Goodwill® Industries of Monocacy Valley, Inc.

Vital Signs

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Forward

During the past five years, I have had the opportunity to participate in and contribute to many different assessments of community need. It has been my pleasure to help guide Goodwill® Industries of Monocacy Valley, Inc. through this comprehensive Community Needs Assessment over the past six months. Thanks to the leadership and strategic vision of Goodwill's Board of Directors, this needs assessment comprises the thoughtful input of individuals from all corners of the two-county area we serve and at all levels in the community. Within these pages you will find both direct and summarized input from industry leaders and from the Goodwill® clients who have come in our doors seeking "a hand up, not a hand out." You will hear from case managers, local business leaders, current and past board members, donated goods donors, nonprofit executive directors, and the heads of social service agencies. I want to personally thank everyone who contributed to this process and particularly those who participated in the surveys, interviews and focus groups, for your time and invaluable insight into the needs of the Frederick and Carroll County workforce. Without your contributions, we could not have compiled such a comprehensive overview of where we are and where we might go as a human services organization. Our intention is that the information contained in this document will serve as a guide for Goodwill's leadership as well as the community-at-large.

Daniel J. Kurtenbach

Dan Kurtenbach
President/CEO

Acknowledgements

The Goodwill® Community Needs Assessment was completed with the assistance of many individuals. We are grateful and wish to acknowledge the contributions of all the individuals who have been involved in the development of the 2009 Community Needs Assessment.

- The Goodwill® Board of Directors for their recognition of the need for this project and for their support
- All of the survey respondents who took the time to provide very valuable data
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- Sharon Hodges, Executive Assistant to the President/CEO, for shepherding the information flow to the community, board and staff
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- David Porton, Goodwill® Industries International, for the creation of the customized census data reports and surveys
- Pat Simons and Shirley Richardson, who conducted the one-on-one interviews with the clients
- Gretchen Evans, Goodwill® Industries International, for facilitating our strategic planning process

Major Findings

Between November 28’ 2008 and January 2, 2009, Goodwill® conducted a Community Needs Assessment Stakeholder Survey in conjunction with the Member Services Center of Goodwill® Industries International, Inc. This project served as part of the Member Services Center’s new Community Needs Assessment Toolkit and employed a standardized survey instrument administered via online response. The survey sample was generated through a selection process that chose specific individuals to broadly represent the stakeholders, workforce development professionals, elected leaders and funders in the member’s territory. The purpose of this survey was to identify, at the community level, perceptions of needed services, perceptions of employment conditions, and perceptions of Goodwill®. The survey also sought to identify differences in perceptions based on the respondent’s association with Goodwill® (e.g. stakeholder, elected official, etc.). A total of 383 individuals responded (3,332 people were given the survey) to the survey for a basic response rate of 11.4 percent.

Goodwill® Industries of Monocacy Valley, Inc. is one of 207 autonomous Goodwill® organizations globally and is part of the Goodwill® Industries International (GII) network. Goodwill® serves Frederick and Carroll Counties in central Maryland. Goodwill® is an independent 501(c) (3) non-profit corporation governed by a local, volunteer Board of Directors. Dan Kurtenbach is the President and Chief Executive Officer. This Community Needs Assessment was initiated to determine the employment needs, training services needs, education needs and supportive services needs of the communities served by Goodwill®. It provides a comprehensive look at existing programs offered by Goodwill®, identifies potential programs and service gaps, and outlines some strategies for future programs that may serve to fill these gaps. This needs assessment includes primary data in the form of survey results, focus group results and personal interview results as well as secondary data in the form of demographics, economic data and employment data. The assessment is intended for use by the Goodwill® Board of Directors and Staff as they plan for future services and for the investment of Goodwill® resources in the community, and may also be useful to others interested in the planning and implementation of employment-related services.

