

# ECONOMIC SCORECARD

# 2018

MONROE COUNTY, PENNSYLVANIA



**A MESSAGE FROM  
MARCIA G. WELSH, PH.D., PRESIDENT**



East Stroudsburg University (ESU) is proud to share the fifth annual *Monroe County Economic Scorecard*, featuring five year trends across six economic indicators (Employment, Earnings, Business Climate, Healthcare, Housing, and Education) for Monroe, Carbon, Pike, Wayne, Luzerne, Lackawanna, Lehigh and Northampton counties.

This year's Economic Scorecard sends a clear message that there is still work to be done as we continue our strategic efforts to revitalize Monroe County's economy. While other counties have had fluctuating rankings, Monroe County has held its place, coming in at fifth in 2014 and 2017, seventh in 2015 and 2016, and tied for sixth in 2018.

This year, four counties: Carbon, Lackawanna, Luzerne and the historically top-ranking Lehigh County – witnessed significant drops in their overall scores. However, Monroe and Northampton Counties held steady compared to last year's overall scores. Monroe County actually ranked first on Total Civilian Labor Force Growth and was the only county to experience positive growth in this indicator. Monroe also tied for second with Pike in Total Employment Growth by Place of Residence. Our hard work is paying off!

The 2018 Scorecard also features an update from the Monroe 2030 Action Team in collaboration with the Monroe County Commissioners. Their efforts this year included engaging the Monroe County Planning Commission in more proactive strategies and hiring a professional planner to develop a comprehensive infrastructure proposal for Monroe County.

As we reflect on the past five years and plan for the future, let's keep in mind that our joint goal is to make Monroe County a better place to live, learn, work and play. This Scorecard serves as an annual assessment tool that empowers us to stay focused and to track our progress as we transform Monroe County into the best place to do business in Pennsylvania.

As East Stroudsburg University celebrates its 125th anniversary, we value your continued support and applaud the transformation of our campus and community.

Thank you.

A handwritten signature in black ink that reads "Marcia G. Welsh". The signature is written in a cursive, flowing style.

Marcia G. Welsh, Ph.D.

President

**The 2018 Economic Scorecard of Monroe County** is the fifth annual report prepared by the Business and Economic Research Group (BERG) of East Stroudsburg University.

The geographic area of study consists of eight adjacent counties located in Northeast Pennsylvania: Carbon, Lackawanna, Lehigh, Luzerne, Monroe, Northampton, Pike, and Wayne.

The eight counties are compared and ranked in the areas of Employment, Earnings, Business Climate, Healthcare, Housing, and Education.

The 2018 Scorecard presents the most recent rankings based on the newest available data and compares them to those of previous years.



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# OVERVIEW

The **2018 Economic Scorecard of Monroe County** is the fifth annual report prepared by the Business and Economic Research Group (BERG) of East Stroudsburg University.

The geographic area of study consists of eight adjacent counties located in Northeast Pennsylvania: Carbon, Lackawanna, Lehigh, Luzerne, Monroe, Northampton, Pike, and Wayne.

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## EMPLOYMENT

The Employment section of the 2018 Scorecard rates the labor markets of the eight counties using four indicators: Labor Force Growth, Employment Growth by Place of Employment, Employment Growth by Place of Residence, and Employment-to-Civilian Labor Force Ratio.

Counties are scored in each employment indicator and the sum leads to the overall employment rankings.



### Labor Force Growth

Monroe County had the only positive labor force growth rate in 2017. Wayne had zero growth and the remaining six counties experienced a decreasing labor force.

### Employment Growth by Place of Employment (Job Creation)

Northampton experienced a 3.1% increase in the number of jobs within the county and received the highest score of 8. Monroe and Pike tied for the second highest job growth with identical 2.4% growth rates.

Carbon had the lowest job growth with a negative growth rate (-0.1%).

### Employment Growth by Place of Residence

County employment grew modestly for all eight counties. Wayne County had the highest employment growth rate (0.9%). Monroe and Pike were tied for second place with 0.4% employment growth.

Carbon County scored last with zero employment growth.

### Employment-to-Civilian Labor Force

The employment-to-labor force ratio measures the percentage of a county's labor force that is actually employed and is considered an indicator of how the local workforce is utilized.

Northampton and Wayne were tied for first place in this category with 95.1% employment-to-labor force ratios.

Monroe County had the lowest employment-to-labor force ratio at 94.0% in spite of the above average job and employment growth experienced by the county. The lower ratio is attributed to the growth in the labor force exceeding the growth in the number of jobs available.

### Overall Employment Rankings

Wayne County earned the highest overall employment ranking because of high employment growth that led to the highest employment-to-labor force ratio.

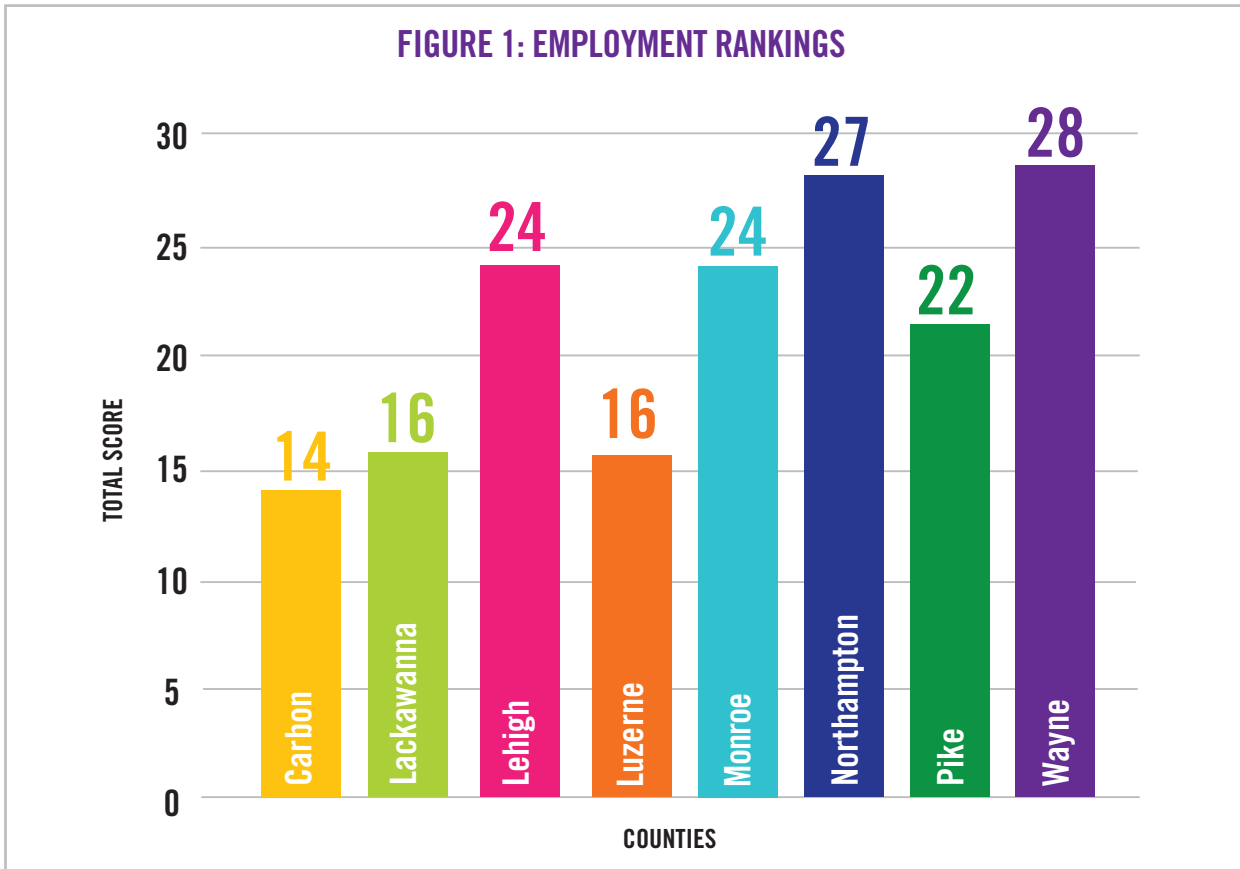
Northampton placed second in the employment category with high job growth and a high employment ratio.

Monroe and Lehigh were tied in third place.

Carbon, Lackawanna and Luzerne ranked last in the employment category.

