

Thank you for making Indicators 2019 a success!

We would like to extend a sincere and enthusiastic thanks to all who attended the 2019 Indicators Forum on May 9th. We could not have executed such a record-breaking event without the support of our partners, advisory board, task force teams, and generous sponsors. It is our pleasure to share our research with the community, and we hope it provokes thought and drives discussion on matters central to economic prosperity.

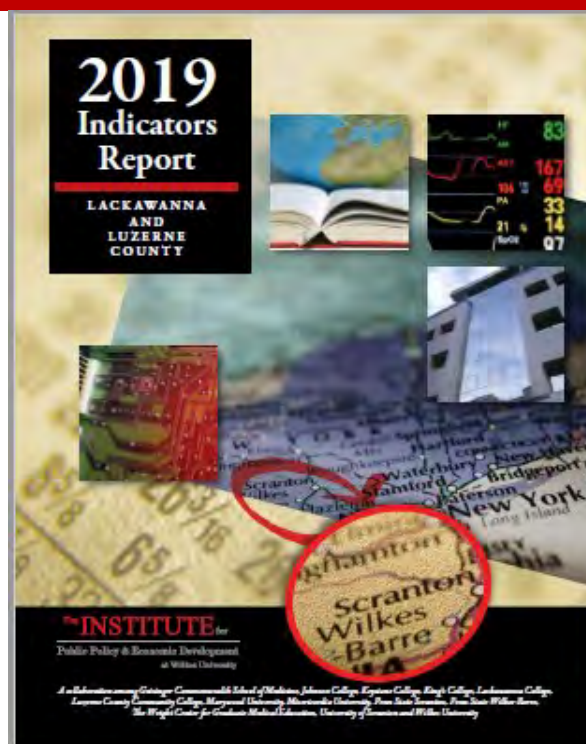
With deepest gratitude,

Teri Ooms, Executive Director

In this Issue:

- Indicators Review
- Special Thanks to Sponsors
- What to Expect in the Spring Edition of the QET
- Research in Action Highlights
- Overview of Current Institute Projects
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- Research Underwriters

[Access the 2019 Event Program Here!](#)



A collaboration 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

We greatly appreciate our research partners and 2019 event sponsors!

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Platinum: The Wright Center for Community Health

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Bronze: Community Bank, Peoples Bank & Trust, Penns Northeast, Quandel Construction

Individual: John Cognetti, Carl Witkowski

Research Partners

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All the best for Dr. Leahy!

The Institute's research team thanks Dr. Patrick Leahy for his extraordinary leadership over the years, and offers well wishes in his new journey at Monmouth University!



Quarterly Economic Tracker, Spring 2019 **The region's latest economic data and trends**

This issue of the QET covers:

- The Economic Impact of Tourism
- The Labor Market at a Glance
- Economic Resilience
- Math Skills & the Economy
- A Retail Industry Update
- Commuter Characteristics
- And More!

[**Access the QET Here**](#)



Platinum Sponsor

INVESTING *in* OUR REGION

\$81.8 MILLION  **18%**
from 2017

economic impact on the community in 2018*

325+ regional employees
(and we're hiring!)

738 physician graduates
*with many practicing
in Northeastern PA*

7 primary care practices
*located in Clarks Summit, Jermyrn, Scranton
and Wilkes-Barre with a new clinical-administrative
hub in Scranton coming soon*

TheWrightCenter.org

*Data calculated by The Institute for Public Policy & Economic Development



OUR MISSION
is to improve the
health and welfare
of our community
through inclusive
and responsive
health services and
the sustainable
renewal of
an inspired,
competent
workforce that is
privileged to serve.



Gold Sponsors



Silver Sponsor



Bronze Sponsors



Indicators 2019 Task Force Presentations



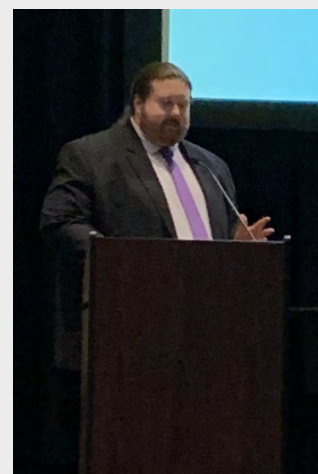
Health & Health Care: A study on food insecurity and food literacy in the region includes an examination of socioeconomic, cultural/linguistic, and knowledge/educational barriers to healthy food choices. The study also includes an analysis of regional food deserts and case studies of potential interventions.

