

# Economic Impact Study U.S.-Based Scrap Recycling Industry (2013) *Executive Summary*

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Scrap recycling is a major U.S.-based industry dedicated to transforming end-of-life products and industrial scrap into new commodity grade materials and driving economies by making the old, new again. Recognized as one of the world’s first green industries, scrap recycling creates and supports jobs and has a positive impact on the environment by reducing greenhouse gas emissions, saving energy and protecting our natural resources. In 2013, the Institute of Scrap Recycling Industries (ISRI), Inc. retained the independent economic consulting firm of John Dunham and Associates to perform an economic impact analysis to document the size and scope of the scrap recycling industry in the United States and document its significant contribution to the U.S. economy, in terms of employment, tax generation and overall economic benefit.

The U.S. scrap recycling industry is not only a thriving economic engine, but also a pivotal player in environmental protection, resource conservation and sustainability. The industry recycled more than 135 million metric tons of materials in 2011, transforming outdated or obsolete scrap into useful raw materials needed to produce a range of new products.<sup>1</sup> Recycling reduces greenhouse gas emissions by significantly saving the amount of energy needed to manufacture the products that we buy, build and use every day. The energy saved by recycling may then be used for other purposes, such as heating our homes and powering our automobiles.



In addition to being an environmental steward, the study confirmed that the U.S. scrap recycling industry plays a prominent role as an economic leader, job creator and major exporter. Specifically, the study found that the people and firms that purchase, process and broker old materials to be manufactured into new products in America provide 462,940 adults with good jobs in the United States<sup>2</sup> and generate more than \$87 billion annually in economic activity.

(\$ Million)	Direct	Supplier	Induced	Total
Jobs	137,970	131,917	193,053	462,940
Wages	\$9,586.20	\$7,948.42	\$9,265.54	\$26,800.16
Economic Impact	\$34,691.38	\$24,366.92	\$28,337.88	\$87,396.19

<sup>1</sup> Data from The ISRI Scrap Yearbook 2012, Institute of Scrap Recycling Industries, Inc.

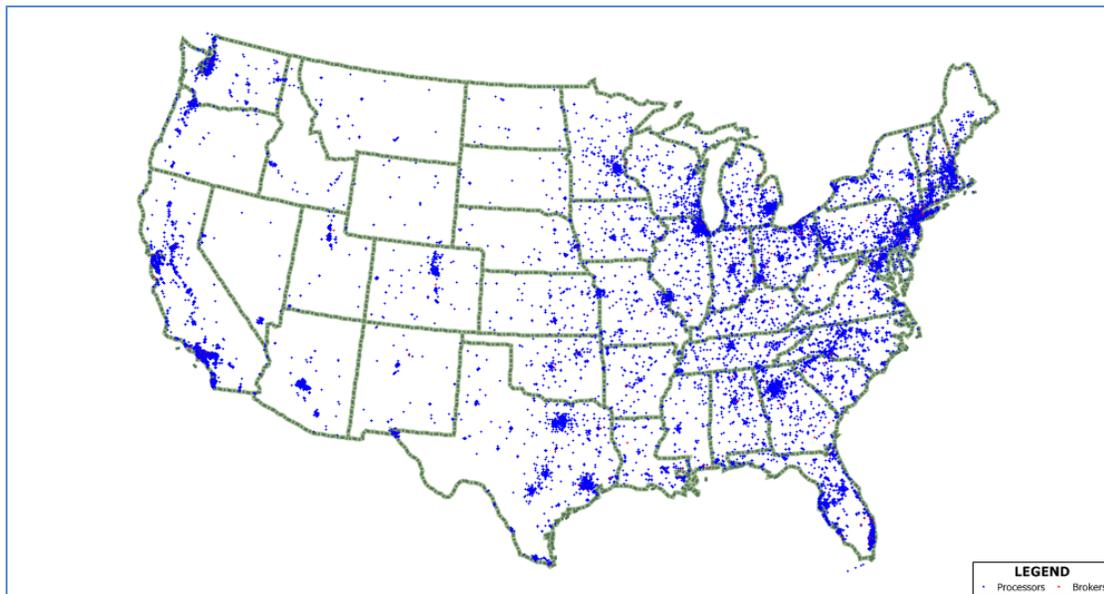
<sup>2</sup> Based on the Economic Impact of the Scrap Recycling Industry in the United States (2013), produced for the Institute of Scrap Recycling Industries, Inc. by John Dunham and Associates, 2013.

