Oral History Interview_Teri Ooms
March 11, 2026
Participating: Paul Adams, Chris Breiseth, Tim Gilmour, and Teri Ooms

Christopher Breiseth (CB): At the very last minute, I discovered that Governor Casey had put up the Industrial Resource Centers, the IRCs, and it included a collaborative model. So he and I put together a plan. He did most of it, but I gave him encouragement. We called Scranton within a day before the submissions ended, and we said, "We're defining a collaborative effort between the two of our institutions," and they couldn't say no. So that was what got funded, and then it was headed by someone who had been my bête noire at Wilkes. He ran it until he died suddenly, I think from a heart attack. So I had a foot in the door of bringing the college presidents together, not only in the Wilkes-Barre area, where I spent a lot of time on the Council of Presidents, but also expanded it to include the University of Scranton, Marywood, and others. And it was in that context that NEPIRC (Northeastern Pennsylvania Industrial Resource Center) got started. So that's a little bit of who I am and where I am right now. We've had over fifty of these interviews, and they've really been remarkable in filling in on the human character of Wilkes. I think the presidents who stayed together on this project have a love for the place that is kind of unusual. Particularly at the point that you've left the institution, you don't feel so connected to it, but we do. So that's a little bit about me, and I'm really eager to learn about you.

Teri Ooms (TO): Well, Tim left out a lot of good details when he was telling me stories about you. You have quite an impressive background and history, and knowing that you were behind some of those things, like NEPIRC and the Earth Conservancy, is huge. I look forward to reading your book.

Tim Gilmour (TG): Chris has set it up beautifully. This is a very informal thing, and you can choose how you want to do it. We're really just interested in having you share how you got to be in a position to come to The Institute when you did, and then focus as much as anything on The Institute experience. These histories have been very candid, so you can be as candid as you want to on this. You'll get a transcript of this pretty rapidly, and what we want you to do is to feel free to change, add, or subtract anything you feel you need to. This is as accurate a record as possible of what you have to say from your perspective about the history of Wilkes. We may ask you a question or two, but it's probably best for you to talk about your background and history. I will just say, before you start, that when we were originating The Institute, I was really fortunate to have the opportunity to choose Terri to head it. A year or two ago, it celebrated its twentieth anniversary, and I don't know if any of us involved in its inception envisioned twenty years, but it's continuing to go on. I think it does fill a big place in Northeastern Pennsylvania, but now its mission has actually spread geographically beyond that. And with that, I'll turn it over to you, Terri.

(TO): So, back in 2003, I was serving as the president and CEO of the Inland Empire Economic

Partnership. It's an economic development corporation in Southern California, covering Riverside and San Bernardino counties. I had spent most of my professional career on the West Coast, however, I was born and raised here in Northeastern PA. I was contacted by a headhunter, who Tim and Wilkes had been working with, trying to find a person to start this new entity under the Wilkes umbrella called the Joint Urban Studies Center. At the time, I was coming home to visit family for the holidays, and trying to bring my family back east, so I had the opportunity to meet with the headhunter. They then set me up with an individual meeting with Tim, and I'm very grateful that he still hired me after that individual meeting, because it was on Christmas Eve, and I got lost going from Scranton to Wilkes-Barre! I kept going over the bridge to Kingston with all the one-way streets. I couldn't figure anything out. But it was honestly that meeting with Tim, about coming back here to start this research institute, that made me want the job. In Southern California, the primary mission of the partnership that I worked for was a very broad and innovative definition of economic development. We did the traditional things like marketing and site selection services, but we also had a film commission, a tourism commission, a small business program, a workforce program, a tech program, and a very extensive legislative advocacy program. Those were all under one umbrella serving those two counties I mentioned, plus the fifty-three incorporated cities within the counties. It was a great regional effort that yielded incredible results, like the creation of 10,000 new jobs in one year. We had started a 501c3 nonprofit foundation about three years before I left, whose focus was on creating research and information to support economic development, as well as all of the other activities that were being done in the community. The research component was very similar, and I found through that endeavor that I really enjoyed that aspect of the work, which was another reason why I was excited to do this at Wilkes. In early 2024, I came back out for a two and a half day interview with Tim, several business leaders from the area, and several higher education leaders. It was a very formidable group. I met Bill Sordoni Sr., Gene Roth, Susan Shoval, Father O'Hara from King's, and Mike McDonald from Misericordia. We spent a lot of time together over those two and a half days, and I was eventually offered the position. I, of course, accepted the position and started trying to figure out what the expectations were and what we needed to do to kickstart everything off. The university, as well as all of those other members on that hiring committee, determined that they wanted a person with work experience who was doing the economic and community development work in the field, as opposed to a faculty member. I was able to take a lot of what I learned in actual implementation and help begin to lay the foundation of the research component. Tim and the group gave me a lot of flexibility because, of course, I immediately challenged a whole bunch of things. One thing in particular that I mentioned was that working to reinvigorate and sustain the city of Wilkes-Barre wasn't going to be successful long-term unless we took a regional approach, because the economies of the counties were quite economically interdependent. We needed to think bigger. At that point, we were able to talk to higher education institutions in the neighboring Lackawanna County, and got them to join this collaborative effort. We had a great advisory board that consisted of all of the chancellors, presidents, and CEOs of all of the schools, as well as those business leaders and a few others who had very strong regional businesses. It was a little rough of a start, but we started getting some research products out the door. I say a rough start, because in the very beginning, other community organizations felt as though we were trying to swim in their lane. There were also things being said like, “Why is somebody new coming in from outside the area? They don't know anything." So that was a challenge. And then the folks in Wilkes-Barre were like, "She came from California, but she was born and raised in Scranton. Why is she here? We like our own," and the people in Scranton were saying, "She's a traitor. She's actually working in Wilkes-Barre. We don't want her either!" So it was a little bit of a challenge breaking through on the community side.

