

UNIVERSITY OF MASSACHUSETTS SCHOOL OF PUBLIC HEALTH AND HEALTH SCIENCES

New Employee Survey at Plainridge Park Casino:

Analysis of First Two Years of Data Collection

May 10, 2017

University of Massachusetts Donahue Institute, Economic and Public Policy Research Group

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We would like to thank Mark Vander Linden, Director of Research and Responsible Gaming, Commissioner Bruce Stebbins, Director of Licensing Paul Connelly, and Director of Workforce, Supplier and Diversity Development Jill Griffin all of whose insight and careful review of draft versions of this report contributed to its clarity as well as utility to multiple audiences.

Introduction

The Social and Economic Impacts of Gambling in Massachusetts (SEIGMA) study, of which the Economic and Public Policy Research team at the UMass Donahue Institute (UMDI) is a part, strives to understand the impact of the introduction of casinos on the people and economy of the Commonwealth. Of interest in this endeavor is a better understanding of new employment opportunities offered by casino operators and characteristics of the workforce at point of hire. To this end, a survey was designed to gather a range of information on work-related characteristics and aspirations of new employees. This report presents summary findings from the first two years of new employee survey data collection at Plainridge Park Casino. Over time, survey data from all three casinos will help workforce development boards and policymakers understand the types of employees who want to work at the casinos, the extent to which employees are being trained, the number of employees drawn from the local labor supply, and net new job creation.

Methodology

While data collection responsibilities for the New Employee Survey reside exclusively with the Massachusetts Gaming Commission (MGC), the research team collaborated with the MGC to create the survey instrument and is responsible for analyzing results. The survey instrument was designed to collect information from new casino employees that could not be garnered by any other means. The survey uses the online tool SurveyMonkey, and is administered during the gaming license application process. Several key pieces of data are collected from each applicant: employment status prior to hire, whether the applicant currently works for the operator or is a new hire, reasons for seeking the job, whether the applicant moved to take the position, and training received in preparation for work at the casino (see Appendix for a copy of the survey instrument).

The survey is administered electronically via tablet computers. To ensure that the maximum number of new employees are exposed to the survey, new employees are given the tablets while they wait during the final phase of the gaming license application process. Once security checks and identity have been confirmed, applicants receive a conditional offer of employment. Only a few applicants are rejected after this stage so there will be a small discrepancy in the total pool of applicants and the cumulative total of current and previous employees at Plainridge Park Casino.

The vast majority of survey respondents are people who are new to the gaming industry and are now being hired for gaming and non-gaming positions at Plainridge Park Casino, including its food court vendors. A small number of people included in the survey already worked for Plainridge Park Casino's parent company, Penn National Gaming, Inc., and were transferred to Plainridge Park to assist in coordinating the opening of the new property. Responses may include Penn National employees who were borrowed by Plainridge Park Casino on a temporary basis as these employees did not go through the traditional licensing process and did not get fingerprinted. A report on the employment impacts of the construction of Plainridge Park Casino was completed in September 2016 and is available on the SEIGMA website (Motamedi & Peake, 2016).

¹ The survey itself is administered by the Massachusetts Gaming Commission and secondary data are shared with SEIGMA for analysis.

² Information about Penn National Gaming, Inc., the parent company of Plainridge Park Casino and owner of over 30 casinos across the United States, can be found on their website http://www.pngaming.com/Locations.

³ Current Penn National personnel go through an abbreviated process outlined in 2015 CMR 134.03 (2).

It is important to note that the total number of survey responses does not necessarily equal the total employment at Plainridge Park Casino at any given time. Because the survey is administered to each applicant only once, it can neither reveal whether the respondent continues employment at the gaming establishment nor the duration of that employment. For this reason, it may be more useful to interpret the number of responses as a count of people going through the licensing process rather than total employment. When the survey data are combined with employment data provided by Plainridge Park Casino, we will be able to determine a rate of turnover and have a better understanding of total employment.

Finally, it is worth noting that some changes to the questionnaire are planned going forward. These changes will allow for a better understanding of where employees move from to take jobs at the casino as well as employees' employment status prior to working at the casino.

Results

Data collection began in March 2015 and will likely continue as long as the casino remains in operation. This section discusses survey results from the first two years of data collection, which is the time leading up to the grand opening of Plainridge Park Casino until the end of March 2017.