The Goodwill® Community Needs Assessment identified a number of areas in which Goodwill® could provide new services and/or serve new populations. It has also identified many areas where Goodwill® is already providing services and may want to consider providing more of the same services. The Community Needs Assessment also identified areas of services needed in the community that may be more appropriately provided by other agencies or by Goodwill® partner agencies. There are also findings and suggestions related to Goodwill® current services that could improve those current services. This summary offered general areas for consideration to be used for strategic planning purposes and is not intended to identify specific programs for consideration, but rather general direction for what Goodwill® may want to consider based on the findings.

- The inclusion of retail donors in the survey sample pool created difficulty in assessing the overall rating of survey items.
- Stakeholder groups in Goodwill's territory appear to have fairly divergent opinions and perceptions.
- The top social issues among the groups are Alcohol/Drug Use, Homelessness, Educational Quality, Family/Domestic Violence, Economic Development, and Available Healthcare.
- The highest concern regarding populations with disadvantages among the groups is divided among Working Poor, Single Parents, At-Risk Youth, Non-English Speaking Residents, and Unemployed/ Dislocated Workers.
- The highest concern regarding populations with disabilities among the groups is divided among Psychiatric or Emotional Disability, Learning Disability, Developmental Disability, and Chemical Dependency.
- The lack of employment opportunities is seen as a major barrier to employment in the area; however most of the major stakeholder groups actually focus their attention on other issues.
- Most stakeholders see room for improvement in the availability of services in the area.
- Most stakeholders are ambivalent about the general availability of jobs in the area.
- Goodwill® enjoys strong name recognition. However, most of the retail donors do not know the true mission of Goodwill®. Other stakeholder groups do appear to be familiar the Goodwill's mission.

Executive Summary

Goodwill® Industries of Monocacy Valley is one of 207 autonomous Goodwill® organizations in North America. Goodwill® serves Frederick and Carroll Counties in central Maryland and is a 501(c) 3 non-profit organization governed by a local, volunteer Board of Directors. This community needs assessment was initiated to determine the employment needs, training service needs, education needs and supportive services needs of the communities served by Goodwill®. It provides a comprehensive look at existing programs offered by Goodwill®, identifies potential programs and service gaps, and outlines some initiatives for future programs that may serve to fill these gaps. This needs assessment includes primary data in the form of survey results, focus group results and personal interview results as well as secondary data in the form of demographics, economic data and employment data. The assessment is intended for use by the staff and support by the Board of Directors as the staff plans for the future services and for the investment of Goodwill® resources in Frederick and Carroll Counties. It may be useful to others interested in the planning and implementation of employment-related services.

The needs assessment identified a number of areas in which Goodwill® could provide new services and/or serve new populations. It has also identified may areas where Goodwill® is already providing services and may want to consider providing more of the same services. The needs assessment also identified areas of services needed in the community that may be more appropriate to be provided by other agencies or by Goodwill® partner agencies. There are also findings and suggestions related to Goodwill's current services that could improve those current services. This summary provided general areas for consideration to be used for strategic planning purposes and is not intended to offer specific programs for consideration, but rather general direction for what Goodwill® may want to consider based on the findings. (this section same verbiage as major findings?)

The following offers various initiatives for consideration:

Job Training and Employment Services

Current Efforts

- Expand the training locations
- Expand computer classes to more locations
- Offer employment soft skills
- Use BAC(?) process to support current and future programs
- Planning to initiate transitional jobs in Business Development and Retail Operations
- Develop programs to support Ft. Detrick job needs
- DDA clients offered specific transitional services for employment in the community

Initiatives for Consideration

- Adding more staff assistance or partnerships to provide more one-on-one services
- Offer more advanced computer training and offer evening and weekend classes
- Expand the amount of soft skills training offered and consider offering more and longer intensive workshops
- Broaden the employer participation in the review and refinement of the soft skills curriculum to include BACs
- Combine the soft skills into a "real work" setting through a transitional jobs program
- Develop and implement specialized soft skills curriculum for special populations
- Develop new job skills training programs to train for Ft. Detrick and other specialized jobs
- Explore the possibility to provide GED preparation classes on-site