**TABLE 1: EMPLOYMENT INDICATORS**

	Pennsylvania	Carbon	Lackawanna	Lehigh	Luzerne	Monroe	Northampton	Pike	Wayne
<b>Civilian Labor Force Growth 2016-2017</b>									
	-0.4%	-0.3%	-0.5%	-0.2%	-0.3%	0.1%	-0.1%	-0.4%	0.0%
SCORE		4	2	5	4	8	6	3	7
<i>Source: Pennsylvania Department of Labor and Industry LAUS</i>									
<b>Full-time and Part-time Employment (number of jobs) Growth 2015-2016 (Job Creation)</b>									
	1.1%	-0.1%	0.8%	1.8%	1.1%	2.4%	3.1%	2.4%	1.5%
SCORE		2	3	6	4	7	8	7	5
<i>Source: Bureau of Economic Analysis</i>									
<b>Employment Growth 2016-2017 (Employment by Place of Residence)</b>									
	0.1%	0.0%	0.1%	0.2%	0.1%	0.4%	0.1%	0.4%	0.9%
SCORE		4	5	6	5	7	5	7	8
<i>Source: Pennsylvania Department of Labor and Industry LAUS</i>									
<b>Employment-to-Civilian Labor Force Ratio 2017</b>									
	95.1%	94.3%	94.9%	95.0%	94.1%	94.0%	95.1%	94.4%	95.1%
SCORE		4	6	7	3	2	8	5	8
<i>Source: Pennsylvania Department of Labor and Industry LAUS</i>									



# EARNINGS

The 2018 Scorecard uses five indicators to rate counties in the Earnings category. The first indicator is a measure of the average income of county residents expressed as a percentage of the state average.

The second indicator is the annual growth rate of per capita personal income.

The third is the average earnings per job in the county expressed as a percentage of the state average.

The fourth measures the most recent growth in earnings.

The fifth indicator is the poverty rate, which estimates the percentage of county residents with incomes lower than the poverty threshold. Counties with lower poverty rates receive higher scores.



## Per Capita Personal Income

This indicator measures the average income per person from all sources relative to the state average.

Lehigh and Northampton residents received the highest income in the 2018 Scorecard: \$48,712 or approximately 96% of the state average.

Carbon placed second in this category with per capita income of \$45,668 or 90% of the state average.

Monroe and Wayne Counties placed last with per capita income at 77% of the state average.

## Per Capita Personal Income Growth

The highest income growth was recorded by Wayne County (3.8%). Carbon had the second highest income growth (3.3%) and Monroe was third (3.1%).

The lowest per capita income growth was recorded in Lehigh County (1.8%), slightly below Northampton's 2.2% growth.

## Average Earnings per Job

This is primarily the average income of wage earners in a county.

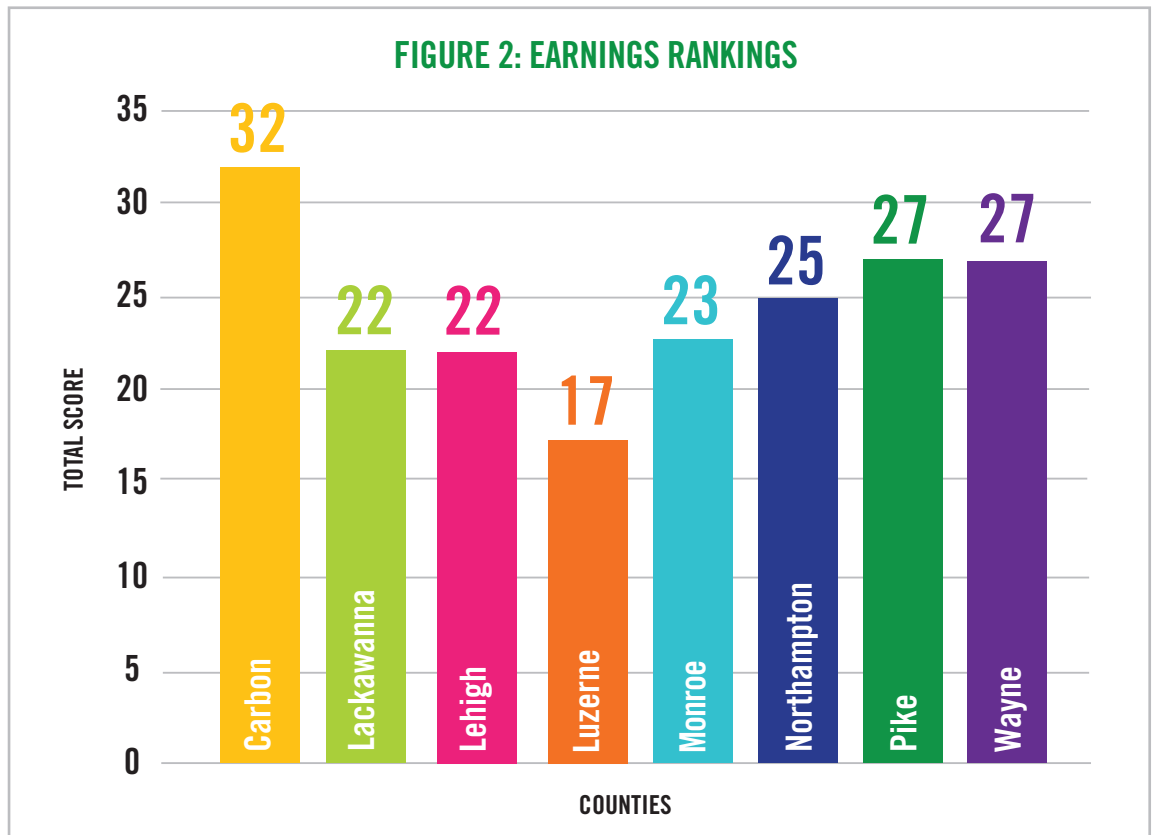
Lehigh County recorded the highest average earnings per job (102% of the state average).

Carbon was second (97%) and Northampton was third (87%).

Monroe, Lackawanna, and Luzerne were tied in fourth place (80%).

Wayne and Pike had the lowest earnings per job at 72% and 62% respectively.

FIGURE 2: EARNINGS RANKINGS



**TABLE 2: EARNINGS INDICATORS**

	Pennsylvania	Carbon	Lackawanna	Lehigh	Luzerne	Monroe	Northampton	Pike	Wayne
<b>Per Capita Personal Income as a % of PA - 2016</b>									
	\$50,742	90%	86%	96%	82%	77%	96%	83%	77%
SCORE		7	6	8	4	3	8	5	3
<i>Source: Bureau of Economic Analysis</i>									
<b>Per Capita Personal Income Growth 2015 - 2016</b>									
	1.9%	3.3%	2.3%	1.8%	2.7%	3.1%	2.2%	2.9%	3.8%
SCORE		7	3	1	4	6	2	5	8
<i>Source: Bureau of Economic Analysis</i>									
<b>Average Earnings per Job (dollars) as a % of PA - 2016</b>									
	\$59,285	97%	80%	102%	80%	80%	87%	62%	72%
SCORE		7	5	8	5	5	6	3	4
<i>Source: Bureau of Economic Analysis</i>									
<b>Growth in Average Earnings per Job (dollars) 2015 - 2016</b>									
	0.1%	2.0%	1.2%	1.0%	0.7%	0.8%	0.4%	2.1%	2.2%
SCORE		6	5	4	2	3	1	7	8
<i>Source: Bureau of Economic Analysis</i>									
<b>All Ages in Poverty (%) - 2016</b>									
	12.9%	13.1%	14.1%	16.8%	14.6%	12.0%	9.3%	9.8%	13.7%
SCORE		5	3	1	2	6	8	7	4
<i>Source: Census Bureau Small Area Income and Poverty Estimates</i>									

**Growth in Average Earnings per Job**

Wayne had the highest earnings growth (2.2%).  
 Pike the second highest earnings growth (2.1%).  
 The average earnings growth in Monroe County was 0.8%.  
 The lowest growth in earnings was recorded in Northampton County (0.4%).

**Poverty Rates**

Northampton, Pike and Monroe had poverty rates considerably lower than the state average.  
 Carbon, Lackawanna, Luzerne and Wayne had poverty rates higher than the state average.  
 Lehigh County had the highest poverty rate (16.8%) and Pike's poverty level was well below the state average.

**Overall Earnings Rankings**

Carbon County ranked first in the Earnings category due to consistently strong performance in many categories although its poverty level was slightly higher than the state average. Wayne and Pike ranked second in the earnings category. Wayne's high rank in this category was caused by high growth rates in per capita income and average job earnings. Monroe County ranked fifth.

In general, counties with high income and earnings also had relatively low income and earnings growth, and relatively low income counties seemed to record higher income growth rates. In the long run, this may lead to low income counties converging toward the higher income counties.

# BUSINESS CLIMATE

The 2018 Scorecard uses six indicators to determine the existence of favorable conditions that stimulate economic development, business creation and growth in each county.

The first indicator estimates the relative magnitude of the entrepreneurial class.

The second measures the share of small firms' employment in the county.

The third gauges the extent of the "creative class."

The fourth indicator is the percentage of the county workforce with scientific and technical skills.