Frequency of Responses During Data Collection Period

In March and April 2015, the number of new hires, as indicated by the volume of survey responses collected, was less than 100 total for both months. However as Plainridge Park Casino prepared for its grand opening on June 24, 2015,⁴ hiring increased dramatically. Hiring peaked in June 2015 with 264 new hires in just that month and a cumulative total of 544 since the introduction of the survey. Hiring declined after operations commenced with 115 new hires in July 2015 and only 31 and 30 new hires in August and September, respectively. By the end of March 2017, a total of 1,056 people had taken the survey.

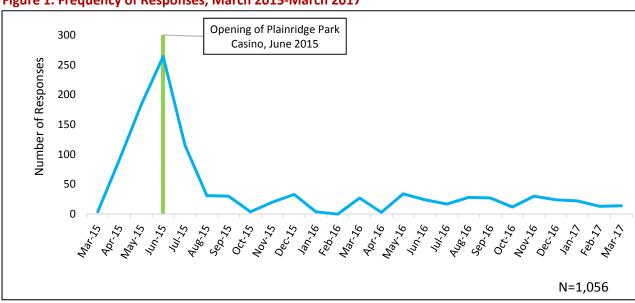


Figure 1. Frequency of Responses, March 2015-March 2017

⁴ Murphy, Sean P. "Gamblers Throng to Opening Day at Plainridge Casino". *Boston Globe*, June 24, 2015. Obtained online from https://www.bostonglobe.com/metro/2015/06/24/plainridge-park-casino-open-its-doors-today/ahf0F0yZr4CV9G7V5MGcCK/story.html.

Employee Transfers: Employees Who Currently Work for the Casino Operator

As noted earlier, a small subset of the survey respondents was previously employed at Plainridge Racecourse, the property that preceded the casino. Out of 1,012 respondents, only 3.5 percent (n=37), reported that they currently worked for the operator (Penn National Gaming, Inc.). Of those 37 employees, almost 29 percent indicated that they relocated to take the position at Plainridge Park Casino while 71 percent did not move for their position.

Understanding the destination of movers is just as important as their origins because some of these employees represent a new population to the Commonwealth. Without the new gaming position at Plainridge Park Casino, it is likely that the employee would have remained in their previous location and had no impact on the regional economy.

Table 1. Employees Who Currently Work for the Operator

Do you currently work for this casino operator but at a different location? (e.g., at another gaming establishment or headquarters/administrative office)	Response Count	Response Percent
Yes	37	3.5%
No	1,019	96.5%
Total Answered Questions	1,056	100.0%
Total Skipped Questions	1	

Note: The response percent is based on the number of answered questions. The total number of responses for each question varies because some respondents did not complete the survey or did not answer all of the questions.

Table 2. Employees Who Currently Work for the Operator and Moved to Take the Position

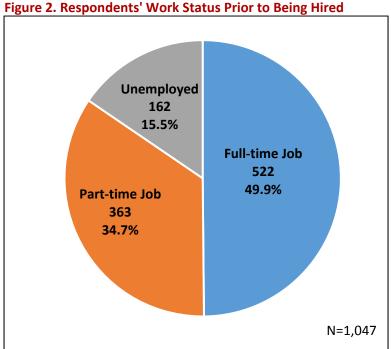
Current Employees Who Moved	Response Count	Response Percentage
Yes	10	28.6%
No	25	71.4%
Total Answered Questions	35	100.0%
Total Skipped Questions	2	

Note: The response percent is based on the number of answered questions. The total number of responses for each question varies because some respondents did not complete the survey or did not answer all of the questions.

Employees' Work Status Prior to Being Hired at Plainridge Park Casino

Creating employment opportunities for unemployed or underemployed Baystaters is a priority of the Expanded Gaming Act. According to evidence supplied by the survey responses, the hiring at Plainridge Park Casino is meeting this objective. Slightly over one half of the respondents (n=525) reported that they were either unemployed or were employed part-time prior to taking their positions at Plainridge Park Casino. The remaining respondents (n=522) were previously employed full-time. Using data from our revised survey instrument, we will be able to discern how many people experience a change in their employment status from part-time to full-time as a result of the introduction of casinos. The recruitment of workers who were previously unemployed is especially relevant because this group did not leave jobs in other industries and thus can be directly counted as new employment in Massachusetts. Those who are leaving other jobs will create vacancies which could be filled by someone who is underemployed or unemployed. All of these considerations will be vital to understanding the types of employees who work in the Commonwealth's new gaming establishments and the effects employment and hiring will have on the regional labor market.