## Summary of Findings

### Employment: Source of Green Jobs

While many in the public policy world talk about the need for more *green jobs*, the scrap recycling industry has already been creating these environmentally friendly jobs and other opportunities here in the United States for decades. The study found that in 2013, 137,970 jobs are being supported by the manufacturing and brokerage operations of the scrap recycling industry in the United States.<sup>3</sup> These are good jobs paying an average of \$69,480 in wages and benefits to American workers. In addition to this, 324,970 jobs throughout the U.S. economy are indirectly supported by the scrap recycling industry through suppliers and the indirect impact of the industry's expenditures.<sup>4</sup>

### U.S. Scrap Recycling Industry Facilities



These are real people with real jobs -- not only in firms that process scrap materials into new, usable commodity inputs, but in firms that supply the industry with recycled materials, like auto yards and independent peddlers, as well as firms that supply machinery, trucks and services to processors. In addition, thousands of people in industries seemingly unrelated to scrap materials recycling, from servers in restaurants, to construction workers, to teachers in local schools, depend on the re-spending of the wages and taxes paid by scrap recycling industry to their workers and suppliers.

The economic benefits generated by the scrap recycling industry are widespread. Not only are scrap facilities located in every state throughout the country and in both urban and rural communities, but the firms that supply materials, good and service to processors and brokers are also located in every part of the country. This means that the U.S. scrap recycling industry provides good-paying jobs in every state in the union. The study results are broken down by state, congressional district and state legislative districts at [www.isri.org/jobs](http://www.isri.org/jobs).

<sup>3</sup> This includes firms involved in the purchasing, processing and brokering of scrap materials including ferrous and nonferrous metals, paper, electronics, rubber, plastics, glass and textiles.

<sup>4</sup> Direct impacts are those associated with scrap processors and brokers. Supplier impacts are associated with firms providing goods and services to scrap recyclers and brokers, including peddlers, and induced impacts are those resulting from the re-spending of wages by workers in the direct and supplier sectors.

## Overall Economic Activity

The activities of the scrap recycling industry in the United States generate nearly \$87.4 billion annually in economic benefits here at home. All told, the U.S. scrap recycling industry accounts for 0.55% of the nation's total economic activity,<sup>5</sup> making it similar in size to the cosmetics industry, the milk industry and the aircraft engine industry.

## Tax Revenues to Federal, State and Local Governments

The scrap recycling industry generates substantial revenues for state and local governments throughout the United States, as well as for the federal government.

- The industry generates about \$4.0 billion in state and local revenues annually, revenues that are used to help communities and people throughout the country.
- Another \$6.3 billion in federal taxes are paid annually by the industry and its employees.



## Export Activities: Creating Thousands of Jobs Here at Home

Scrap commodities are among the nation's largest exports by value, and overall, exports account for 39% of the industry's economic activity. These exports create approximately 184,750 good green jobs in the United States and help strengthen the national economy. According to the study, in 2013, 56,364 jobs are directly supported by the export activities associated with the processing and brokerage operations of scrap recyclers operating in the United States.<sup>6</sup> An additional 128,385 jobs are supported by supplier operations and through the indirect effects of scrap recycling exports. These jobs pay a total of \$6.8 billion in wages. All of this activity generates \$33.9 billion in economic benefits in the United States and contributes \$1.9 billion in tax revenues for the federal government and \$1.6 billion in state and local taxes.