The fifth measures the extent of business concentration by estimating the employment share of the four largest industries in the county. The higher the employment concentration, the lower the degree of business diversity.

The sixth indicator is the crime rate, since lower crime rates enhance the quality of living and working environments.



## Proprietors' Income as a Percentage of County Personal Income

Proprietors' income captures the income of the entrepreneurial class in each county.

In Carbon County, proprietors' income was 18.7% of the total income, more than twice the average Pennsylvania rate of 9.1%.

Lehigh and Wayne proprietors' incomes were 9.1% of the total while the remaining counties had much lower rates than the state average.

Monroe County's proprietors' income as a percentage of personal income was 6.5%.

## Small Firms as a Percentage of Total Employment

This indicator measures the relative importance of small firms in the county economy.

Pike County scored the highest in this category with 52% of its workforce employed by small firms.

Wayne was second (45.2%), Carbon third (41.5%) and Monroe fourth (31.8%).

## Arts, Entertainment and Recreation as a Percentage of Total Employment

This indicator measures the size of the "creative class" that is often considered an important contributor to the quality of life and the business environment of a region.

The largest "creative class" was in Carbon (8.1%), followed by Pike (3.9%), and Monroe (3.1%).

## Employment in Technical Occupations (Architecture-Engineering-Computer-Mathematical) as a Percentage of Total Employment

Scientific and technical skills are associated with higher incomes and may attract firms that wish to locate in a particular area.

Lehigh County scored the highest in this category with 4.5%, followed by Northampton (3.5%) and Monroe (3.1%).

## Top Four Industry Percentage Employment Share

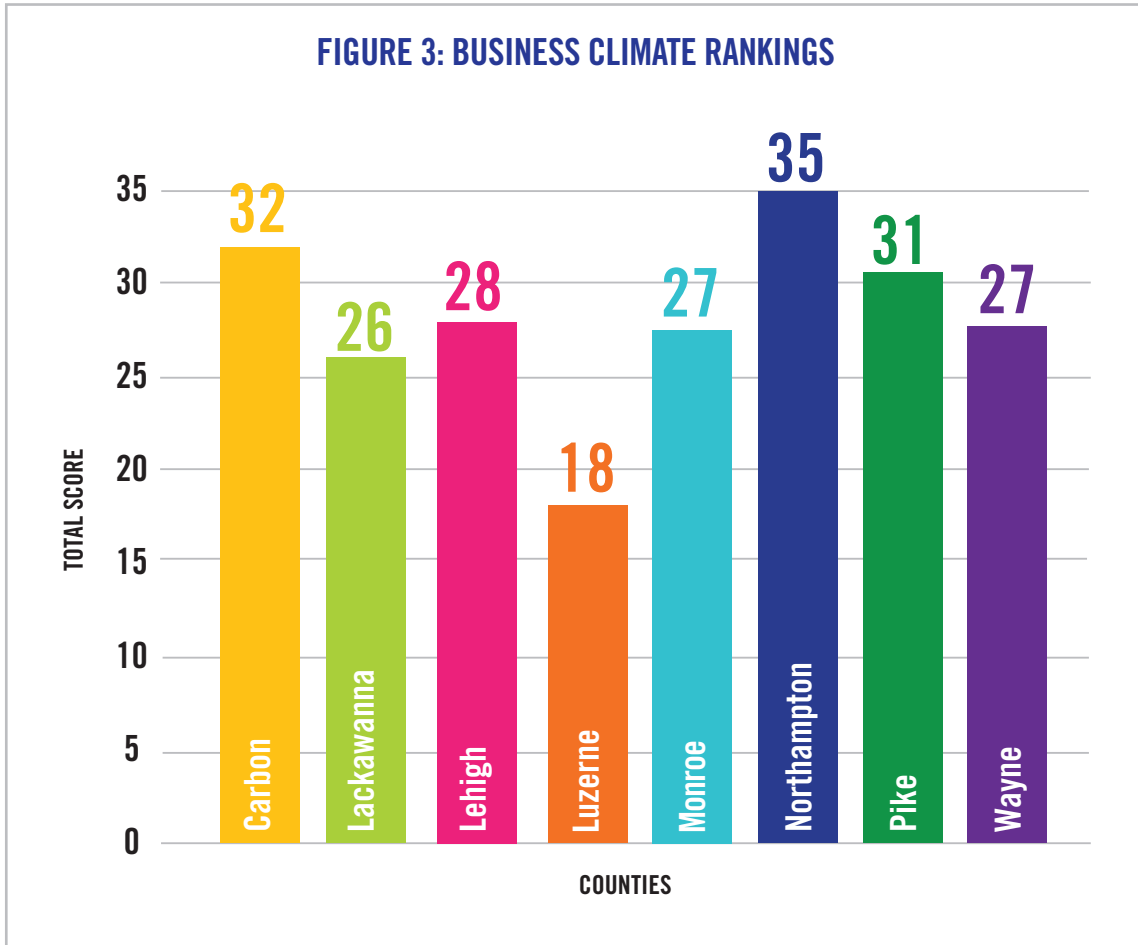
This is a measure of concentration in a county. The higher the percentage of workers employed by the four largest industries in a county, the lower the degree of industrial diversity.

Northampton County had the most diversified industrial economy with the lowest employment concentration ratio (42.6%).

Wayne County had the highest employment concentration in the top four industries (54.1%) followed by Monroe (53.8%).



**FIGURE 3: BUSINESS CLIMATE RANKINGS**



**Serious Crime Rate per 100,000 Population**

The regional crime rate is measured as the number of serious crimes per 100,000 people.

Low crime rates contribute to a higher quality of business and living environments.

The lowest crime rate was in Pike County (1,250.1) and the highest in Lehigh County (2,283.2).

Monroe County had the second highest crime rate (2,158.9).

**Overall Business Climate Rankings**

Northampton County was identified as having the most favorable business climate, followed by Carbon, Pike and Lehigh.

Monroe was ranked fifth in this category because of the relatively high crime rate and the lack of business diversity.

**TABLE 3: BUSINESS CLIMATE INDICATORS**

	Pennsylvania	Carbon	Lackawanna	Lehigh	Luzerne	Monroe	Northampton	Pike	Wayne
<b>Proprietors' Income as a % of Personal Income 2016</b>									
	9.1%	18.7%	6.0%	9.1%	4.8%	6.5%	6.7%	6.4%	9.1%
SCORE		8	3	7	2	5	6	4	7
<i>Source: Bureau of Economic Analysis</i>									
<b>Small Firms (0-49 employees) as a % of Total Private Employment 2017 Q2</b>									
	27.1%	41.5%	27.0%	21.8%	25.2%	31.8%	28.4%	52.0%	45.2%
SCORE		6	3	1	2	5	4	8	7
<i>Source: Quarterly Workforce Indicators</i>									
<b>Arts, Entertainment, and Recreation as a % of Total Employment 2017</b>									
	1.7%	8.1%	1.3%	1.9%	1.0%	3.1%	1.6%	3.9%	1.1%
SCORE		8	3	5	1	6	4	7	2
<i>Source: Quarterly Census of Employment and Wages</i>									
<b>Employment in Technical (Architecture, Engineering, Computer, and Mathematical) Occupations as a % of Total Employment - 2017</b>									
	4.5%	1.3%	2.9%	4.5%	2.7%	3.1%	3.5%	0.7%	1.2%
SCORE		3	5	8	4	6	7	1	2
<i>Source: Occupational Employment Survey (OES)</i>									
<b>Top 4 Industry % Employment Share 2016</b>									
	44.1%	49.9%	46.5%	46.9%	47.0%	53.8%	42.6%	53.8%	54.1%
SCORE		4	7	6	5	3	8	3	2
<i>Source: Bureau of Economic Analysis</i>									
<b>Serious Crime Rate (Part I Offenses) Per 100,000 Population - 2016</b>									
	2,063.6	2,100.1	1,838.3	2,283.2	2,098.0	2,158.9	1,782.9	1,250.1	1,261.9
SCORE		3	5	1	4	2	6	8	7
<i>Source: Pennsylvania Annual Uniform Crime Report</i>									

# HEALTHCARE

The 2018 Scorecard evaluated the availability of healthcare facilities and trained healthcare professionals using five indicators.

The number of hospital beds per 1,000 people and nursing home beds per 1,000 people estimated the adequacy of healthcare facilities.

Ambulatory center employees, number of physicians per 1,000 people and the number of registered nurses per 1,000 people estimated the relative availability of trained healthcare professionals in the area.

Note: The Pennsylvania Department of Health does not publish data on ambulatory center employees by county, like it did in previous years, so for the 2018 Scorecard the data had to be computed by adding payroll employees in ambulatory/surgery centers located in each of the eight counties. The computed data should be consistent with the statistics published in previous years.