(CB): The valley!

(TO): Yep! I had incredible support from that leadership group that Tim formed, which became the advisory board, as well as the senior leadership within Wilkes, but it broke down the lower you went in the ranks of the university. The faculty did not like the concept of this organization or me, because it wasn't faculty-run, and I didn't have a PhD. Staff thought we were taking university money, being treated differently, and that I had an open door to Tim. So the staff didn't like us either. There were some challenges of fitting in within the higher education infrastructure that permeated for a while, but we got through it, and we started producing work. We started creating a name for the Joint Urban Study Center that people equated with data, information, and analytics. We held our first regional community event in 2006, just two short years after being formed, and that event really cemented our role in the community. We had about eighty people, and there was a venue in Pittston at the time. It was right in the middle, so people barely needed to cross the county line. So that was where we presented our work. At that time, I want to say we had about eighty different community-level metrics trended over time. We talked about visioning and goal setting, we got people to volunteer to sit on task forces and research, and got the community engaged in carrying the message to decision makers in those respective areas. So we started to grow from there. We kept putting information out the door to build relationships and try to help different organizations. I think it was right around 2008 when there was a recognition that we were definitely a needed entity, because data analytics and this type of research and applied work were really affiliated with institutions in what I'll call "NFL cities". It was not as common in small cities across Northeastern Pennsylvania, so people saw the value in that, and it progressed over time. In the beginning, data wasn't Hollywood. It wasn't this glitzy, sexy thing. People were used to the traditional ways of doing business and making decisions by the seat of their pants. Then, in 2008, we changed our economic model. Instead of relying totally on requests for underwriting, sponsorships, and things like that, we created a fee-based model. We would do data analytics and primary research gathering for individual entities, whether they needed a needs assessment, a strategic plan, or just general survey work done. So we started to build more revenue, and we still have more revenue coming in from fee-based work than we do from the contributions. Being affiliated with higher education like Wilkes, at the lead, was very instrumental to our organization in kickstarting it. We immediately had credibility in having a relationship with higher education, so that made a difference in us being accepted and also being effective. In 2010, we changed our name because we got way too many questions on what Urban Studies actually is, and if you're covering Northeastern Pennsylvania, there's a lot more than the urban core. So we came up with The Institute for Public Policy and Economic Development. It's a rather long name, and people got it backwards or used the wrong prepositions, but it worked, and we continued to grow and develop as an organization. We also started the acknowledgement that the regions were beginning to shift. For example, for purposes of the labor shed, there was a connection to Wayne County, Wyoming County, and even Schuylkill County, so we started expanding our community-based research. We started adding our network of issue-based task forces, and we now have eight with about one hundred volunteers in total. Our community-based work is always focused in Northeastern Pennsylvania, and we've expanded the counties beyond Lackawanna and Luzerne, but overall, our client work is really anywhere. We've serviced clients in around fifteen states so far, doing a variety of projects. We've also worked for the federal and state governments and a variety of nonprofits. It has all worked out really well, and we continue to grow and gain strength. From day one, we were self-sufficient, aside from the in-kind services of human resources, accounting, and IT. We generated all our own revenue, and all of our expenses were paid from that revenue. There was no other university money involved. All of the schools that became partners, and we're fourteen strong now, contributed $2,000 a year to be academic partners, and then that has since increased to $2,500. What that means is they get their name listed on everything, the presidents get to be part of the advisory board, and we work with any of their students who have won an official research practicum, for academic credit or not. So that continues to this day. Then Tim blew it, because he retired! Then COVID hit, of course, and that changed a lot of things. Luckily, we were mobile to begin with. We all had laptops and were used to working at our clients' locations, our second office in Scranton, or at home. We never lost a beat during that time, and we created a whole series of Institute insights on COVID’s impact on different sectors. So we really grew our audience at that point, and it was very significant. What we found out, however, was that because we were under Wilkes, we