gap in the two-county region, where women's total earnings are 69.5 percent of men's earnings - compared with the state and national levels, 67.8 percent and 65.8 percent respectively. At the local level, the gap is smallest in the educational services industry. Women earn 85 percent of salaries earned by men, on average. The largest pay gap in the two-county area is in the arts, entertainment, and recreation industry (at 37.6 percent); it is also the severest in the state, at 49.6 percent.

In absolute dollars, the largest salary difference for all geographies is in the

finance and insurance industry. There is a gap of \$37,905 in Lackawanna and Luzerne Counties, \$65,221 in Pennsylvania, and \$88,985 throughout the country. The smallest salary difference is in the accommodation and food service industry, with an average gap of \$5,387. This is possibly due to lower hourly wages in that industry.

The wage gap is exacerbated by what is known as the 'opportunity gap,' or the gender gap that occurs when climbing a career ladder. In "The State of the Gender Pay Gap 2019," PayScale found that, on a national level, an equal amount of men and women start their careers in non-managerial positions. Mid-career, 47 percent of men are managers or higher, compared to only 40 percent of

women. The gap between these percentages grows by late career. Furthermore, eight percent of men hold executive level positions by late career, in contrast to three percent of women.

Across all geographies, women form the majority of the workforce in the health care and social assistance industry. They cover an average of 78 percent of all employment. Men comprise the majority of workers in extraction industries in the two-county area and the state; women only represent 7.4 and 10.7 percent, respectively. However, the pay disparities in these industries are lower locally than they are statewide. There appears to be little correlation between the share of an industry's workforce consisting of women and the gender pay gap in that industry. ♦

	Gender Earning Disparities, by Industry					
	Earning Differential in Dollars			Womens' earnings as a % of Men		
	2 County Region	PA	USA	2 County Region	PA	USA
Agriculture, Forestry, Fishing and Hunting	-\$10,412	-\$11,130	-\$10,562	74.8%	72.5%	72.3%
Mining, Quarrying, and Oil and Gas Extraction	-\$10,963	-\$18,549	No Data	80.2%	79.5%	No Data
Utilities	-\$25,822	-\$30,901	-\$25,718	70.7%	70.6%	74.0%
Construction	-\$20,450	-\$20,091	-\$16,758	66.4%	69.9%	72.8%
Manufacturing	-\$14,289	-\$16,134	No Data	73.7%	76.2%	No Data
Wholesale Trade	-\$14,588	-\$17,329	-\$21,878	78.6%	78.9%	72.9%
Retail Trade	-\$12,210	-\$13,253	-\$13,901	66.7%	65.7%	65.1%
Transportation and Warehousing	-\$10,761	-\$16,422	-\$16,762	75.2%	68.5%	70.6%
Information	-\$25,558	-\$33,798	-\$36,408	61.0%	64.5%	65.6%
Finance and Insurance	-\$37,905	-\$65,221	-\$88,985	58.0%	51.1%	43.3%
Real Estate and Rental and Leasing	-\$6,433	-\$20,303	-\$18,990	84.5%	70.5%	70.5%
Professional, Scientific, and Technical Services	-\$31,130	-\$41,590	-\$44,438	59.4%	62.9%	60.2%
Management of Companies and Enterprises	-\$18,740	-\$60,416	-\$54,915	73.4%	54.2%	55.7%
Administrative and Support and Waste Management and Remediation Services	-\$8,950	-\$11,003	-\$11,321	76.8%	74.8%	75.2%
Educational Services	-\$7,363	-\$15,967	No Data	85.0%	75.6%	No Data
Health Care and Social Assistance	-\$32,323	-\$33,074	-\$34,442	55.6%	56.8%	55.0%
Arts, Entertainment, and Recreation	-\$25,198	-\$22,462	-\$21,843	37.6%	49.6%	53.7%
Accommodation and Food Services	-\$5,565	-\$5,477	-\$5,118	73.6%	75.8%	79.1%
Other Services (except Public Administration)	-\$13,759	-\$15,299	-\$14,701	61.0%	63.6%	67.3%
Public Administration	-\$11,590	-\$15,080	No Data	77.9%	75.2%	No Data
Average	-\$17,200	-\$24,175	-\$27,296	69.5%	67.8%	65.8%

Data Source: Chmura Economics via JobsEQ

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