The Pennsylvania Department of Health also did not update their data on physicians and registered nurses by county, so the 2018 Scorecard uses the latest statistics available. The data will be updated at the end of 2018 when new statistics are released by the Bureau of Health Planning, Division of Health Professions Development.

## General Hospital Beds per 1,000 People

Lehigh County had the largest number of hospital beds per 1,000 people (4.5).

Lackawanna was ranked second in this category (3.1). Monroe had 1.4 hospital beds per 1,000 people.

## Nursing Home Beds per 1,000 people over 65 Years Old

Lackawanna had the largest number of nursing home beds per 1,000 people (58.7).

Lehigh County was second in this category (46.3) and Luzerne third (44.9). Monroe was seventh with 19.1 nursing home beds per 1,000 people.

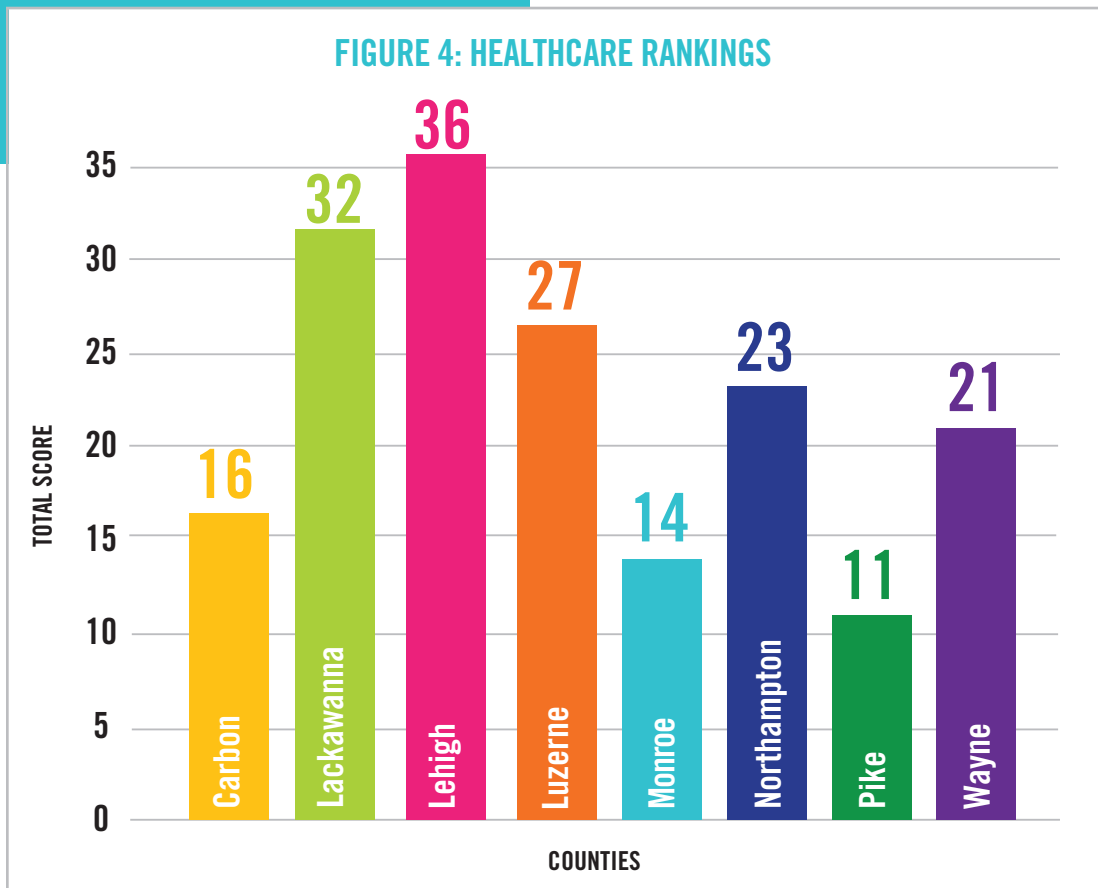
## Ambulatory Surgery Centers-Total Employees per Operating Room

Wayne County scored the highest in this category with 13.0 employees per ambulatory center.

Pike was second (11.0), Northampton was third (9.8) and Monroe was seventh (8.6).



FIGURE 4: HEALTHCARE RANKINGS



**TABLE 4: HEALTHCARE INDICATORS**

	Pennsylvania	Carbon	Lackawanna	Lehigh	Luzerne	Monroe	Northampton	Pike	Wayne
<b>General Hospital Beds per 1,000 (2016)</b>									
	2.5	2.5	3.1	4.5	2.4	1.4	1.1	0.0	1.7
SCORE		6	7	8	5	3	2	1	4
<b>Licensed/Approved Nursing Home Beds per 1,000 Population Age 65 and Older (2016)</b>									
	39.6	33.5	58.7	46.3	44.9	19.1	37.3	9.1	33.2
SCORE		4	8	7	6	2	5	1	3
<b>Ambulatory Surgery Centers - Total Employees per Operating Room (2016)</b>									
	NA	7.0	8.7	9.3	9.0	8.6	9.8	11.0	13.0
SCORE		1	3	5	4	2	6	7	8
<b>Number of Physicians per 1,000 (2014) #</b>									
	2.7	1.2	2.3	4.1	2.2	1.4	1.8	0.4	1.1
SCORE		3	7	8	6	4	5	1	2
<b>Number of Registered Nurses per 1,000 (2012/2013) #</b>									
	12.1	5.6	13.3	17.8	12.4	6.2	8.2	1.6	7.7
SCORE		2	7	8	6	3	5	1	4

Note: # PA Health Profiles 2017 did not update these numbers from the last survey.

Source: Pennsylvania and County Health Profiles

### Number of Physicians per 1,000 People

Lehigh County was ranked first with 4.1 physicians per 1,000 people.

Lackawanna was second in this category with 2.3, Luzerne was third with 2.2, and Monroe was ranked fifth with 1.4.

### Number of Registered Nurses per 1,000 People

Lehigh County had the largest number of registered nurses per 1,000 people (17.8).

Lackawanna was second (13.3), Luzerne third (12.4), and Monroe sixth with 6.2.

### Overall Healthcare Rankings

Lehigh has been the leading healthcare county in every scorecard because the region has evolved into a major healthcare center, where many residents of other counties seek professional medical services.

Lackawanna was ranked second and Luzerne third overall in the health category. Monroe County ranked seventh and Pike ranked eighth.

# HOUSING

The 2018 Scorecard uses four indicators to score counties in terms of housing affordability and new construction.

Housing affordability is measured by the relative cost of home ownership calculated as the ratio of house value to median income and also the relative cost of rental housing as the ratio of average rent to median income.

Trends in new construction are measured by building permits issued in each county and the growth in building permits over time.



## Median House Value as a Percentage of Median Income

Luzerne had the lowest house value to income ratio, meaning that house ownership was the most affordable in that county.

Carbon County was second and Monroe County was third in house ownership affordability.

Wayne County had the highest house value to income ratio, meaning that home ownership is least affordable in Wayne.

## Median Annual Gross Rent as a Percentage of Median Income

This indicator measures the affordability of rental housing.

Again, Luzerne had the lowest rent to income ratio (18.3%) and thus the most affordable rental housing.

Lackawanna was second in this category.

Monroe County (21.2%) and Pike County (22.2%) had the least affordable rent to income ratios.