Further exploration of the new employees who indicated that they were previously unemployed reveals a few important observations. First, unemployed workers comprised a sizable portion of initial hires at the casino. Plainridge Park Casino hired the highest number of previously unemployed workers in May 2015 with 41 new hires, or 25.3 percent of all previously unemployed respondents. In the two months following, June and July, 28 and 24 respondents (or 17.3 and 14.8 percent respectively) were unemployed before being hired by the casino. Second, most formerly unemployed workers were new to the gaming industry. Only 9.3 percent of applicants who were previously unemployed had previous experience working at a gaming establishment (n=15). Over 83 percent of previously unemployed respondents had not received training by the time of hire (n=134). Lastly, less than six percent of previously unemployed respondents moved in order to take their positions at Plainridge Park Casino (n=9). When considered together, the average applicant who was previously unemployed did not have experience working at a gaming establishment, did not receive training prior to their hiring and did not move to take their position at Plainridge Park Casino.



Note: The response percent is based on the number of answered questions. The total number of responses for each question varies because some respondents did not complete the survey or did not answer all of the questions.

5

⁵ See "Employees Who Received Training" on page 11 for more information.

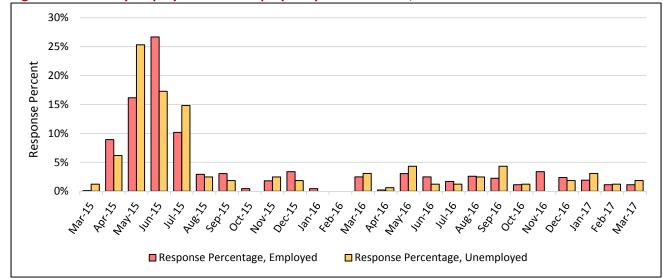


Figure 3. Previously Employed and Unemployed by Month of Hire, March 2015 - March 2017

Note: The total number of responses for each question varies because some respondents did not complete the survey or did not answer all of the questions.

Table 3. Profile of Previously Unemployed Applicants

Personne to Overtion	Has Previous Experience		Received Training			l to Take sition
Response to Question	Response	Response	Response	Response	Response	Response
	Count	Percentage	Count	Percentage	Count	Percentage
Yes	15	9.3%	27	16.8%	9	5.6%
No	147	90.7%	134	83.2%	153	94.4%
Total Answered Questions	162	100.0%	161	100.0%	162	100.0%
Total Skipped Questions	0		1		0	

Note: The response percent is based on the number of answered questions. The total number of responses for each question varies because some respondents did not complete the survey or did not answer all of the questions.

Reasons for Seeking Employment at Plainridge Park Casino

According to the survey responses, the three most popular reasons for seeking employment at Plainridge Park Casino were excitement for working at a casino (52.8 percent), career advancement (47.7 percent) and improved pay (43.8 percent). Improved benefits was the fourth most common reason for working at the casino with 34.6 percent of respondents selecting this option. Only 29.1 percent of respondents specified that the job's proximity to home contributed to their decision to apply to Plainridge Park Casino. Slightly over a quarter of total respondents stated that the casino's flexible hours was a factor that attracted them.

We encouraged respondents to convey their own reasons for seeking employment at the casino and the need for extra income was the top reason followed by having current employment at the gaming establishment. Respondents also cited wanting a change in career, graduating from college, using the position as an opportunity to work toward their career goals, and entering retirement as reasons for working at the casino.

Excitement for working at a casino and career advancement were among the top three reasons for new hires regardless of their employment status prior to hire. Career advancement was the most common response for new hires who had been previously employed full-time. Improved pay was a more common reason among previously employed respondents and was the sixth highest motive for respondents who had

been unemployed prior to hire. The casino's proximity to home was a more popular reason among previously full-time or unemployed respondents.