**Summary Table: Economic Impact of U.S. Scrap Recycling Exports**

	Direct	Supplier	Induced	Total
Jobs	56,364	52,081	76,304	184,750
Wages	\$3,836,460,000	\$3,094,114,500	\$3,662,214,400	\$10,592,788,900
Economic Impact	\$13,255,560,400	\$9,427,388,700	\$11,200,577,500	\$33,883,526,600

This is because scrap materials that are intended for export must be collected, separated and prepared for transport out of the United States. The steps in this process provide well-paying U.S. jobs. In fact, were it not for these export markets, many materials, including post-consumer paper and electronics

<sup>5</sup> Bureau of Economic Analysis. GDP based on first quarter of 2013, third estimate value of \$15.984 trillion, see: Gross Domestic Product, First Quarter 2013 (third estimate); Corporate Profits, First Quarter 2013 (revised estimate), Bureau of Economic Analysis, June 26, 2013.

<sup>6</sup> This includes firms involved in the purchasing, processing and brokering of scrap materials including ferrous and nonferrous metals, paper, electronics, rubber, plastics, glass and textiles.

would probably not be recycled at all simply because there is no demand for them in the United States.<sup>7</sup> By opening up new markets, the nation's recycled materials producers create demand for materials that might otherwise end up in landfills.

In the case of electronic products, for example, there simply is not enough demand in the United States for the more expensive post consumer materials, including gold and titanium, that may be smelted out of circuit boards, capacitors and other electronic parts. On the other hand, countries like India, where demand for gold is particularly high, see value in these materials.<sup>8</sup>

The scrap industry is the first link in the global supply chain for the growing demand of all manner of commodities ranging from iron and steel to paper; nonferrous metals such as aluminum, copper, and zinc; plastics; electronics; rubber; and more. The result is economic and environmental sustainability for our nation and our world through the supply of high quality, environmentally friendly and energy saving raw materials to the global marketplace.

In 2012, the industry exported nearly \$34 billion in commodity grade scrap products to more than 155 countries, significantly helping the U.S. balance of trade. In fact, in terms of volume, scrap materials are



among the nation's largest commodity exports, in line with other important commodity export products like grain and corn, cotton, timber and petroleum. The scrap materials processed in the United States are exported to other countries for manufacture into new products. Rather than encouraging the use of virgin materials, America's recycled materials help reduce worldwide energy demand and greenhouse gases as well as the need to mine and harvest virgin materials

### **Economic Benefits of Exporting Scrap Commodities Are No Different Than Those That Occur Exporting Any Other Product**

International trade is an important part of the American economy. In 2012, nearly \$2.210 trillion in goods and services were exported from the United States, and about \$2.745 trillion were imported.<sup>9</sup> More than 50 million Americans work for companies that engage in international trade, according to the U.S. Chamber of Commerce, and one in three manufacturing jobs depends on exports.<sup>10</sup> The U.S.

<sup>7</sup> One reason that so much waste paper is sent to China for reprocessing is that wood pulp is very expensive in Asia. In the United States, on the other hand, integrated paper manufacturers use a mixture of pre- and post-consumer recycled paper as well as wood pulp from specially raised forests to manufacture paper products.

<sup>8</sup> India accounted for over one-quarter of world gold demand in the 1<sup>st</sup> quarter of 2013, the last period for which data are available. Together, India and China accounted for about 54 percent of world demand. The United States, on the other hand accounted for just about 5 percent. About 9 percent of India's gold comes from recycled materials. See: *Gold Demand Trends: First Quarter 2013*, World Gold Council, May 2013.