## Single Family Building Permits in 2017 as a Percentage of 2007

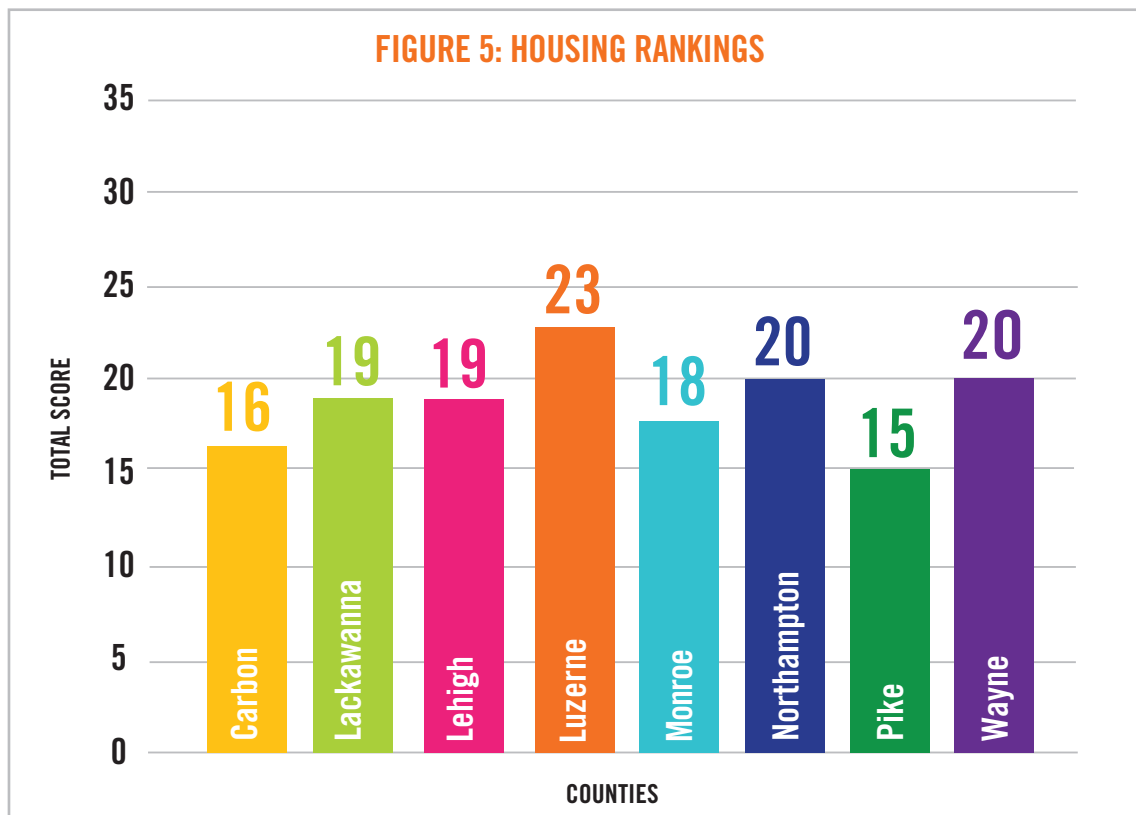
This indicator attempts to measure the degree of recovery that the construction industry has experienced since the national housing crisis of 2007.

Lehigh County showed the most robust rate of recovery at 48.3% of its peak in the last decade.

Wayne County was second in this category (38.6%). Monroe County was ranked sixth in this category (27.6%).

It is interesting to note that the Pennsylvania state average rate was 57.1%. This indicates that Northeast Pennsylvania counties have not recovered from the housing crisis as well as other areas in the state.

FIGURE 5: HOUSING RANKINGS



**TABLE 5: HOUSING INDICATORS**

	Pennsylvania	Carbon	Lackawanna	Lehigh	Luzerne	Monroe	Northampton	Pike	Wayne
<b>Median House Value as a % of Median Income (2012-2016)</b>									
	305%	278%	315%	333%	265%	289%	331%	295%	345%
<b>SCORE</b>		7	4	2	8	6	3	5	1
<i>Source: American Community Survey</i>									
<b>Median Annual Gross Rent as a % of Median Income (2012-2016)</b>									
	18.8%	19.0%	18.4%	19.9%	18.3%	21.2%	18.5%	22.2%	19.3%
<b>SCORE</b>		5	7	3	8	2	6	1	4
<i>Source: American Community Survey</i>									
<b>Single Family Building Permits in 2017 as a % of 2007</b>									
	57.1%	11.7%	33.3%	48.3%	33.8%	27.6%	34.6%	12.1%	38.6%
<b>SCORE</b>		1	4	8	5	3	6	2	7
<i>Source: U.S. Census Bureau</i>									
<b>Single Family Building Permit per 1,000 People - 2017**</b>									
	1.2	0.8	0.9	1.4	0.7	1.5	1.1	1.5	2.2
<b>SCORE</b>		3	4	6	2	7	5	7	8
<i>Note: ** Population numbers are based on Census Population Estimates for 2017.</i>									
<i>Source: U.S. Census Bureau</i>									

**Single Family Building Permits per 1,000 People**

This is a leading indicator of the building activity that is expected to occur in each county in the near future.

Wayne County issued the largest number of building permits relative to population in 2017 (2.2).

Tied for second place were Monroe and Pike with 1.5 building permits per 1,000 people.

This indicator suggests that building activity in Wayne, Monroe, and Pike is increasing at a higher rate than the other counties.

**Overall Housing Rankings**

Luzerne County ranked first in the housing category because of the relatively low house prices and rental cost.

Northampton and Wayne were tied for the second place in the housing category because of the relatively high building activity that has occurred in those counties.

Monroe ranked fourth because of the relatively high rental costs and slow recovery from the housing crisis.

# EDUCATION

The 2018 Scorecard uses two indicators to evaluate educational levels in each county, one indicator to measure change in the educational levels, and one indicator to estimate the investment in human capital.

County educational levels are measured by the percentage of adult residents without a high school degree and the percentage of county residents with a college degree.

The change in the percentage of college graduates is derived by comparing that percentage in two different time periods.

The investment in education (human capital) is estimated by K-12 school expenditures per student.



## Percentage of Population 25 Years and Older with No High School Degree

The highest percentage of adults without a high school degree was recorded in Lehigh County (12.0%).

The lowest rate was recorded in Pike County (9.2%). In Monroe County the percentage of the adult population with no high school degree was 10.5%.

## Change in Percentage of Population with Bachelor's Degree or Higher

Lehigh County also had the highest percentage of college-educated adults (28.9%). Northampton County ranked second in this category with a 27.9% college-educated population.

Monroe County ranked fifth with 23.6%. Carbon had the lowest percentage of adult residents with college degrees (16.0%).

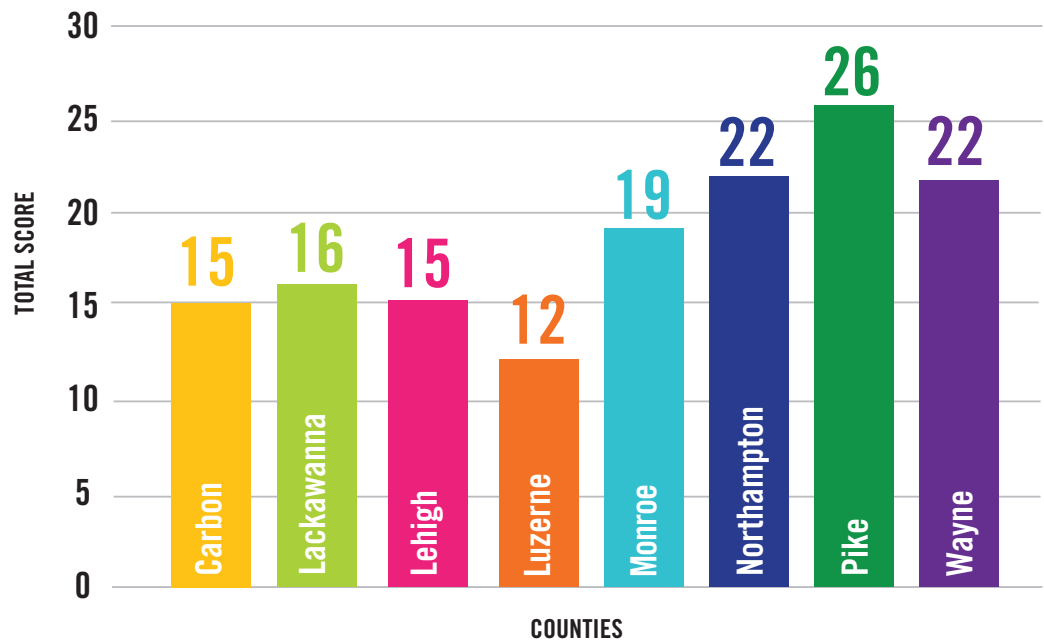
## Growth in College Educated Population

Pike County had the largest growth rate in college-educated population (6.8%).

Wayne had the second highest growth of county residents with a college degree (4.1%).

Monroe County ranked fifth with 2.6% growth in the college-educated population.

FIGURE 6: EDUCATION RANKINGS



**TABLE 6: EDUCATION INDICATORS**

	Pennsylvania	Carbon	Lackawanna	Lehigh	Luzerne	Monroe	Northampton	Pike	Wayne
<b>% of Population 25 Years and Over with No High School Degree or Equivalency Degree (2012-2016)</b>									
	10.4%	10.7%	9.9%	12.0%	10.9%	10.5%	9.6%	9.2%	10.2%
<b>SCORE</b>		3	6	1	2	4	7	8	5
<i>Source: American Community Survey</i>									
<b>% of Population 25 Years and Over with a Bachelor's Degree or Higher (2012-2016)</b>									
	29.3%	16.0%	26.1%	28.9%	22.1%	23.6%	27.9%	25.3%	20.5%
<b>SCORE</b>		1	6	8	3	4	7	5	2
<i>Source: American Community Survey</i>									
<b>Change in % of Population 25 Years and Over With a Bachelor's Degree or Higher between 2011-2015 &amp; 2012-2016</b>									
	2.4%	3.2%	0.8%	1.4%	3.3%	2.6%	2.6%	6.8%	4.1%
<b>SCORE</b>		5	2	3	6	4	4	8	7
<i>Source: American Community Survey</i>									
<b>K-12 School Expenditures Per Student (Average Daily Membership) 2016-2017 (in dollars)</b>									
	\$17,736	\$19,149	\$14,808	\$16,171	\$14,402	\$21,085	\$16,686	\$17,275	\$21,494
<b>SCORE</b>		6	2	3	1	7	4	5	8
<i>Source: Pennsylvania Department of Education</i>									

**K-12 School Expenditures per Student**

Wayne County had the largest amount of school expenditures per student in 2017 (\$21,494).  
 Monroe County was second with expenditures of \$21,085 per student.  
 Luzerne had the lowest school expenditures per student (\$14,402).