It is important to note that the response rate for the unemployed and needed work option (n=236) is greater than the number of respondents who indicated that they were currently unemployed (n=162). We believe that the discrepancy results from a lack of clarity in the prior question: some respondents used it to indicate their need for work rather than an unemployed status. For example, some employees who held full-time jobs before working for Plainridge Park Casino indicated that one motivation for taking a position at the casino was that they were unemployed and needed work or were underemployed. While underemployment of formerly full-time workers is the most likely interpretation of these data, we have developed this question further to obtain more clarity in the updated survey.

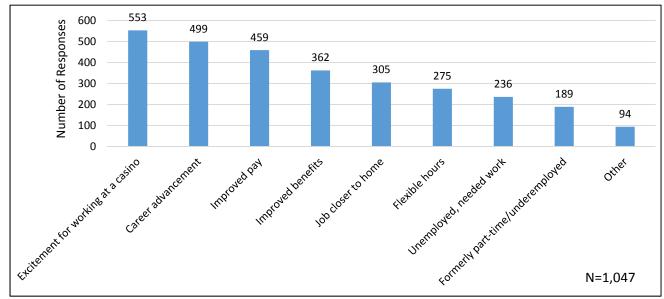


Figure 4. Reasons for Seeking Employment at Plainridge Park Casino

Note: Respondents were allowed to select more than one reason for seeking employment so response totals for this question will exceed the total number of survey respondents.

Table 4. Other Reasons for Seeking Employment at Plainridge Park Casino

Other Reasons for Seeking Employment at Plainridge Park Casino	Response Count
Extra income	23
Current Plainridge Park employee	15
Wanted a change/new career	12
Opportunity to work towards career goals	5
Recent college graduate/seeking short-term employment	5
Currently employed at a franchise with a casino location	4
Already relocating to area	3
Benefits	3
Friends work here/referred to the job	3
Other	11
Total Answered Questions	84
Total Skipped Questions	18

Note: Eight respondents did not check the "Other" option but still wrote a comment in the text field. "Skipped" in this question indicates that the respondent selected the option for "Other" but did not type a response into the text field. The total of the "Answered" and "Skipped" questions will therefore exceed the original 94 respondents who answered "Other" to this question.

Table 5. Reasons for Seeking Employment at Plainridge Park Casino by Previous Employment Status

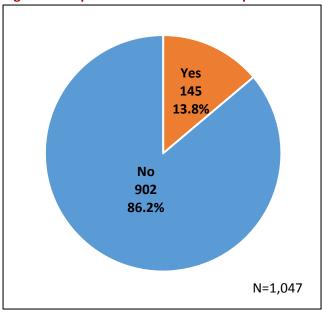
Reasons for Seeking Employment at	Response Count			
Plainridge Park Casino	Full-time Job	Part-time Job	Unemployed	Total
Excitement for working at a casino	264 (50.6%)	203 (55.9%)	86 (53.1%)	553
Career advancement	277 (53.1%)	160 (44.1%)	62 (38.3%)	499
Improved pay	228 (43.7%)	188 (51.8%)	43 (26.5%)	459
Improved benefits	195 (37.4%)	118 (32.5%)	49 (30.2%)	362
Job closer to home	150 (28.7%)	96 (26.4%)	59 (36.4%)	305
Flexible hours	110 (21.1%)	130 (35.8%)	35 (21.6%)	275
Unemployed, needed work	81 (15.5%)	35 (9.6%)	120 (74.1%)	236
Formerly part-time/underemployed	39 (7.5%)	136 (37.5%)	14 (8.6%)	189
Other	58 (11.1%)	29 (8.0%)	7 (4.3%)	94
Total Respondents	522 (100.0%)	363 (100.0%)	162 (100.0%)	1,047

Note: Respondents were allowed to select more than one reason for seeking employment so response totals for this question will exceed the total number of survey respondents. Percentages indicate every answer's share of total responses for each previous employment status.

Respondents with Previous Experience Working at a Gaming Establishment

More than 80 percent of new hires (n=902) reported that they did not have previous experience in the gaming industry before taking a job at Plainridge Park Casino, while 13.8 percent of respondents (n=145) had previous experience. Establishing baseline experience levels of employees will inform us about opportunities that exist for employees to acquire training, grow in their occupations and advance their careers.

Figure 5. Respondents with Previous Experience Working at a Gaming Establishment



Note: The response percent is based on the number of answered questions. The total number of responses for each question varies because some respondents did not complete the survey or did not answer all of the questions.