Jobs, Economy & Economic Development: A 2019-2025 labor market assessment evaluates the size of the labor market and projected number of jobs due to both expansion and replacement demand in the region. This data is compared against regional degree completions in order to ascertain areas of potential workforce shortage.



Education & Workforce: Strategy development is based on the labor market assessment referenced above. It covers career awareness and exploration, education, and training for youth and incumbent workers. Furthermore, it encompasses career change, entrepreneurship, vocational rehabilitation, and other programs and services.

Planning, Land Use, Transportation & Infrastructure: A follow-up to the 2016 Transit Analysis further explores route-planning considerations. The study focuses on route-planning best practices that are currently in place in peer regions with higher public transit use. Frequency, hours of operation, and route design are compared with local services to identify potential areas of improvement.



Housing: A study of the region's aging housing stock includes a profile with detailed data on the age and conditions of housing, an explanation of the issue's importance and implications across a variety of areas of public policy interest—particularly health, social services, and the economy. Socioeconomic data is reviewed to show how homeowners' financial statuses are related to housing conditions. Best practices relating to aging housing stock are included as well.

How does research fuel action?



"We went to The Institute and we said we know what LERTA is, we just don't know enough about it. And so they took on a research project. They went across the Commonwealth, they looked at identifying about a dozen different municipalities of similar size to Scranton and came back to us with a **white paper** that showed us that in most cases the communities that would be similar to Scranton, such as Lancaster, Erie, Johnstown, these communities have adopted LERTA policies and said that all initiatives: commercial, industrial, or residential properties that came and were looking for improvements could adopt a LERTA policy right out of the gate...The Institute research did really two important things: One, **they informed us** as an organization so we now knew more about what LERTA was and how we might be able to apply this to the city of Scranton; but also it gave us the standing to be able to go to the taxing bodies in the city of Scranton, Scranton School District, Lackawanna County, and show them in real world—in real **hard numbers** and experience what other municipalities were doing across the Commonwealth."

Robert Durkin, President & CEO, Greater Scranton Chamber of Commerce

Many of our grantees have used data from The Institute but as a Foundation we also used their data extensively and most recently that was in the process of **developing our strategic initiatives**.... So once they provided us with that data they not only shared it with our foundation but at a community gathering of our stakeholders, which really gave us the opportunity to **interpret that data together** and to process and tease out what the implications were and that helped us get to the process of the specific goals in our initiatives...So I think I would just emphasize that for us it was really important to recognize that **the process didn't end when that data was provided to us**, it was so important to take the time and really interpret and **discuss the data** with the data gatherers who helped **provide a context** of what is being seen in broader areas but also the people that are living that data and really impacted by that data and that was really what helped us get to where we are now with our initiatives."

Christine Marcos, Program Officer, Moses Taylor Foundation

"We use it to put together **marketing plans** and **target specific sectors**...What also surprised us in strategic planning (was) to see an age gap where people leave the area and come back. So it helped us put together some plans to bring in some technology to hopefully grab those people who leave the area and eventually come back with their spouse to settle, because northeastern Pennsylvania is a great place to live...So it really helped give us some **direction** and validate what we're doing as an organization."

Clarence Baltrusaitis, President & CEO, NET Credit Union

"The work of The Institute really catalyzed the development of our psychiatry in residency program which is now in full boom just a few short years later with eight training and soon to be 12 resident physicians...They come and they **evaluate** many of our programs because frankly we take money from generous foundations like the All One, the Moses Taylor Foundation, and Weinberg. The external evaluation...really is much better than evaluating ourselves, which really seems a little bit more legitimate. We're really proud of The Institute's constant openness and I can tell you that after they recently just produced a beautiful **economic outcome report** for us that showed an almost \$82 million dollar annual economic impact on the region."

Linda Thomas-Hemak, MD, President & CEO, The Wright Center for Community Health

"About two and a half years ago, the Scranton Area Foundation and other partners had convened several individuals in the region to start to look at transportation as a potential critical driving force to quality of life. And one of the key partners at that table was The Institute because we knew that we heard nuances in the community at that time about how transportation was a barrier to access to employment, to health care, to arts and culture, but we really didn't have a specific handle on how exactly those barriers were impacting people in our community...But what The Institute did was initiate the Northeast Pennsylvania Transportation Study, which relied specifically on **focus group research** on the end users...was the direct context between transportation and workforce...And now we're working together to develop a specific pilots that will provide more equitable transportation to these employees and these pilots will be launching later in 2019 and 2020. And so if we did not have that partnership with The Institute throughout all of this, in addition to all the regional support from partners in this, I don't think we'd be able to say that we're moving forward as far and making a difference in equitable transportation so I think we can point directly on how these proprietary research studies have made such an impact in serving as a community leader."