<sup>9</sup> *US International Trade in Goods and Services: May 2013*, Press Release, US Department of Commerce, Bureau of Economic Analysis, July 3, 2013. Available on-line at: [www.bea.gov/newsreleases/international/trade/tradnewsrelease.htm](http://www.bea.gov/newsreleases/international/trade/tradnewsrelease.htm)

<sup>10</sup> *The Benefits of International Trade and Investment*, US Chamber of Commerce, on-line at: [www.uschamber.com/trade](http://www.uschamber.com/trade)

International Trade Association projects that U.S. exports supported an estimated 9.8 million jobs in 2012, up from 9.7 million in 2012.<sup>11</sup>

To suggest that the export of recycled commodities would somehow destroy jobs in the United States is no different than stating that the export of corn, or of coal or of cotton, somehow takes away American jobs. In fact, President Barack Obama, in his first State of the Union address to Congress, highlighted exports as a pillar of economic growth on which the country will depend in the future.<sup>12</sup>

## Economic and Job Impacts on a State-by-State Level



Economic Contribution of Scrap Recycling Industry, 2013  
(\$ 000)

All Industries	Direct			Suppliers			Induced			Total		
	Jobs	Wages	Output	Jobs	Wages	Output	Jobs	Wages	Output	Jobs	Wages	Output
Alabama	2,265	\$ 144,532	\$ 550,942	3,964	\$ 222,933	\$ 644,424	2,647	\$ 102,551	\$ 312,700	8,876	\$ 470,016	\$ 1,508,067
Alaska	142	\$ 11,376	\$ 35,064	90	\$ 8,327	\$ 22,803	135	\$ 6,566	\$ 20,543	367	\$ 26,270	\$ 78,411
Arizona	2,513	\$ 212,304	\$ 729,610	2,009	\$ 108,008	\$ 312,848	4,571	\$ 205,095	\$ 600,649	9,093	\$ 525,407	\$ 1,643,108
Arkansas	1,361	\$ 69,373	\$ 264,253	5,925	\$ 339,642	\$ 961,353	1,026	\$ 38,291	\$ 119,614	8,312	\$ 447,306	\$ 1,345,220
California	15,887	\$ 1,146,269	\$ 4,118,439	14,729	\$ 972,018	\$ 2,837,639	27,256	\$ 1,520,458	\$ 4,911,321	57,872	\$ 3,638,745	\$ 11,867,399
Colorado	1,653	\$ 158,258	\$ 494,280	1,242	\$ 80,060	\$ 242,726	2,387	\$ 106,348	\$ 332,596	5,282	\$ 344,666	\$ 1,069,601
Connecticut	1,653	\$ 135,284	\$ 463,406	848	\$ 62,275	\$ 162,737	1,879	\$ 108,933	\$ 292,816	4,380	\$ 306,491	\$ 918,959
Delaware	201	\$ 13,428	\$ 50,566	583	\$ 43,153	\$ 111,029	149	\$ 6,741	\$ 19,857	933	\$ 63,322	\$ 181,452
District of Columbia	61	\$ 5,383	\$ 27,670	7	\$ 651	\$ 1,643	6	\$ 371	\$ 967	74	\$ 6,405	\$ 30,280
Florida	6,941	\$ 431,424	\$ 1,453,857	5,102	\$ 261,100	\$ 757,168	10,635	\$ 467,696	\$ 1,421,490	22,678	\$ 1,160,220	\$ 3,632,515