Table 6. Respondents with Previous Experience at a Gaming Establishment

Do you have previous experience working	Response Count		
at a gaming establishment?	Current PPC Other New		Total
Yes	17	128	145
No	18	884	902
Total Answered Questions	35	1,012	1,047
Total Skipped Questions	2	7	9

Note: The response percent is based on the number of answered questions. The total number of responses for each question varies because some respondents did not complete the survey or did not answer all of the questions.

Employees Who Moved to Take a New Position at Plainridge Park Casino

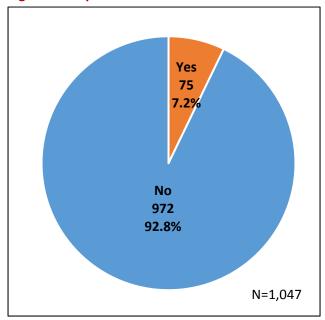
Another important piece of information is the residence of new employees at Plainridge Park Casino. The revised survey will collect information on home residences by town. In the meantime, the survey analysis shows that more than 92 percent of new employees did not move or plan to move to take their new job. We assume that this means that most new employees live within the immediate region—either within Massachusetts or Rhode Island. Detail on places of residence will be provided in the Plainridge Park Casino Operator Impacts Report due to be released in the spring of 2017.

The initial version of the survey collected information on new hires who moved home residences to take their new job. Only 7.2 percent of new hires (n=75) stated that they moved or planned to move in the next six months in order to take the new position at Plainridge Park Casino. Over one quarter of movers (n=20) relocated from other regions in Massachusetts, such as the Metro Boston area, Nantucket, Bristol County, and Norfolk County. These movers were already residents of Eastern Massachusetts and presumably lived farther than they were willing to commute for their position at Plainridge Park Casino. Twenty-nine percent of transplants (n=22) moved from other states in New England and more than 40 percent of movers (n=32) were from states outside of the New England region, such as Ohio, Pennsylvania, Nevada, and New Jersey.

The town with the highest number of movers was Plainville (n=13), although the majority of movers relocated to other cities and towns in Massachusetts or Rhode Island. Over one quarter of transplants (n=19) moved to MGC-designated surrounding communities and just over 30 percent (n=23) moved to Rhode Island. As can be seen in the map below, movers tended to gravitate towards communities along Interstate 95, stretching all the way from Pawtucket and Providence, in Rhode Island, to Attleboro and North Attleborough. Given the close proximity of Plainville to Rhode Island and its accessibility to the highway, it is reasonable that a number of employees would commute to their jobs from these locations.

The results of our analysis of movers show that most movers relocated from out-of-state and, while most did not move to Plainville, they still resettled in the immediate region.

Figure 6. Respondents Who Moved to Take the New Position at Plainridge Park Casino



Note: The response percent is based on the number of answered questions. The total number of responses for each question varies because some respondents did not complete the survey or did not answer all of the questions.

Table 7. Origin and Destination of Employees Who Moved to Take the New Position⁶

Origin	Response Count	Response Percent
Massachusetts	20	26.7%
Other New England States	22	29.3%
Mid-Atlantic States	13	17.3%
Midwest	11	14.7%
Other	8	10.7%
Not Reported	1	1.3%
Total	75	100.0%

Destination	Response Count	Response Percent
Plainville, MA	13	17.3%
Surrounding Communities	19	25.3%
Rhode Island	23	30.7%
Other MA Cities	16	21.3%
Not Reported	4	5.3%
Total	75	100.0%

⁶ The number of employees who did not report a destination represents those respondents who indicated that they planned to move or moved already but did not enter a city or town name into the answer field. We are currently working towards improving the survey instrument to improve completion of responses to this question.