Laura Ducceschi, President & CEO, Scranton Area Foundation



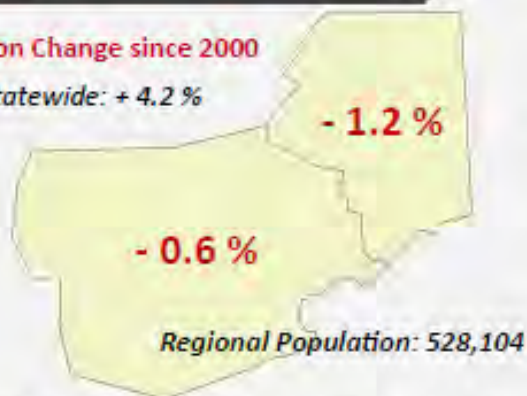
Lackawanna and Luzerne County Indicators

Regional Dashboard 2019

Population

Population Change since 2000

Statewide: + 4.2 %



As of 2017, about 1 in 5 residents was age 65 or older. The region has also grown more diverse, with increases in African-American, Asian, and Hispanic/Latino residents.



Housing

Regional Housing Statistics & Change from Prior Year

Homeowner Costs as a Percent of Median Income	30.9 %	↓ - 1%
Gross Rent as a Percent of Median Income	18.3 %	↑ + 1%
For Sale Inventory	2,331	↑ + 2%
Median List Price	\$135,540	↑ + 12%

Total Housing Units:

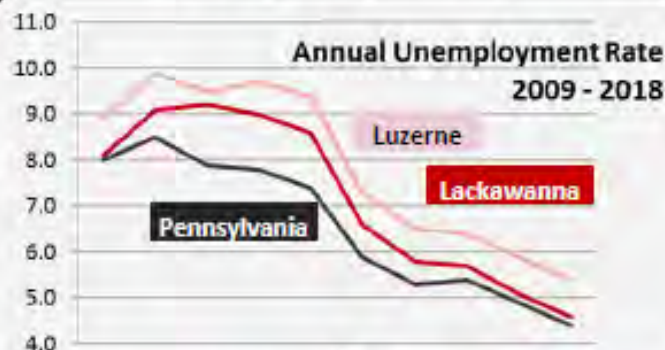
248,675



The Region's Economy

Labor Market

The region's labor market has improved in recent years. The unemployment rate has fallen by more than 4 points since 2012.



Innovation

STEM employment in both counties remains largely stable. STEM jobs are key components of several prominent industries in the regional economy.

Business & Industry

In 2017, there were 13,000 business establishments in the region, 5 percent fewer than a decade ago. However, the rate of job growth has accelerated. The regional GDP is growing, but at a slower rate than statewide.

Regional GDP

\$23.7B

2.2% real annual growth
(4.4% statewide)

Between 2013 and 2017, Lackawanna and Luzerne counties added over **6,800** jobs.



Income & Poverty

Regional poverty has improved and the rate of income growth has increased in the last several years.



Lackawanna and Luzerne County Indicators

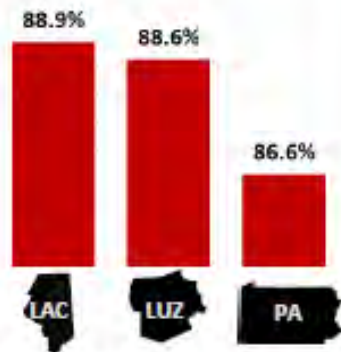
Turning Information into Insight

Education

Regionally, high school graduation rates have fluctuated but have generally been higher than Pennsylvania as a whole, as shown in the chart.

Higher education institutions awarded 8,639 degrees, certificates, and other awards in 2016-2017.

Regional HS Graduation Rate
2016-2017



Civic Engagement

Regional Nonprofits by Type

Total organizations, 2018: 2,072



Environment



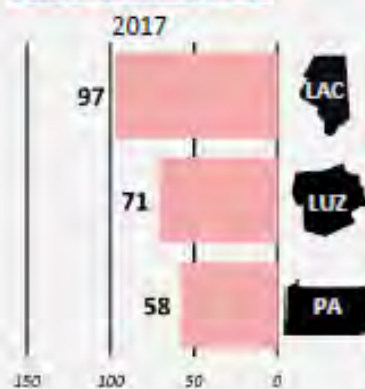
- Tonnage of recycled materials has increased across several major categories
- The region is home to 7% of Pennsylvania's abandoned mine land sites, 29% of its coal refuse sites, and 50% of 2017 abandoned mine land revitalization pilot projects.
- Air quality in the region is consistently in healthy ranges