were not eligible for any of the pandemic-type funds that were out there. We tried for certain grants, but again, because we were under the umbrella of a 501c3, we weren't eligible for certain types of grants. It was the private sector folks who had really been involved almost since the beginning who said that the objective was always to spin off the university, and it was really time to do that then. So in 2022, we became our own 501c3, but we still kept the collaborative structure in place. We still have academic partnerships with all fourteen higher education institutions, and all of the presidents and chancellors still sit on our advisory board. We also still work with students. Nothing has really changed in that regard except for our legal status. In that first year, we actually hit a million dollars in revenue between our donations and our fee-based work. That opened a lot of doors for us, and we were told that, “You're a little more objective now, because you're independent. You're not just tied to one university,” so I guess I didn't do a good job of selling that independence in the past! But we're still doing a little over a million dollars a year. We now have nine folks on the team, including four analysts and one GIS specialist. There’s also a marketing and communications person who does all of our website work, which is absolutely great because I really stunk at that, and an admin coordinator who runs our student intern program. We get about eighteen to twenty students a year, which includes juniors, seniors, and grad students. Then finally there's Jill and me. I'd say the only thing that we did not do well as an organization was catalyze faculty. We were really good with the students and never had a problem getting interns. We've actually hired a couple of interns over the course of our years who have moved on to other things. But it was always a challenge with the faculty. As I mentioned, we had several challenges at Wilkes, and some of the other schools were about 50-50. We had some great faculty from Penn State Wilkes-Barre and King's who we worked with. We tried doing a very eclectic faculty research symposium, and in our heyday, we were up to about thirty-two research submissions. At one point, I made it to a two-day event, because even with breaking it out into concurrent sessions, we couldn't handle everything in one day. Most of the faculty was not from Wilkes, so there was still that challenge in getting them engaged. We stopped it because Pat Leahy said that we shouldn't be wasting our time with faculty, and that we should be doing community work and focusing on students. So we had our last faculty research symposium in, I think, 2018, and we were never successful at getting faculty engaged in our research. We tried getting them involved with some of our client things, but timing just always seemed to be an issue. We also tried community-based work and getting guest authors of articles into our economy tracker. We even offered to pay stipends for a five-hundred-word article, but overall, we were not good at that. But truth be told, if it weren't for Tim's leadership and his vision, we wouldn't exist today. If you go to our website and look at our annual reports, you'll see some incredible outcomes from organizations that have used our data to get millions of dollars in grants. Others have implemented recommendations from our needs assessments and strategic plans. We have really been impactful for the clients who we serve, and that's why we keep coming back. It was all because of Tim's leadership, putting together this collaboration, and his vision of what could be that got us here now, so thank you, Tim.

(TG): Teri's always been entirely too self-effacing. She took a very broad concept and ran with it, as you can tell, beautifully. I have a couple of things you might want to talk about, Teri. One was baking cookies for Bill Sordoni and his talks on the sofa, because I think it's very important. Bill was as important to The Institute as I was.

(TO): Very true. Bill was on my hiring committee, and when we formed the advisory board, Tim was the official chair while Bill was the vice chair. He and I clicked, and we worked really well together. Bill really took an interest in our work, to the point where, for one of the first two studies that we were publishing, he picked out the cover photo. The study was called "Why Aren't We Average?" It was about the city of Wilkes-Barre and the fact that we really didn't meet median benchmarks for a number of economic, social, and demographic metrics. So Bill was very involved. He was also behind the idea of creating our quarterly newsletter called *The Economy Tracker*, and then, when we hit the recession after the housing bubble around 2008, he said, "We're going to change the name, and it's going to be *The Recession Tracker*. We'll go back to *The Economy Tracker* when it's right." So he was very involved in our work.

(CB): Was AJ (Andrew J. Sordoni) interested?

(TO): Oh, yes. Not as much as Bill, but he was very interested, and Andy, to this day, holds me accountable for people who don't follow the recommendations from our reports. He still reads everything we publish cover to cover, and I either get phone calls or emails with a list of questions from him on a regular basis.