**Overall Education Rankings**

Pike County was ranked first in the education category because of the lowest percentage of adult population without a high school degree and the highest growth rate of college-educated population.  
 Northampton and Wayne tied for second place, and Monroe County was ranked third overall in the education category.



# 2018 SUMMARY OF FINDINGS

Following the same methodology used in the 2015, 2016 and 2017 Scorecards, the 2018 Monroe County Economic Scorecard ranked the eight counties of Northeast Pennsylvania (Carbon, Lackawanna, Lehigh, Luzerne, Monroe, Northampton, Pike and Wayne) in six different areas<sup>1</sup>:

**Employment**

**Earnings**

**Business Climate**

**Healthcare**

**Housing**

**Education**

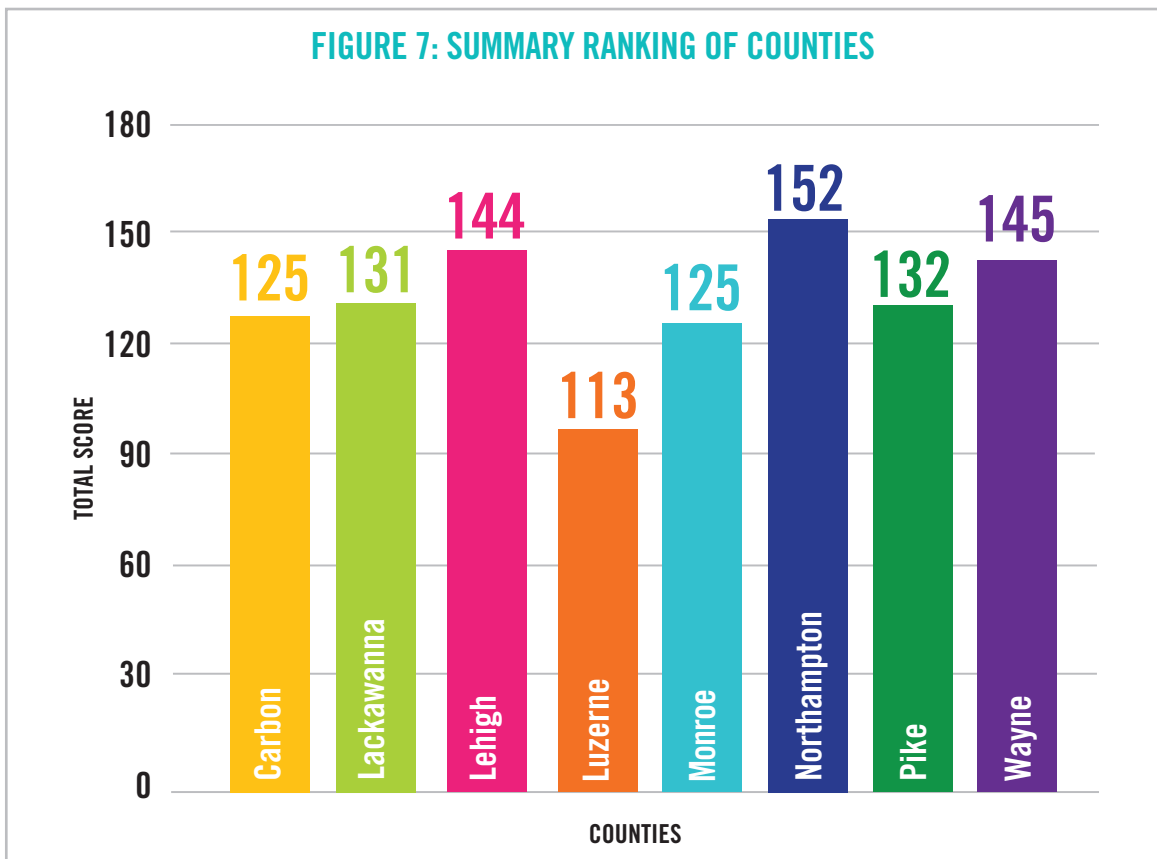
In the 2018 Scorecard, Northampton County was ranked first overall because it earned high marks in Employment, Earnings, Business Climate and Education. Northampton had ranked second, behind Lehigh County, in all previous scorecards. It is important to point out that the scorecards used the same rating methods and the same indicators for comparison from 2015. Even in the 2014 Scorecard,

which didn't include Wayne or Carbon counties or the Business Climate indicator, Northampton was behind Lehigh County.

Wayne County was ranked second overall in the 2018 Scorecard because of high employment growth, high earnings growth and improved educational levels. The second place rank of Wayne was surprising because the county finished last in the 2016 and 2017 Scorecards.

Lehigh County was ranked first in all previous scorecards. However, in the 2018 Scorecard, Lehigh moved to third position overall in spite of high scores in Healthcare and Employment. The decline of Lehigh County was caused by low scores in the Education category and low-rated Business Climate. Lehigh County residents received the highest per capita income but had the lowest growth in per capita income. Average earnings per job in Lehigh County were higher than all other counties but the growth in earnings was very low.

Pike County was ranked fourth overall in the 2018 Scorecard because of high marks in earnings growth, first place finish in the Education category and relatively good ratings in the Employment and Business Climate areas. Pike County was ranked last in the Healthcare and Housing categories. It is worth pointing out that the overall ranking of Pike County improved in recent years.



<sup>1</sup>The 2014 Scorecard did not include Carbon or Wayne counties or the Business Climate indicator.

**TABLE 7: SUMMARY RANKING OF COUNTIES**

Total Score	Carbon	Lackawanna	Lehigh	Luzerne	Monroe	Northampton	Pike	Wayne
<b>Employment</b>	14	16	24	16	24	27	22	28
<b>Earnings</b>	32	22	22	17	23	25	27	27
<b>Business Climate</b>	32	26	28	18	27	35	31	27
<b>Healthcare</b>	16	32	36	27	14	23	11	21
<b>Housing</b>	16	19	19	23	18	20	15	20
<b>Education</b>	15	16	15	12	19	22	26	22
<b>Overall Score</b>	125	131	144	113	125	152	132	145
<b>Overall Rank</b>	6	5	3	8	6	1	4	2

Lackawanna County was ranked fifth overall in the 2018 Scorecard after being ranked third overall behind Lehigh and Northampton in all previous scorecards. The decline of Lackawanna may be explained by low scores in Employment, Earnings and Education.

Carbon County had negative job growth and zero employment growth but relatively high earnings per job and highly rated business climate. Carbon and Monroe tied for sixth place overall in the 2018 Scorecard.

Monroe County received high marks in the Employment category and relatively favorable Business Climate, but high crime rates and low scores in Healthcare, Housing and Education contributed to the County's lower overall performance. The improvement in overall ranking of Pike and Wayne counties pushed Monroe County lower in the 2018 Scorecard.

Luzerne County continued to decline and was ranked last among the eight counties in the 2018 Scorecard because of very low scores in Employment, Earnings, Business Climate and Education. Luzerne was in fourth place in the 2014 and 2015 Scorecards, dropped to fifth place in 2016 and sixth place in 2017, and ranked last in 2018.

### Observations and Conclusions

Overall county rankings remained steady over the past year, with the exception of Wayne and Pike Counties where significant progress was made. Wayne excelled in Employment and Education and Pike saw high growth in Earnings and placed first in the Education Indicator.

Counties with high levels of income and employment experienced low rates of growth - Lehigh, Northampton, Carbon.

Counties with lower levels of income and employment recorded higher growth rates - Wayne and Pike.

Luzerne County continued to decline in overall ranking for the fourth consecutive year.

Lackawanna County dropped from its third place rank in the four previous scorecards to fifth place in the 2018 Scorecard.

Lehigh County was ranked first in the four previous scorecards but dropped to third place in 2018.

Northampton County became the new top-ranked county in 2018.

Wayne County was ranked second overall in 2018 after being ranked last overall in 2016 and 2017.

Pike County improved its overall ranking to fourth in 2018 compared to its lower overall ranking in previous scorecards.