Georgia	5,295	\$ 316,657	\$ 1,199,851	8,465	\$ 524,938	\$ 1,508,760	6,982	\$ 317,164	\$ 937,815	20,742	\$ 1,158,759	\$ 3,646,426
Hawaii	413	\$ 26,103	\$ 84,925	147	\$ 7,478	\$ 25,461	307	\$ 12,879	\$ 43,352	867	\$ 46,460	\$ 153,739
Idaho	493	\$ 40,206	\$ 193,982	295	\$ 15,168	\$ 69,026	322	\$ 11,188	\$ 35,297	1,110	\$ 66,552	\$ 298,304
Illinois	6,572	\$ 563,417	\$ 1,939,045	5,778	\$ 378,495	\$ 1,243,829	12,688	\$ 667,541	\$ 2,008,433	25,038	\$ 1,609,453	\$ 5,191,306
Indiana	3,584	\$ 249,374	\$ 888,794	2,926	\$ 153,571	\$ 558,293	4,557	\$ 183,943	\$ 574,220	11,067	\$ 586,888	\$ 2,021,307
Iowa	1,758	\$ 92,680	\$ 424,082	2,330	\$ 124,138	\$ 526,548	1,193	\$ 46,009	\$ 141,297	5,281	\$ 262,827	\$ 1,091,927
Kansas	742	\$ 41,966	\$ 155,863	701	\$ 33,183	\$ 160,162	548	\$ 21,346	\$ 66,250	1,991	\$ 96,494	\$ 382,275
Kentucky	2,543	\$ 153,328	\$ 611,006	2,242	\$ 131,845	\$ 403,146	2,651	\$ 104,953	\$ 333,664	7,436	\$ 390,126	\$ 1,347,816
Louisiana	1,626	\$ 105,379	\$ 345,721	1,290	\$ 77,061	\$ 290,586	1,739	\$ 71,891	\$ 229,295	4,655	\$ 254,331	\$ 865,601
Maine	578	\$ 27,425	\$ 102,038	382	\$ 19,002	\$ 55,460	500	\$ 19,821	\$ 58,294	1,460	\$ 66,249	\$ 215,792
Maryland	1,442	\$ 93,834	\$ 338,701	1,198	\$ 74,673	\$ 211,341	1,644	\$ 79,161	\$ 228,703	4,284	\$ 247,668	\$ 778,745
Massachusetts	2,985	\$ 223,888	\$ 758,190	1,800	\$ 127,568	\$ 342,528	4,027	\$ 237,018	\$ 647,459	8,812	\$ 588,475	\$ 1,748,176
Michigan	4,988	\$ 326,696	\$ 1,129,688	3,677	\$ 200,902	\$ 591,317	7,780	\$ 336,621	\$ 1,040,224	16,445	\$ 864,219	\$ 2,761,229
Minnesota	2,359	\$ 151,242	\$ 564,156	3,371	\$ 203,769	\$ 670,156	3,472	\$ 162,975	\$ 506,882	9,202	\$ 517,986	\$ 1,741,193
Mississippi	811	\$ 44,173	\$ 163,094	2,567	\$ 130,636	\$ 417,756	639	\$ 22,996	\$ 73,819	4,017	\$ 198,005	\$ 654,669
Missouri	2,863	\$ 177,326	\$ 697,185	2,533	\$ 137,908	\$ 461,514	2,892	\$ 121,941	\$ 369,112	8,288	\$ 437,176	\$ 1,527,811
Montana	243	\$ 12,246	\$ 42,298	182	\$ 8,209	\$ 34,604	172	\$ 6,032	\$ 19,133	597	\$ 26,487	\$ 96,036
Nebraska	861	\$ 47,270	\$ 189,274	1,186	\$ 64,000	\$ 257,359	706	\$ 27,799	\$ 84,039	2,753	\$ 139,069	\$ 530,673
Nevada	473	\$ 32,231	\$ 107,689	245	\$ 14,949	\$ 48,482	451	\$ 20,095	\$ 58,847	1,169	\$ 67,275	\$ 215,018
New Hampshire	691	\$ 48,688	\$ 154,185	368	\$ 20,957	\$ 56,134	835	\$ 37,462	\$ 104,319	1,894	\$ 107,107	\$ 314,638
New Jersey	5,695	\$ 463,697	\$ 1,614,557	3,154	\$ 222,046	\$ 606,992	7,406	\$ 425,604	\$ 1,254,434	16,255	\$ 1,111,347	\$ 3,475,984
New Mexico	447	\$ 29,765	\$ 110,564	321	\$ 18,867	\$ 56,588	426	\$ 16,073	\$ 48,552	1,194	\$ 64,705	\$ 215,705