(CB): That is high praise!

(TO): Yes! He's very sweet, and Bill was very sweet. He often told me that our annual indicators, once he retired, were the only community event he still attended. He was going to stay on board after Tim retired, but then he decided it would be best to just “rip the band-aid off”, as he said, and just retire at the same time as Tim. I was pretty upset with the two of them for a while! So he resigned from the advisory board, but I still had a standing bi-weekly meeting with him every Monday morning at 8:30. He and Andy bought this building on Wyoming Avenue, which was their secret office, but to be honest with you, I think they just played cards and gossiped. But anyway, he had this leather couch in there. I always had the right corner of the leather couch, and he would sit across from me in this antique high-back chair. It was six inches higher than the couch, so he would always be looking down at whoever was sitting down there. When I would go in, I had to bring homemade cookies, and I became very well-versed in the cookie likes and dislikes of Bill Sordoni! We would have a talk, he would advise me, and then he eventually said, “We're friends now, so we can gossip about people.” He would tell me about the nicknames he came up with for people, different funny stories, and things like that. Then, when I left the office, I'd stand in the parking lot for a minute and go, “Okay, was that good or bad?” I told that to his sons after he passed. I said, “Sometimes I left the meetings, and I didn't know if he built me up, took me down, or did both at the same time. I couldn't figure out where I stood,” and they said, “Welcome to our world!” But Bill was definitely behind a lot of our growth and direction. He was a very good strategic advisor, and he became a good friend. His loss was very, very difficult to swallow. I still think of it every spring, because I know exactly when it happened and what was going on. Even when he couldn't talk, his kids still called me, because they knew we had such a tight relationship, which was very thoughtful of them. But needless to say, between Tim and Bill, I learned a lot.

(TG): I think we need to be clear, Bill was always in the background, willing to write a check when it was needed, and I think we all know that Bill was very selective in his gifting. Not that he wasn't extraordinarily generous, but the reason that The Institute became a self-sustaining entity was because Bill insisted that it do so.

(TO): Yeah, and he did put a lot of money in during the years. He would challenge Andy to match him. Once a year, I would have to go to lunch with the two of them, and then that's when Andy would start hitting me with all sorts of questions. After about two and a half hours, Bill would go to Andy, “Okay, you did it enough. She handled it well. We’re letting her go, and you're writing the check!” So it worked out well, and Bill’s kids have since been equally as generous in supporting our organization since his passing.

(TG): I'm not sure I was as aware of that as I should have been. That's wonderful news. This was before Teri's time, but the initial gift that we got was from Bill Montag. He was an alum on our board at the time, and not to drag this out, but I had come up with a fairly quick strategic plan for Wilkes. I was presenting it to all the board members individually to get their input, and Bill, who lived in Buffalo at the time, was in town. He came over and had breakfast with me, and he said that he was impressed with my strategic plan, but he said, “I've been walking a little bit around Wilkes-Barre, and if you don't fix the city, you're not going to fix the university. If you need some help on that, I might be able to help.”

(CB): That was always his position, as I knew him. The two were absolutely connected together, and if you didn't help Wilkes-Barre, Wilkes University was going to have a rough time.

(TG): Bill Montag was a wonderful guy, and his family gave around $300,000 for the initiation of The Institute.

(TO): And then Tim went out and raised the remainder of the money. I think we ended up with around a $400,000 budget for the first few years, and that was the kickoff of it. It made it easy for me when I was coming through the door to focus on mission, operations, and delivery, because I didn't need to be worried about fundraising in the beginning.

(TG): Bill Montag stuck with The Institute, but we were not able to get any more resources from him. I think his family had competing priorities that led him not to be able to do that anymore. I think around 2010 is when things began to fade a little.

(TO): We kept him on the mailing list so that he would get everything, but I want to say it was right around the time when you retired, Tim, that his email started bouncing. I don't know if he changed his email or just blocked them, but we haven't been in contact with him at all.

(CB): Paul, do you know if he is still alive?

Paul Adams (PA): I don't know. I was just looking on the internet to see what the story is.

(TO): I've actually never met him face-to-face. I only talked with him on the phone.

(TG): Bill Montag was extraordinarily successful. He had gone to work for a company. Teri, you're going to have to help me with the name of it.

(TO): It was up in New York State. They're the ones who developed the E-ZPass.

(TG): Well, anyways, they had started out, and they made their first big money on building temporary housing after the flood in '72. He went in as, I think, an accountant, but he ended up being CEO of the company. They were enormously successful, of course, because they did this E-ZPass thing, which became a national program. Then the company was bought out by a Scandinavian company. That relationship afterwards did not work out, and I think he left them not long after they were bought.