**TABLE 8: SCORECARD RANKINGS**

2014	2015	2016	2017	2018
Lehigh 1	Lehigh 1	Lehigh 1	Lehigh 1	Northampton 1
Northampton 2	Northampton 2	Northampton 2	Northampton 2	Wayne 2
Lackawanna 3	Lackawanna 3	Lackawanna 3	Lackawanna 3	Lehigh 3
Luzerne 4	Luzerne 4	Carbon 4	Carbon 4	Pike 4
Monroe 5	Carbon 5	Luzerne 5	Monroe 5	Lackawanna 5
Pike 6	Wayne 6	Pike 6	Luzerne 6	Carbon 6
	Monroe 7	Monroe 7	Pike 7	Monroe 6
	Pike 8	Wayne 8	Wayne 8	Luzerne 8

Note: Carbon and Wayne counties as well as Business Climate Indicator were added in the 2015 Scorecard.

## FIVE-YEAR TRENDS

### Monroe County 2014-2018

A five year assessment of Monroe County's overall rankings as reported in the Monroe County Economic Scorecards shows neither significant improvement nor decline. Monroe County was ranked fifth overall in 2014, seventh in 2015, sixth in 2016, fifth in 2017 and sixth in 2018.

Monroe County is generally doing very well on many fronts. The labor force is growing consistently with impressive job creation (Total Employment Growth) during the last two years. Employment Growth by Place of Residence has also been strong in the last three years; one area in which the County lags is the Employment-to-Civilian Labor Force Ratio, where Monroe County is consistently at the bottom. The reason is simple: the Monroe County labor force is growing well and employment growth is also strong. However, in order to increase the Employment-to-Civilian Labor Force Ratio, employment growth has to be faster than labor force growth. This is an opportunity for Monroe County leaders to develop policies to meet these challenges.

Earnings Indicators tell a different story. Monroe County's Per Capita Income Growth has been consistently high during the last four years. However, the Per Capita Personal Income level was low to begin with (73% of the Pennsylvania Average during 2013) and increased to

77% of state average in 2018, representing one of the lowest rankings in the region. Throughout the five years, Monroe County's Average Earnings Per Job has remained in the middle compared to neighboring counties. The poverty level has been dropping steadily during the last three years: 13.3% in 2016, 12.7% in 2017 and 12% in 2018. The favorable trend could be related to better employment growth during recent years as supported by Total Employment Growth.

The Business Climate Indicator shows that Monroe County's entrepreneurial performance has been slightly above average compared to neighboring counties as reflected in the Percentage of Proprietors' Income and Percentage of Employment in Small Firms. Monroe County's strong entrepreneurial base supports the creative class and employment in STEM fields (science, technology, engineering and math). In both of these measures Monroe County is consistently ranked in the top two or three counties.

However, there are two areas where Monroe County has the opportunity to improve: (1.) Monroe County's four largest industries (Accommodation and Food Services, Retail Trade, Healthcare and Social Assistance, and Educational Services) employ approximately 53% of the workforce, which means that the county's economic health depends heavily on these sectors; (2.) Monroe County's Serious Crime Rate per 100,000 population is consistently high, placing the county at the bottom of the rankings.

The Healthcare Indicator reveals that Monroe County can improve in many areas – Ambulatory Surgery Center Employees per Operating Room dropped consistently from 21.5 to 8.6 and the Number of Nursing Home Beds per 1,000 Population fell from 22.9 in the first scorecard to 19.1 in the 2018 Scorecard.

Monroe County continues to rank in the middle in Number of Hospital Beds, Number of Physicians, and Number of Registered Nurses per 1,000 population. Lehigh County has held first place ranking in the Healthcare Indicator during the last five years. The expansion of the Lehigh Valley Health Network and St. Luke's University Health Network into Monroe County will likely improve healthcare services.

Housing is another indicator of concern in Monroe County. While housing prices have dropped, making housing more affordable over the years, the cost of renting is consistently high in Monroe County. For example, Median House Value as a Percentage of Median Income consistently dropped from 343% to 289%; whereas the Median Annual Gross Rent as a Percentage of Median Income increased from 20% to 21.2% in 2017 and remained at 21.2% in this year's scorecard, making Monroe County one of the most expensive areas to rent housing. Monroe County has also experienced a steady increase in Single Family Building Permits, indicating the continuing recovery following the deep decline in the real estate bubble a decade ago.

The Education Indicator shows that Monroe County has made some progress in key measures. In K-12 Expenditures per Student, Monroe County consistently leads the rankings. Many economists would argue that higher educational expenditures result in more resources for children. In Monroe County, 90% of the adult population holds a high school diploma, and 23.6% of the adult population has a college degree — placing Monroe County in the middle rankings.

Over the past five years, Monroe County has made good progress in employment, earnings and business climate. There is great potential to grow in the housing sector and especially healthcare. The County's performance in the education field remains steady.

## **Monroe County Observations and Conclusions**

The final overall rankings of Monroe County in the five scorecards (2014-2018) show neither improvement nor significant decline.

### **Areas of Improvement**

The number of jobs created by Monroe County business decreased in 2015 and 2016 but increased by 2.3% in 2017 and 2.4% in 2018.

The Employment-to-Labor Force ratio continued to rise from 90.6% in 2014 to 92.6% in 2015, 93.7% in 2016 and 2017, and 94% in 2018.

The overall Earnings score improved from 18 points in 2015 to 20 in 2016, and 23 in 2017 and 2018.

The Business Climate of Monroe County showed slight improvement from 2015 to 2018 except for the persistently high crime rate.

The overall Housing score also showed continuous improvement rising from 11 points in 2015 to 18 points in 2018.

### **Areas of Decline**

The two categories where Monroe County experienced declining overall scores were Healthcare and Education.

The Healthcare overall score for Monroe declined from 19 in 2015 to 14 in 2018.

The Education overall score for the County decreased from 26 in 2015 to 19 in 2018.

# Monroe 2030 Action Team

## RE-ENERGIZING OUR ECONOMY Status Report 2018

The Monroe 2030 Action Team is a small group of community leaders and volunteers committed to revitalizing Monroe County's economy and creating a thriving community where we can live, learn, work and play. The Monroe 2030 initiative promotes the attraction and retention of business, the creation of family and community sustaining employment that also attracts millennials, entrepreneurs and commuters, and the preservation of the natural environment and culture of the region.

The past year has been productive for the Monroe 2030 Action Team and its Workforce Development and Small Business and Entrepreneurship Task Forces. Last year, the Monroe 2030 Executive Committee identified seven economic development priorities for Monroe County:

- 1 Engage the Monroe County Planning Commission in more proactive planning
- 2 Hire a professional planner who will work with the county and with the Pocono Mountains Economic Development Corporation (PMEDC) to develop a comprehensive plan
- 3 Develop a long term, comprehensive infrastructure plan
- 4 Pursue the idea of a community investment fund
- 5 Develop a guide for starting small businesses and get the word out
- 6 Develop a workforce development plan that sees the big picture and supports the work of a professional planner
- 7 Get townships to work together or invest resources in townships that are supportive and want to grow.

The Monroe County Commissioners agreed to focus on the following three priorities for FY 2017-2018. The status of each initiative is outlined below.

### **1 Engage the Monroe County Planning Commission in more proactive planning**

During the past year, the Monroe County Planning Commission spearheaded several initiatives that positively impacted county-wide planning.

- The development of the Monroe County Infrastructure Identification Program and the hiring of KRB Consulting Services, LLC in collaboration with the County Commissioners.
- The development of Short Term Rental Model Ordinance in cooperation with the Pocono Mountains Realtors Association.
- The successful development of Tax Increment Financing (TIF) Districts with the Pocono Mountains Economic Development Corporation.
- Provided assistance to 11 municipalities in meeting their federally mandated Municipal Separate Storm Sewer System (MS4) mapping requirements.

- Working with the East Stroudsburg Borough on the implementation of their Comprehensive Plans.
- Facilitating an update to the regional comprehensive plan for Hamilton, Stroud, and Pocono Townships and Stroudsburg Borough.
- Leadership roles with the North East Section of the PA Planning Association and Northeast PA Metropolitan Planning Organization

### **2 Hire a professional planner who will work with the county and with the Pocono Mountains Economic Development Corporation (PMEDC) to develop a comprehensive plan**

### **3 Develop a long term, comprehensive infrastructure plan**

The current Monroe County Comprehensive Plan was developed in December 2014 followed by the Monroe County Economic Development Implementation Plan adopted in January 2015. These planning documents outline goals and action items directed at improving the economic climate in Monroe County — including the recommendation to address water and sewage infrastructure.

As a first step, in January 2018, the County Commissioners established the *Monroe County Infrastructure Identification Program* and hired KRB Consulting Services, LLC to work with the Monroe County Planning Commission in the development of a Sewer and Water Infrastructure Plan.