New York	7,413	\$ 523,705	\$ 1,878,547	4,520	\$ 326,393	\$ 901,924	8,477	\$ 529,696	\$ 1,446,268	20,410	\$ 1,379,793	\$ 4,226,739
North Carolina	4,702	\$ 241,556	\$ 903,096	5,494	\$ 312,583	\$ 896,829	5,027	\$ 214,161	\$ 648,220	15,223	\$ 768,300	\$ 2,448,144
North Dakota	158	\$ 9,871	\$ 41,662	179	\$ 7,904	\$ 43,144	86	\$ 3,208	\$ 9,472	423	\$ 20,983	\$ 94,278
Ohio	7,182	\$ 453,394	\$ 1,662,635	5,328	\$ 287,998	\$ 890,825	9,953	\$ 416,266	\$ 1,284,070	22,463	\$ 1,157,657	\$ 3,837,530
Oklahoma	1,092	\$ 56,173	\$ 220,869	1,360	\$ 71,317	\$ 285,187	974	\$ 38,280	\$ 121,625	3,426	\$ 165,770	\$ 627,681
Oregon	2,090	\$ 140,507	\$ 473,750	1,553	\$ 83,110	\$ 240,971	3,121	\$ 129,396	\$ 394,464	6,764	\$ 353,013	\$ 1,109,194
Pennsylvania	6,487	\$ 440,777	\$ 1,641,160	4,595	\$ 297,223	\$ 877,350	8,232	\$ 399,400	\$ 1,208,442	19,314	\$ 1,137,400	\$ 3,728,951
Rhode Island	441	\$ 30,299	\$ 113,568	187	\$ 10,485	\$ 28,262	398	\$ 18,449	\$ 51,911	1,026	\$ 59,232	\$ 193,741
South Carolina	2,181	\$ 184,735	\$ 604,646	1,972	\$ 103,612	\$ 310,616	3,601	\$ 128,965	\$ 393,228	7,754	\$ 417,312	\$ 1,308,490
South Dakota	205	\$ 7,807	\$ 26,912	215	\$ 8,865	\$ 43,138	94	\$ 3,474	\$ 10,664	514	\$ 20,146	\$ 80,714
Tennessee	3,325	\$ 246,912	\$ 884,165	3,375	\$ 194,318	\$ 601,124	5,445	\$ 248,600	\$ 739,876	12,145	\$ 689,829	\$ 2,225,164
Texas	11,665	\$ 867,019	\$ 3,053,783	12,450	\$ 781,921	\$ 2,605,382	19,595	\$ 961,355	\$ 3,059,596	43,710	\$ 2,610,295	\$ 8,718,761
Utah	1,301	\$ 104,030	\$ 516,079	2,038	\$ 99,591	\$ 318,406	2,808	\$ 105,446	\$ 340,630	6,147	\$ 309,067	\$ 1,175,116
Vermont	258	\$ 13,641	\$ 44,530	143	\$ 7,489	\$ 31,812	230	\$ 9,203	\$ 26,287	631	\$ 30,153	\$ 102,629
Virginia	2,546	\$ 159,283	\$ 612,760	2,506	\$ 175,164	\$ 465,924	2,133	\$ 98,491	\$ 299,305	7,185	\$ 432,938	\$ 1,377,989
Washington	2,592	\$ 249,286	\$ 861,761	2,447	\$ 158,752	\$ 486,075	4,695	\$ 224,789	\$ 718,077	9,734	\$ 632,826	\$ 2,065,913
West Virginia	712	\$ 34,554	\$ 116,188	527	\$ 44,357	\$ 112,364	477	\$ 17,648	\$ 53,115	1,716	\$ 96,559	\$ 281,667
Wisconsin	3,331	\$ 220,005	\$ 1,007,896	3,243	\$ 173,690	\$ 533,182	5,011	\$ 202,895	\$ 628,806	11,595	\$ 596,590	\$ 2,169,883
Wyoming	150	\$ 7,426	\$ 24,406	128	\$ 15,917	\$ 43,996	68	\$ 2,438	\$ 7,833	346	\$ 25,781	\$ 76,235
<b>Total</b>	<b>137,970</b>	<b>\$ 9,586,200</b>	<b>\$ 34,691,383</b>	<b>131,917</b>	<b>\$ 7,948,416</b>	<b>\$ 24,366,919</b>	<b>193,053</b>	<b>\$ 9,265,541</b>	<b>\$ 28,337,884</b>	<b>462,940</b>	<b>\$ 26,800,156</b>	<b>\$ 87,396,186</b>