(CB): My sense is that they lost a lot of money, in terms of business, in the period long after I left. I don't know where in my mind I got that from, but I have a sense of sadness, because Bill and I spent a lot of time together. I went out to Buffalo several times and was always greeted royally by both him and his wife. They really loved Wilkes-Barre, and they had a sense of how bad of shape it was in. He was trying to figure out what he could do from that distance to stimulate it. We were working on ideas, so I'm thrilled that The Institute came into being and was so effective in carrying out that dream of his. Buffalo and Wilkes-Barre were not well-developed. As a historian coming to Pennsylvania from Southern California, it struck me that

Wilkes-Barre and Scranton had a great deal of similarity with Erie and Buffalo, but there was virtually no communication. They were ethnically similar and had great days back in the late 19th and early 20th centuries. But given the way Pennsylvania is divided topographically and the way the transportation shift collapsed in terms of railroads, we barely knew each other. I had a couple of events in Erie and Buffalo, and I thought, "My God, we're so alike." So I'm intrigued by Bill, because he was one who was reaching beyond that dividing line which seemed to cut off Upper Western Pennsylvania and Southern New York from our Northeastern Pennsylvania.

(TG): So The Institute had that inception, and then I tried to attract Bill to the concept. With his feeling that the crying need was that we didn't have good data to base anything on, that's what Teri began to work on almost immediately. For the early years, I think Bill was very respectful, but he really became an animating force. And then we had not only the President's Committee, but we also had the Executive Committee. I also want to mention one other thing. To get the money from Bill Montag, it was recommended to me that we get Bob Capin involved, because Bill thought that Bob hung the moon. I guess he's had him as an instructor. Bill didn't want to come down. At that point, in 2002, he was doing two-way video, and that was pretty rare. We had the capability to do that in our TV studios. So all of that was a lot of fun. Bob came in very much wanting to help, and did indeed help, but he was also wondering what we were trying to do! So a little bit of that came out in this discussion with Bill Montag, but as you can imagine, Chris, Bill got it right away. At that point, it didn't have the data orientation that Bill Sordoni got us into, but he understood that this was going to help him in economic development. But Bob Capin was very effective, and so we need to credit some of the first $300,000 as being raised by Bob Capin. That was fun.

(CB): There were several alums who Bob Capin was the sky for. Without him, they never would have made the successes that they made. In my own fundraising, I was aware that those folks were crucial in how I dealt with Bob. That was delicate, because how I dealt with that was going to have a big impact. I was finding ways that these people could invest in ways that brought honor to Bob Capin.

(TG): Yeah, he sure deserved it.

(CB): He did deserve it. [redacted] It involved our chairman of the board, who died of cancer. Who was that?

(TG): Jack Miller?

(CB): Yes, he was one who was really important. He then went on to do some great things in Harrisburg, and he became the head investigator.

(TG): We've talked a little bit about Jack Miller, I think, but he had an extraordinary career. I think he was actually with KPMG, or a predecessor organization, at the time he was doing the Pennsylvania work. At one point, he was up for Comptroller of the Currency, and when he retired, he had been a vice chair of the governmental, educational, and healthcare portions of KPMG's practice. He was really exceptional, and he was a great chair.

(CB): I've got one more diversion. My daughter works with English language learners, and she does it from Arlington, Virginia. She was on a webinar earlier this week and discovered a man who's a principal in the Lehigh Valley who is doing extraordinarily significant things with immigrant kids. He's a Wilkes alum, and he volunteered that information immediately after she said she was from Pennsylvania. She told him my typical story of getting people to say Wilkes when they are asked where they went to college. I always say, “Put your chin up and say you went to Wilkes!” Well, he did that without her asking. Anyway, I've asked her to give me his telephone number. We might want to interview him as an alum who's in the trenches right now.

(PA): Do you know his name, Chris, or not?

(CB): It's something like Stoth. She's going to send it to me, so it’ll be in the email.

(TG): That'd be fun. Well, Teri, getting back to your story, I don't know where you want to re-enter this.

(CB): Can I ask one question? Coming from Riverside and the enormous growth that’s going on out there, what was it like to take on Northeastern Pennsylvania?