Public Health & Safety

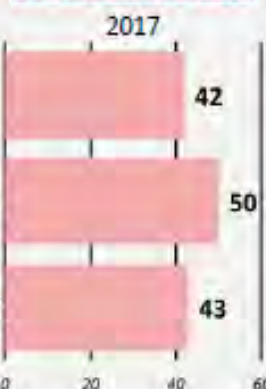
Behavioral Health

Behavioral health issues remain a significant challenge. The rate of tobacco smoking is above average: 25 percent of the adult population versus 18 percent statewide. Opioid abuse is also prolific, as shown below:

Opioid Prescribing Rate



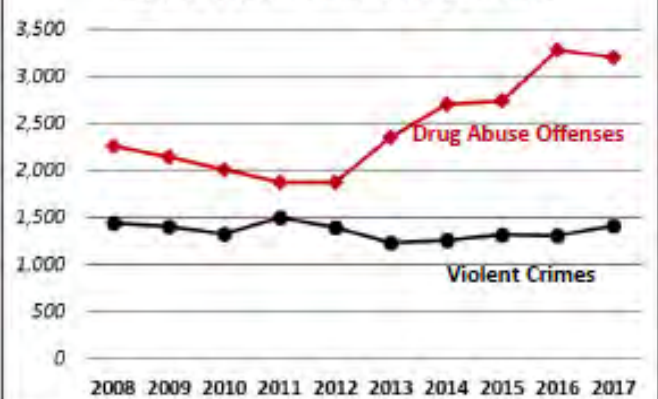
Overdose Death Rate



Criminal Justice

Violent crime rates have remained within a relatively narrow range, while drug abuse offenses reported to police grew significantly from 2012 to 2016.

Regional Violent Crime & Drug Offenses



Interested in learning more about our work?

Read about some of our latest projects...



Pittston YMCA Market Study

There's always room for growth—even for organizations with proven value and staying power. The Pittston YMCA leadership is aware of this fact, which is why a market study is underway. Awareness and needs assessment surveys distributed to current and former members, along with demographic and competitive analysis, will help determine the best mix of programs, services, and structure for the organization to thrive in the community.

Moses Taylor Foundation Census Education

Appropriate Census counts facilitate not only sufficient congressional representation, but also adequate funding for education, housing, infrastructure, social and health services, and more. That's why The Institute is assisting the Moses Taylor Foundation in an effort to educate the public about the Census and subsequently enhance participation. Information in multiple languages and reading levels will be distributed throughout the community via digital and hard copy over the next year.



Northeast Sight Services Needs Assessment

A comprehensive needs assessment will help Northeast Sight Services better assist people with low vision. The Institute is deploying surveys and conducting interviews with clients as well as social service and medical professionals. Once the qualitative and quantitative data is gathered, the research team will develop a set of strategic recommendations for expanded services through the organization.

United Way of Wyoming Valley Home Visitor Market Study

By examining existing services and measuring the demand for home visiting health and social care throughout Wyoming Valley, the Institute will produce a statistical report that outlines an effective approach to meeting community need. This effort will help ensure that collaboration among regional providers satisfies service and volume requirements.



Wilkes University Housing Market Studies

Wilkes University is on a mission to better serve students while attracting and retaining more talent and potential in the region. The Institute supports these efforts through a needs assessment and market study on student housing.

DIRECT EFFECT

Innovation Challenge

The Direct Effect Challenge

The first-ever Direct Effect Innovation Challenge was held on April 6th. The Institute assisted Wilkes-Barre Connect in its partnership with the United States Postal Service and Maga Design, Inc. to challenge students throughout the region. The students were asked to create fresh and exciting direct mail marketing solutions for two community organizations—Visit Luzerne County and Penn's Northeast, Inc. After presentations on direct mail as part of integrated marketing strategies and organizational needs, students split into groups and got to work under the guidance of some of the community's top designers. Not only were participants given incredible networking opportunities and resume-builders, their winning designs were selected for real-world marketing purposes! [Read more here!](#)

Equitable Transportation



On April 18th, The Institute's Senior Research & Policy Analyst, Andrew Chew traveled to the Reading Area Community College and spoke to a group of community stakeholders regarding the concept of transportation equity and The Institute's recent study commissioned by the Federal Reserve Bank of Philadelphia. The group was [convened by Berks Alliance](#). Andrew discussed The Institute's 2017 Northeast PA Equitable Transportation study, as well as subsequent work surveying employers and employees to learn more about the ways transportation (or lack thereof) impacts hiring and job sustainability in the region on behalf of NEPA Moves, a equitable transportation initiative through the Scranton Area Community Foundation. He was joined by presenters from the Federal Reserve Bank of Philadelphia. The speaking engagement concluded with a panel discus-

Client Solutions

Market & Feasibility Studies

Indicators- Indexes

Community Needs Assessments

Housing Studies

Economic Development Strategies

Economic and Tax Impact Studies

Survey Research

Industry Studies

Workforce Studies

Education Studies

Policy Analysis

Site Selection Research

Economic and Demographic Profiles

Grant and Program Evaluation Support

Research Validation and Peer Review

Tourism Strategic Plans

Comprehensive Plans

Asset Maps

The Institute in the News!