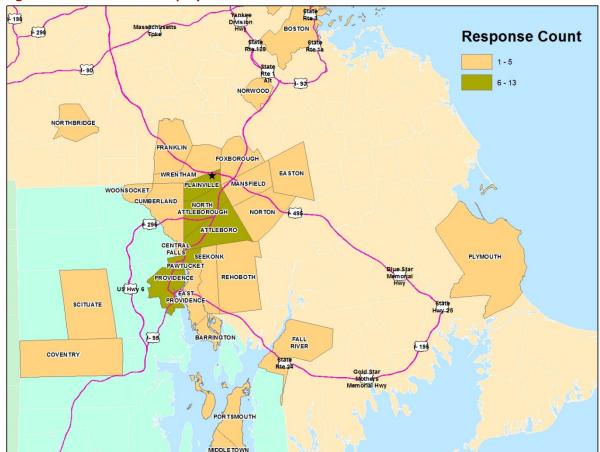


Figure 7. Destinations of Employees Who Moved to Take the New Position

Employees Who Received Training

Similar to employees' previous experience, training is important to employees' longevity, career prospects and earning potential, regardless of whether it takes place as the employee works or before they start the job. Employees were asked about whether they received training to raise their skills prior to taking their new position at Plainridge Park Casino and 25.3 percent (n=265) reported that they received training while 74.7 percent (n=781) indicated that they did not receive training.

When we compare the distributions of training across respondents' casino-related experience, we see that the majority of the new casino workforce is not entering their new positions with previous experience and has not received training at the time of hire (n=696). To be clear, this question examines the presence of pre-employment training regardless of whether or not an employee is trained on-the-job after being hired. The receipt of training was proportionally higher for employees who had previous experience working at a gaming establishment prior to starting their job at Plainridge Park Casino. This finding suggests that the subset of employees without pre-employment training may nevertheless have access to on-the-job training in their new positions. Job titles are included in the operator data and will help to answer questions about how training may affect employees' advancement within the casino. We are also seeking additional information about the nature of pre-employment training including whether it was obtained from a more institutional setting such as a college or training center. The Massachusetts Casino Career Training Institute (MCCTI), for instance, is a collaborative workforce development partnership of the state's 15 community colleges and currently offers education, training and certification programs (http://www.mccti.org/home.html).

11

Another important observation is that the recipients of training were more likely to have been previously employed full-time. Fifty seven percent of respondents who received training also reported that they worked full-time before taking their positions at the casino (n=152). Conversely, the 52 percent of respondents who did not receive training was mostly comprised of those who were previously unemployed or worked part-time (n=411). This means that training is reaching more employees who came from full-time positions than from part-time positions or unemployment. Accessibility to – or knowledge of – training opportunities may be a contributing factor to higher response rates amongst those who were previously employed full-time. What constitutes "training" may also be at issue. The revised survey will collect more detailed information on the degree of interest in various types and sources of casino career training.

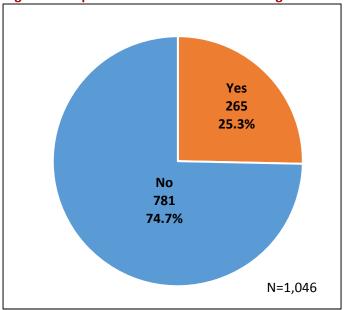


Figure 8. Respondents Who Received Training to Raise Skills for Their New Position

Note: The response percent is based on the number of answered questions. The total number of responses for each question varies because some respondents did not complete the survey or did not answer all of the questions.

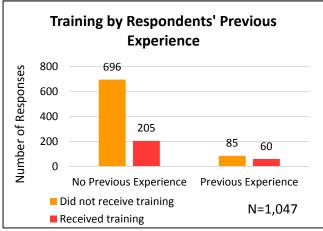
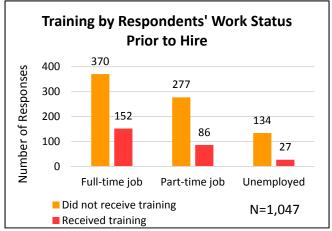


Figure 9. Training by Respondents' Work Status Prior to Hire and Previous Experience



Note: The response percent is based on the number of answered questions. The total number of responses for each question varies because some respondents did not complete the survey or did not answer all of the questions.

Conclusion and Next Steps

Our findings from the first two years of data collection on newly licensed employees reveal several important characteristics of new hires at Plainridge Park Casino and the emergent casino workforce in Massachusetts. Most new hires did not transfer from other Penn National Gaming locations. Approximately one half of new hires worked part-time or were unemployed before obtaining their job at Plainridge Park Casino. Major reasons for seeking employment included career advancement and improved pay. And nearly three-quarters of respondents did not receive pre-employment training to raise their skills.