(TO): You know, ironically, I saw some similarities, which is why I thought some of the things that we did out there would work in Northeastern Pennsylvania. Prior to that enormous growth, there were many things that were very similar. There was distressed unemployment, we had people leaving the area to go to work in those high demand coastal communities, and sometimes we'd even lose population as they picked up and decided to move there for a long period of time. The economies of Riverside and San Bernardino County were both intertwined between. People didn't see that jurisdictional boundary. They went where they needed to go in and around the region, and it was always us two against LA and Orange County. When I came here, I saw the similarities between the two areas. There were similar economic markers, an opportunity to grow the logistics and warehousing industry, and an excellent transportation infrastructure. There was also that feeling of, “Philadelphia and Pittsburgh get everything, and we get nothing.” So there was that underdog fight here as well. I saw a lot of similarities, which is why I thought some of the strategies we implemented out there to turn the region around would work here, and to some degree, it did. The biggest challenge, and I still fight it to a major degree now, is that out in California, in a three-year period, we were able to get communities to sit around the table and actually work together. Here, it's still a struggle. Luckily, I think we've made some headway with the two counties. We're going to be coming out with a paper that they want to use to help them regionalize public transit. That'll be debuted in May. But the individual smaller communities are still at odds with each other. They don't want to work together for fear of loss of power and control. They fail to recognize that things beyond boundaries still affect their communities. We have seen some very positive outcomes with the larger cities, like Scranton, Wilkes-Barre, and Pittston, but we haven't been able to get the smaller communities on board and to realize that the decisions they're making, in terms of land use and planning, are really impacting the quality of life and the ability to grow the housing market. So it's somewhat of a challenge still, and that's after twenty years!

(CB): What's the role now of the press?

(TO): Well, things have changed dramatically. The local newspapers like the Scranton Times, Wilkes-Barre’s Citizens’ Voice, and Hazleton’s Standard Speaker were owned by a family, but they've now been sold to the big private equities and hedge funds. We're starting to see limited local news, the national news comes a day late, and they really shrank the staffing. The only benefit, however, is that we are seeing more regional stories in each of the three papers. Everything is behind, so a lot of people don't see value in the daily newspaper anymore.

(CB): If you read my book, I have a section about when I first arrived, how I was dealing with the impact of the newspaper strike in 1978. The Citizens’ Voice was developed by the union people. That it survived is still remarkable. I had a meeting with Rich Connor, who was head of the Times Leader. He attacked me for what I had said to a parent during a breakfast that was being hosted. I got his side of the strike very early. I tell it in the book that Wilkes-Barre is still a town with two newspapers. When I came, it was three, because the Sunday Independent was still a very impactful gossip-like local paper for people. So the newspaper part of Northeast Pennsylvania is really fascinating. When the family company in Scranton bought into the Citizens’ Voice, it was, politically, a major move towards regionalization. Unfortunately, people didn't think of it that way. They thought this was the enemy moving in. I had one situation where a priest in Scranton was coming down for a symposium at Wilkes. He was a native of Scranton, and when he called me, he asked, “How do I get there from here?” I had to literally take him down I-81. He'd never been to Wilkes-Barre! The parochialism in the area is indigenous, and of course, the coal companies kept these towns divided to conquer them. Overcoming this has taken a century. But what you are doing is so valuable, and I am so impressed! This has been one of the most educational interviews of ours.

(TO): Thank you, I appreciate that.

(PA): I was going to ask a question. As you think about your legacy with The Institute, what are the findings that you're most proud of and that you think have had the biggest impact on the region?

(TO): Well, there are a couple. One is the annual indicators report we do. We have a task force and community-based research projects. We now have a following of people who look for that information in the report. They base their company decisions off it and even use it for grant writing, so getting people to see the value of informed decision-making, I think, was huge. We've also done some things in our community health work, where new programs were created. For example, in the initial regional community health needs assessment we did, we identified psychiatry as truly lacking in the region, but demand for those services was there. We needed to address that, and both the medical school and the Wright Center for Graduate Medical Education started programs to create behavioral health professionals who then went on to do a psychiatry fellowship in their residencies. So that was pretty huge. The other thing that came out of that is we talked about the need for transportation and how it was impacting healthcare. Not only our senior population, but also about 9% of those under the age of sixty-five do not have access to a vehicle, so things like doctor's appointments, lab tests, physical therapy, or even picking up a prescription regularly were missed as a result. That was, of course, impacting their health and quality of life, but it was also causing broader public health implications. As a result of that, Geisinger adopted a transit program where all patients who met a certain income threshold or age requirement were assigned a community health worker who was then in charge of coordinating transportation to ensure that the patient didn't miss appointments. That was pretty big. We've had pieces of legislation passed here and there that we recommended as public policy solutions to some community-based problems, so I also consider those as wins. We work very closely with the foundation community, who determine their strategic priorities based on our annual data, so that money is donated to organizations that address specific community issues. So I think there's satisfaction in changing the mindset, and there have been some real apparent successes in people using the data to make positive change.