The economic impact analysis completed on behalf of the Appalachian Regional Commission was highlighted in the Winter newsletter as well as the Institute Insights publication. Word of the report has since spread even further!

Not only was it discussed in [Katie Byrne's story for Fox56](#), it made its way to the [ARC's national newsletter](#)!

If you aren't yet familiar with Economic Impacts and Effects of Coal Mining in Northeast Pennsylvania, [Read the report here](#).

Institute Participates in the Luzerne Foundation Annual Non-Profit Forum and

Wilkes-Barre Chamber's Young Professional Conference

Susan Magnotta, The Institute's Director of Community Outreach, has had a busy spring! First she participated in **The Luzerne Foundation's 6th Annual Non-Profit Forum**. It took place March 20 and 21 at the Holiday Inn, Wilkes-Barre - East Mountain. Among an array of non-profit leaders, Susan took five minutes to pitch The Institute. Several organizations were awarded funding upon culmination of the event. The forum offered not only an excellent learning opportunity, but an exciting means of connecting with community frontrunners.

Then, Susan participated in the Young **Professionals Conference**, which took place at the Wilkes-Barre THINK Center on March 28. It was the first annual conference of its kind, hosted by the United Way of Wyoming Valley and The Greater Wilkes-Barre Chamber. Susan was delighted to discuss the history and work of The Institute, as well as the importance of data. It was a riveting day of learning and relationship-building with the future leaders of Northeast Pennsylvania! The research team is now eagerly awaiting all the summer has in store!

Are You Interested in a Partnership?

Do you feel a personal connection to the culturally-rich northeast? Would you like to further invest in the region? If so, we invite you to join our growing list of generous community of supporters. Your underwriting will help the Institute provide our community with data and research that promotes informed decision-making and leads to greater economic vitality for the area.

Your partnership will contribute to:

Task Force Research

Indicators Report

Quarterly Economy Tracker

Regional College Student Poll

Regional College Internship Program

Special Community Based Research Projects

Please contact Susan Magnotta at magnotta@institutepa.org to discuss the possibilities!

Community-Based Research

Access the latest regional research on the Institute's website. www.institutepa.org

Regional Indicators Data & Research

Indicators data tracks the region's progress over time. They include economy, healthcare, environment, education and infrastructure measures. <https://institutepa.org/perch/resources/indicators18.pdf>

Task Force Research

Recent and archived research studies identify and address the region's challenges. This research is a driving force behind many important economic development and community revitalization initiatives, which produce positive outcomes for our area.
<https://institutepa.org/indicators.php>

Quarterly Economic Tracker

This quarterly electronic publication explores the region's economic and business trends.
<https://institutepa.org/economy-tracker.php>

Polling Program

Better understand the student perceptions of the region, post graduation plans, public policy views, and civic engagement of our local college students and future leaders.
<https://institutepa.org/polling-program.php>

Who We Are

The Institute is dedicated to empowering business and community leaders with researched-driven strategies for informed decision-making.

We conduct community-based, empirical research to identify the opportunities and challenges unique to our region, and offer innovative solutions for the problems facing our communities. **This research is funded by generous academic partners and sponsors who share our vision for a strong regional economy and vibrant communities.**

Thank you to our 2019 Research Underwriters!

The Institute would like to sincerely thank our generous stakeholders who share our vision for a strong regional economy and healthy communities. Your support makes our work possible!

Signature Underwriters

Andrew J. Sordoni Foundation
Luzerne County
PPL Electric Utilities
Sordoni Family Foundation

Contributing Underwriters

Borton-Lawson
Commonwealth Health Systems
Geisinger Health System
Mohegan Sun Pocono

Supporting Underwriters

Berkshire Asset Management
BlackOut Design
Classic Properties
Greater Hazleton CANDO
Highmark Blue Cross Blue Shield
Navient
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Penn State Scranton
Penn State Wilkes-Barre
The Wright Center for Graduate Medical Education
University of Scranton
Wilkes University

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Matthew Sordoni — Sordoni Construction

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