The initial employee survey also identified areas where the questionnaire requires further refinement to elicit the information we need for analysis. Employment status and residence are two key concepts that we will explore in greater depth in the revised survey. New questions about employees' place of residence will help us to understand where non-movers live. It will similarly be necessary to collect data on employees' occupation and salary before and after working at the casino, industry of previous employment, educational attainment, and sources and types of training. The survey itself has undergone extensive revisions to improve data quality and obtain more detail in these areas in order to collect a more comprehensive data set about new casino employees.

References

Motamedi, R. & Peake, T. (2016). *The Construction of Plainridge Park Casino: Spending, Employment, and Economic Impacts*. Amherst, MA: School of Public Health and Health Sciences, University of Massachusetts Amherst. Available at www.umass.edu/seigma.

Appendix

This survey is being conducted on behalf of the Massachusetts Gaming Commission to estimate the effects of gaming on the Massachusetts economy and its people. As a prospective employee at Plainridge Park Casino, your participation is requested as part of this effort. The survey focuses on your employment status prior to starting your job at Plainridge Park Casino, whether you moved to take the job, and your reasons for seeking a job. This optional questionnaire should take less than 5 minutes to complete and you can stop at any point. Please be assured that your responses will be held in the strictest confidence. No identifying information will be displayed in any public releases of survey results.

Thank you for your participation.

Indicate which gaming establishment you will be working for.

- MGM Springfield
- Plainridge Park Casino
- Wynn Boston Harbor

Do you currently work for this casino operator but at a different location? (e.g., at another gaming establishment or headquarters/administrative office)

- Yes
- No

Wh	at is your Massachusetts Gaming Commiss	ion license or registration number?

Please indicate your work status prior to being hired by the gaming establishment.

- Full-time job
- Part-time job
- Unemployed

Please indicate your reason(s) for seeking a job at the gaming establishment. Check all that apply.

- o Improved pay.
- o Improved benefits (e.g., health insurance).
- o Excitement/enthusiasm for working at a casino.
- Career advancement.
- o Flexible hours.
- o Job closer to home.
- o Unemployed, needed work.
- o Formerly part-time/underemployed, needed more work.
- o Other

Other (please specify)	

 Do you have previous experience working at a gaming establishment? Yes No 	
Have you moved or do you plan to move in the next 6 months to take your ne Yes No	ew position?
What is the city of the residence you are moving from (e.g., Erie)?	
What is the state of the residence you are moving from (e.g., Pennsylvania)?	AL Alabama AK Alaska AS American Samoa AZ Arizona AR Arkansas CA California CO Colorado CT Connecticut DE Delaware DC District of Columbia FL Florida GA Georgia GU Guam HI Hawaii ID Idaho IL Illinois IN Indiana IA Iowa KS Kansas KY Kentucky LA Louisiana ME Maine MD Maryland MA Massachusetts MI Michigan MN Minnesota MS Mississippi MO Missouri MT Montana NE Nebraska NV Nevada NH New Hampshire NJ New Jersey NM New Mexico NY New York NC North Carolina ND North Dakota MP Northern Mariana Islands OH Ohio OK Oklahoma OR Oregon PA Pennsylvania PR Puerto Rico RI Rhode Island SC South Carolina SD South Dakota TN Tennessee TX Texas VI U.S. Virgin Islands UT Utah VT Vermont VA Virginia WA Washington WV West Virginia WI Wisconsin WY Wyoming

What is the state of the residence you are moving to (e.g., Pennsylvania)?	AL Alabama AK Alaska AS American Samoa AZ Arizona AR Arkansas CA California CO Colorado CT Connecticut DE Delaware DC District of Columbia FL Florida GA Georgia GU Guam HI Hawaii ID Idaho IL Illinois IN Indiana IA Iowa KS Kansas KY Kentucky LA Louisiana ME Maine MD Maryland MA Massachusetts MI Michigan MN Minnesota MS Mississippi MO Missouri MT Montana NE Nebraska NV Nevada NH New Hampshire NJ New Jersey NM New Mexico NY New York NC North Carolina ND North Dakota MP Northern Mariana Islands OH Ohio OK Oklahoma OR Oregon PA Pennsylvania PR Puerto Rico RI Rhode Island SC South Carolina SD South Dakota TN Tennessee TX Texas VI U.S. Virgin Islands UT Utah VT Vermont

Did you receive any training to raise your skills for your new position?

- Yes
- No

Thank you for taking the time to complete this survey.

VA Virginia WA Washington WV West Virginia WI Wisconsin WY Wyoming