(PA): Since you mentioned transportation, is there any progress on the train from Scranton to Hoboken yet?

(TO): Yes, there has been! It's definitive. The money's been allocated. There's some infrastructure that needs to be finished. I think there’s a ten-mile stretch where there's a challenge with the rail, but the money has been allocated to fix it. They're supposed to start construction soon, and I believe the horizon is two to three years before we have a train moving from Scranton to New York City. Now, it's not going to be the end-all, be-all that everybody thinks in moving workers back and forth, because the plan with the stops is a three-hour, one-way trip. I don't think we're going to see a lot of workers using it, but what it does do is help to enhance our visitor market. It does create opportunities for business, but not necessarily employment. So that's why one of the significant things that we're working on now, related to transportation, is the consolidation of public transit in Lackawanna and Luzerne County. Once you get to that train station in Lackawanna, you need to be able to move. We need to have a more nimble public transit system, because not everybody's going to Uber or Lyft, and we don't really have a strong Uber and Lyft market anyways. And not everybody's going to be able to rent cars, because the nearest car rental place is at the airport, which is twelve miles away. So we need to have a stronger public transit infrastructure that can move people within the communities and over the wall into Luzerne County to all of the amenities there as well. So that's our next big thing.

(PA): Oh, good.

(TG): You’ve obviously done a lot of thinking about that. So what are you doing after you fade out of The Institute?

(TO): I have no clue. I've already had a job office offer, which I've tried to politely turn down. I said that I need to get through the next two years and make sure that the people and organization are ready and strong. Jill has what she needs, so I'm going to take this reduction in hours to try to figure out who I am. I spent over twenty years at The Institute and another fifteen years before that being an IEP. I’ve also been Tim and Doug's mom and Phil's wife, so somewhere along the line, I lost myself. So I need to kind of date myself and figure that out now!

(TG): Well, just know we're all rooting for it.

(CB): Good luck. That's a worthy objective!

(TO): Thank you. I'm actually looking forward to it. I’ve been trying some new things and some old things I used to do to see if I still like them. I haven't been golfing in a while. I just don't have the answers yet.

(CB): Your belief in data as the basis on which good thinking has to be based on, in terms of public policy, is so fundamental. And as we go into the new world after Trump, in what I’m calling a second reconstruction, we need to focus on rebuilding the government.

(TO): We're going to need to survive Trump first!

(CB): Well, I can't deal with that part of it. In my longer vision, I can see the end, but I’m struggling since I have such a short horizon. But data needs to be crucial to that reconstruction. Frances Perkins was important to me. I lived with her and spent a lot of time studying with her. She was a social scientist. I mean, Social Security, unemployment, and all of those things that she brought to the New Deal were based on scientific study of what was needed and what would work with different populations. I think there's a nonpartisan dimension to our public analysis through the use of good data.

(TO): Yeah, but you said it, Chris. Good data. I think our biggest concern is whether the data is being manipulated. Is it still good data? That's what we don't know, but it's the only thing we have to work with. That has also been a struggle.

(CB): And we're in a period of manipulative data to the nth degree. When I talk about the second reconstruction, I really think there have to be things done right at the fundamental level to reconstruct this country. The New Deal spirit needs to be there, but what the New Deal did is not what we just have to automatically project into the future. I think for an area like Northeastern Pennsylvania, that's an opportunity to think through what makes the most sense. One of the things that has dogged the area has been these multiple political jurisdictions and school districts. When I was there, there were thirteen school districts alone in Luzerne.

(TO): You, being from Southern California, know that there's one school district per county. There's supposed to be sixty-seven superintendents, not five hundred sixty-seven superintendents. I did open my mouth on that one and put together a little paper about that, but it did not go over really well! It was more or less predicated from the fact that not only would there just be efficiencies in operations, but it would also improve equity. If real estate taxes are still going to be the fundamental source of public school funding, then we're saying that by having all of these school districts, a kid's zip code is really predicated on the quality of their education. We need to have them more countywide to create more equitable opportunities, especially since there are now so many unfunded mandates coming down from the federal and state government. One of the most critical ones is the mandate regarding comprehensive career readiness. We need to prepare our workforce, or else our economic future as a region, state, and country is going to be challenged.