John Dunham and Associates: New York

The study also calculated the impact of the U.S.-based scrap recycling industry on a state by state basis (as well as by state legislative district). The table of the preceding page summarizes those impacts. Specific tables – by state, congressional district and state legislative district -- can be found at [www.isri.org/jobs](http://www.isri.org/jobs).

<sup>11</sup> *Jobs Supported by Exports 2012: An Update*; February 26, 2013, International Trade Association. Available on-line at: [http://www.trade.gov/mas/ian/build/groups/public/@tg\\_ian/documents/webcontent/tg\\_ian\\_004021.pdf](http://www.trade.gov/mas/ian/build/groups/public/@tg_ian/documents/webcontent/tg_ian_004021.pdf)

<sup>12</sup> *International Trade Administration*, ITA News Letters. Available on-line at: [http://trade.gov/press/publications/newsletters/ita\\_0210/nei\\_0210.asp](http://trade.gov/press/publications/newsletters/ita_0210/nei_0210.asp)



## Study Methodology

The Scrap Recycling Industry Economic Impact Study estimates the economic contributions made by the various components of the scrap processing industry to the U.S. economy in 2013. John Dunham and Associates conducted this research, which was funded by the Institute of Scrap Recycling Industries, Inc. (ISRI). This work used standard econometric models maintained by the Minnesota IMPLAN Group. Data came from industry sources, government publications and Dun and Bradstreet, Inc. (D&B).

The study defines the scrap recycling industry as firms in the private sector involved in the processing and brokerage of scrap metals, plastics, rubber, paper, textiles, glass and electronics. The study measures the number of jobs in the sector, the wages paid to employees, the value added and total output.

The study also estimates taxes paid by the industry and its employees. Federal taxes include industry-specific excise and sales taxes, business and personal income taxes, FICA and unemployment insurance. State and local tax systems vary widely. Direct retail taxes include state and local sales taxes, license fees, and applicable gross receipt taxes. Processors pay real estate and personal property taxes, business income taxes and other business levies that vary in each state and municipality. All entities engaged in business activity generated by the industry pay similar taxes.

The economic impact study begins with an accounting of the direct employment in the processing of recycled scrap materials and the materials brokerage sectors. The data come from a variety of government and private sources. It is sometimes mistakenly thought that initial spending accounts for all of the impact of an economic activity or a product. For example, at first glance it may appear that consumer expenditures for a product are the sum total of the impact on the local economy. However, one economic activity always leads to a ripple effect whereby other sectors and industries benefit from this initial spending. This inter-industry effect of an economic activity can be assessed using multipliers from regional input-output models.

Industries are linked to each other when one industry buys from another to produce its own products. Each industry in turn makes purchases from a different mix of other industries, and so on. Employees in all industries extend the economic impact when they spend their earnings. Thus, economic activity started by the scrap recycling is linked to other industries in the state and national economies. The activities required to process a ton of scrap iron; from sorting, to cutting to baling, to shipping, generate the direct effects on the economy. Regional (or indirect) impacts occur when these activities require purchases of goods and services, such as machinery or electricity, from local or regional suppliers. Additional induced impacts occur when workers involved in direct and indirect activities spend their wages. The ratio between induced economic and direct impact is termed the multiplier. The framework in the chart above illustrates these linkages.

Once the direct impact of the industry has been calculated, the impact of supplier firms, and the “Induced Impact” of the re-spending by employees of industry and supplier firms, is calculated using an input/output model of the United States. The study calculates the impact on a national basis, by state, by congressional district and by state legislative district.

This method of analysis allows the impact of local production activities to be quantified in terms of final demand, earnings, and employment in the states and the nation as a whole. In the case of the ISRI model, only the most conservative estimate of the induced impact has been used.

Additional detail on the methodology used for this study can be found in [www.isri.org/jobs](http://www.isri.org/jobs).