The Monroe County Commissioners recognize that successful implementation of the goals and actions outlined in the Infrastructure Plan will depend on the collection, analysis, representation, and use of critical geospatial information. A coordinated infrastructure data strategy is also needed to facilitate economic development and environmental stewardship, and to increase the quality of life in Monroe County as it advances into the twenty-first century.

The Pocono Mountains Economic Development Corporation is developing a Strategic Plan addressing business attraction and retention and opportunities that will support family and community sustaining employment.

### **Workforce Development Task Force**

The Workforce Development Task Force continued its efforts to address the need for a cohesive plan that aligns the county's educational system with workforce demands and employer expectations. The Task Force is reviewing nationally recognized education models that have effectively aligned education and workforce needs with 21st century career expectations.

### **Small Business and Entrepreneurship Task Force**

The Small Business and Entrepreneurship Task Force launched its How to Do Business Guide for Monroe County. The Guide provides information on starting, sustaining and expanding a

business in Monroe County and can be accessed at <https://monroepabusiness.org/>. The Task Force also developed a Permitting Checklist to help developers navigate through the zoning process in the County's municipalities and townships.

*The Marketing Committee* continued to promote Business Consulting and Counseling Services in collaboration with the University of Scranton Small Business Development Center (SBDC) and the SCORE Association. Monthly counseling continued at four locations throughout the year: East Stroudsburg University, Northampton Community College, Western Pocono Community Library and Tobyhanna Township Government Center. A total of 21 companies have been advised since the start of the service in 2016.

*The Business Development and Retention Committee* has been working on strategies to help existing businesses in Monroe County stay alive and thrive. Their efforts include initiatives to attract businesses and create an entrepreneurial business culture in the county. Committee members are working with the United Way of Monroe County in its efforts to establish a Community Kitchen to address food insecurity and they are actively engaged in recruiting volunteers for the September 29, 2018 Pick Up the Poconos – Monroe event.

*The Youth Entrepreneurship Committee* established the Monroe 2030 Junior Board in an effort to expand community and entrepreneurial engagement. Participation is open to current high school sophomore and junior students from: Stroudsburg, East Stroudsburg South, East Stroudsburg North, Pocono Mountain East, Pocono Mountain West, Pleasant Valley, and Notre Dame. Junior Board members will have many opportunities for Leadership, Innovation and Entrepreneur skill development. Additionally, the Future Business Leaders of America (FBLA) Region 21 Leadership Workshop was co-sponsored by Monroe 2030 and held at East Stroudsburg University in October 2017. FBLA participants competed in the Made in the Poconos Competition with East Stroudsburg South winning first place.

Additionally, the Monroe 2030 Action Team sponsored a BIZ Skill\$ Workshop for individuals who want to start a business or need business support. The event was co-sponsored in collaboration with East Stroudsburg University, Pocono Alliance, the Pocono Mountains Economic Development Corporation, Wells Fargo, and Aetna Better Health. More than 70 individuals participated in the workshop that introduced them to financing and business networking opportunities.

The Monroe 2030 Executive Team appreciates the commitment from the County Commissioners to move forward with three economic initiatives and encourages them to adopt the remaining initiatives to continue the economic transformation of Monroe County. The Executive Team also extends its appreciation to the many municipal and township supervisors and community volunteers who have invested their time and talents into the Monroe 2030 initiative. The "Call to Action" continues!

## Monroe 2030 Action Team 2018

### Executive Committee

Matthew J. Connell (Chair)  
Dean, Monroe Campus,  
Northampton Community College

Edward Cramer  
Supervisor, Stroud Township

Sharon Laverdure  
Former Superintendent,  
East Stroudsburg Schools

Charles Leonard  
Executive Director,  
Pocono Mountains Economic  
Development Corporation

John Moyer, Chair  
Monroe County Commissioners

Christine Meinhart-Fritz  
Director, Monroe County  
Planning Commission

Richard Mutchler  
President, BioSpectra

Gary Olson  
President/CEO, ESSA Bank & Trust

Mary Frances Postupack  
Vice President Economic  
Development and Entrepreneurship,  
East Stroudsburg University

Adam Schellhammer  
Executive Director, Monroe County  
Conservation District

Michael Tukeva  
Executive Director, Pocono Alliance

Marcia G. Welsh  
President, East Stroudsburg  
University

### Workforce Development Task Force

Michael Albert

William Bajor

John Casella

Merlyn Clarke

Cosmas Curry

Joshua De La Mata

Nitza Desire

Thomas Grayuski

Sharon Laverdure – Chair

Chuck Leonard

Sherry Rex

Rich Schlameuss

Don Seiple

Greg Sherill

James Smith

Dennis Virga

Claudette Williams

### Small Business and Entrepreneurship Task Force

Chris Barrett

Dillan Buckelew

Denise Burdge

Valerie Case

John DeCusatis

Joshua De La Mata

Stephanie Fairbanks

John Holahan

Lisa Hutchins

Patrick Kelley

Richard John

Chuck Leonard

Pat Lincoln

Robert Lovenheim

Leigh Magnotta

Christine Meinhart-Fritz

Cheryl Milson

Connie Merwine

Keith Modzelewski

Nicole Murray

Troy Nauman

Amy Polmounter

Mary Frances Postupack – Chair

George Roberts

Adam Schellhammer

Debbie Smith

Jennifer Strauch

Zech Strauser

Shawn Walsh

Christine Wilkins

Phil Williams

Sonia Wolbert

# Monroe 2030 Action Team **BUSINESS SUPPORT SERVICES**

PROVIDED BY



**Small Business Development Center  
The University of Scranton**  
*Helping businesses start, grow, and prosper.*

AND



**Northeast Pennsylvania**

Free Business Consulting Services for startup and existing businesses will be provided on the **second Thursday of each month** from September 2018 through August 2019 at the following locations:

## **Western Pocono Community Library**

[wpcl.lib.pa.us/](http://wpcl.lib.pa.us/)  
131 Pilgrim Way, Brodheadsville, PA 18322  
570-992-7934

**September 13, 2018** from 9 a.m.-12 p.m.

**January 10, 2019** from 9 a.m.-12 p.m.

**May 9, 2019** from 9 a.m.-12 p.m.



## **East Stroudsburg University Innovation Center**

[esu.edu/red/](http://esu.edu/red/)  
562 Independence Rd, East Stroudsburg, PA 18301  
570-422-7920

**October 11, 2018** from 9 a.m.-12 p.m.

**February 14, 2019** from 9 a.m.-12 p.m.

**June 13, 2019** from 9 a.m.-12 p.m.



## **Barrett Paradise Friendly Library**

[barrettlibrary.org](http://barrettlibrary.org)  
6500 Route 191  
Cresco, PA 18326  
570 595-7171

**November 8, 2018** from 9 a.m.-12 p.m.

**March 14, 2019** from 9 a.m.-12 p.m.

**July 11, 2019** from 9 a.m.-12 p.m.



## **Northampton Community College, Monroe Campus**

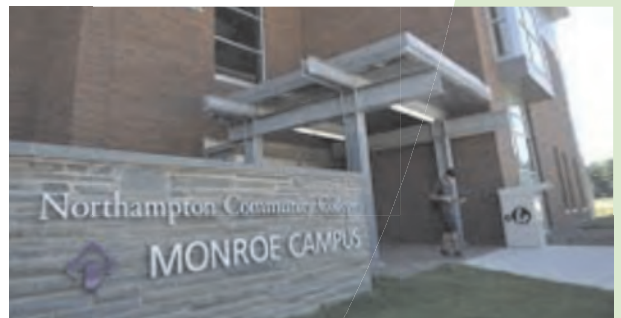
[northampton.edu/monroe-campus.htm](http://northampton.edu/monroe-campus.htm)  
2411 PA-715, Tannersville, PA 18372

*Exact location TBA*

**December 13, 2018** from 9 a.m.-12 p.m.

**April 11, 2019** from 9 a.m.-12 p.m.

**August 8, 2019** from 9 a.m.-12 p.m.



**Schedule an appointment for FREE Business Consulting Services today.**

The University of Scranton Small Business Development Center • [scrantonsbdc.com](http://scrantonsbdc.com)

**Leigh Fennie, Business Consultant, 570-941-4152 or [Leigh.Fennie@Scranton.edu](mailto:Leigh.Fennie@Scranton.edu) • [scrantonsbdc.com](http://scrantonsbdc.com)**

*Monroe 2030 – Assuring a Prosperous Monroe County!*

# SPECIAL THANKS TO OUR GENEROUS SPONSORS



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**PATTABIRAMAN NEELAKANTAN, PH.D.** professor of political science and economics

Special thanks to the ESU Office of University Relations

For more information about the Monroe County Economic Scorecard or the East Stroudsburg University Economic Outlook Summit, please contact ESU Economic Development and Entrepreneurship at 570-422-7920.