(CB): And then you have vouchers coming to fund a private system that's based on the failure of the public system, which is, in large parts of the country, almost a perceived truth. There's a lot of work to do, but the kind of data collection you're doing, and the kinds of questions you're asking, are fundamental to me, to the reconstruction of America. In thinking of your career, I would say that you should look at that national picture as a conceptualist and see what needs to happen to build the second reconstruction. I think there's a lot of stuff coming up from the bottom. There are a lot of exciting new people coming into the political process, but it all ultimately has to get organized within our legislatures, Congress, our candidates for Congress, and our candidates for the presidency. This negative reaction against Trump will be an opportunity for big thinking. That is very difficult to have now. 1932 was for the Democrats, and then FDR used the phrase "New Deal," which was inserted in one draft of his speech as he was on the way to the convention. He said, "I pledge myself to a new deal," and the American people went bananas. So that is how the New Deal concept came, but Francis Perkins told me over and over that they had no plan for it to exist. She went in to be interviewed to be the Secretary of Labor, and she was already his Industrial Commissioner for New York. They knew each other well. So she laid out all of these things that he would have to support, including workers' compensation, Social Security, a forty-hour work week, an opposition against child labor, and so forth. He said, "Okay, Frances, but you have to do it yourself," and that's what she did. So that was where the policies of the New Deal came from, but the exiting administration was so discredited. The situation the people were living in was so bad. As Ms. Perkins said to me several times, we never could have done what we had done if things hadn't been that bad. Well, I think things have gotten to be that bad, and therefore, our capacity as self-governing people is going to be brought to the fore. I think we'll do it. But it's going to have to be built on very solid grounds of evidence, and it's the evidence that can allow people to sit around a table to start arguing over what the real choices are. They've got to believe that the data is accurate, and therefore, the questions you ask, you need data to answer. It becomes a critical public policy challenge, and you're doing that in this one quadrant of the Keystone State. As you think about your next career, I think you should be thinking about the national level.

(TO): Thank you. I will think about that!

(TG): Don't think of Frances Perkins, though. Think FDR. Go to the top.

(CB): [redacted]

[redacted]

[redacted]

(TG): Well, it was a wonderful partnership, and we're so lucky it happened. I would totally agree with Chris that you can make a huge contribution. You have a really unusual skill to pull people together in a very subtle but effective way. I just want to personally thank you for all that you've done, and I hope you'll continue doing some of those great things.

(TO): Thank you for including me. I appreciate it.

(TG): You are an important part of Wilkes' history. Even though there were parts of it that didn't work out, there were other parts that worked very well.

(TO): Oh, yeah. It was huge. And Tim, you can be modest, but it really was you. You secured the funding, got the collaborators together to talk, and put together that high-level strategic plan. You had that vision. It may have been high-level, and I may have refined it and put it to work, but it really was because of you.

(TG): Well, we can debate that another day. It wouldn't have happened without you, and I think, to some degree, Bill. There were also other key members in the community and in that small executive committee who came together and really got people behind it.

(TO): It was. Gene Roth may have been more subtle in his work, but he was definitely there. The two things I remember about him, and actually one of them was thrown in my face yesterday, were, "Teri, your meetings are too boring. Everything's going well, and that's great, but they're really boring. Make something up to shake it up a little bit." And then the second one is that every year he would ask for about a dozen or so of the indicator reports. I asked him, "What do you do with them?" and he goes, "Oh, I make the staff read them." I said, "Really? Okay," and I let it go. Then I was sitting next to Paul Rushton in a chamber meeting yesterday, and we were talking about the upcoming event. Now, Steve Roth is taking Paul's place, and he said, "I still remember when I started, Gene Roth would walk in the door, hold your book up in the air, and say, ‘I'm leaving this here. You better read it. You’d need to learn something about this area.’” I was like, “Wow, he really did that?” and he goes, “Oh yeah. Everybody got a copy.”

(CB): Gene Roth was my angel. In my seventeen years as president, there was no one greater than him.

(TG): He was everybody's angel. Paul, do you want to bring this baby home?

(PA): Teri, I keep thinking about this conversation. Do you know the quote from Daniel Boorstin? He was the Librarian of Congress, and he said, “The true obstacle to our progress is not ignorance, but the illusion of knowledge.” I've always used that around Wilkes, and that just seems to fit with turning information into insight.

(TO): Yes, it does! I never heard that before, thank you.

(TG): Sounds pretty pertinent to today, doesn't it? Well, thanks, everybody. It's hard to call this to a close. I hope the next time I'm up I get to break bread with you, Teri.

(TO): That'd be good.

(CB): Thank you, Teri. It was lovely to meet you.

(TO): Same here, Chris, thank you. Paul, it was nice seeing you and Tim.

(PA): Good to see you, Teri. Best wishes.

(TG): Thank you so much. Take care.