- Provide English classes for speakers of other languages
- Expand specialized services to ex-offenders
- Provide more extensive job coaching and post-placement services to those that have received a job
- Hire job retention staff to support job coaching and post-employment
- Shift focus with job seekers to emphasize high demand jobs and educate them on the necessary skills to get those jobs
- Develop job soft skills and job placement services specifically for older workers

Support Services

Current Efforts

- Provide transportation support for all DDA and a limited number of others
- Provide vehicles through Vehicles For Change to eligible people
- On-site ex-offender computer software skills training
- Agency-partnership program through the distribution of C.A.R.E.S. certificates

Initiatives for Consideration

- Add transportation services for those need training at Goodwill®
- Consider the addition of on-site daycare for program participants
- Expand program partnership
- Increase staff knowledge of housing, credit counseling, day care and other issues affecting employment
- Develop a formal tutoring/mentoring program for ex-offenders

Business Services and Business Partnerships

Current Efforts

- Partner with business, individuals and government to provide custodial and power washing services
- Partner with businesses to meet DBE (Disadvantaged Business Enterprise) requirements

Initiatives for Consideration

- Expand power washing and site-clean-up services
- Utilize transitional jobs as means to provide training
- Create more business/employer contact opportunities
- Pursue more business partnerships through DBE program
- Pursue business partnerships where Goodwill® provides training for the employer
- Increase level of partnering with economic development sector and businesses
- Increase staff resources to increase business knowledge of Goodwill® through a formal plan and strategy

Summary of Recommendations

Recommendations for investment of Goodwill® Resources

1. Enhance Goodwill® Workforce Development Programs – Investment of resources in additional staff and resources to improve the quality of the DDA and DORS programs creating comprehensive support programs for community employment.
    a. **Soft Skills Training** – Increase the capacity of Goodwill® to provide "soft skills" employment training to individuals from a variety of backgrounds, ethnic groups and age groups by hiring/soliciting volunteers and customizing curriculum to meet the needs of specific populations
    b. **Support Services** – Increase the availability of identified support services to all job seekers and those wishing to increase current job skills. This includes childcare, transportation, housing, counseling, substance abuse services, training for life. Services should be provided through partnerships with other organizations that are the experts in the specific area such as Vehicles For Change.
    c. **Education Programs** – Investment in educational programs that enhance job-seeking and job-advancement efforts such as GED preparation programs and English classes for speakers of other languages with additional staff or partner staff to provide these services.
2. **Offer More Job-Specific Skills Training –** Investment of resources to create job specific skills training in partnership with Ft. Detrick and the business community to address the needs of the "high growth" industries.
3. **Pursue New Business Opportunities –** Investment of resources to create start-up funding for new business ventures, expand current custodial and power washing services, and business services that offer higher revenue.

In addition to the three major recommendations, this needs assessment indicated a resounding message that there needs to be an investment of resources in the branding (marketing) of Goodwill® - mission programs

Findings in Depth

The survey sought to gather responses from several distinct stakeholder groups. Working on behalf of Goodwill® Industries of Monocacy Valley, Inc. an electronic perception survey was administrated by Goodwill® Industries International. The data was garnered and analysis to support the findings in this community needs assessment. Supporting data was obtained through focus groups and interviews with community leaders.

Confidentiality concerns prevent the reporting of results for all for the various groups or localities, due to some of the low response counts in the various groups. In order to provide meaningful group contrasts, the remainder of this report will consider only the following collapsed groups:

- Goodwill® Personnel (consists of Current and Past Board Members, as well as Senior Staff)
- Retail Donors
- Business Representatives (consists of Business Dev., Nonprofit, and Funders) (NOTE: This category is technically too small for accurate results and is only presented in the interest of full disclosure.)
- Community Advocates (Legislative Delegates and Community Advocates)
- Service Providers

Stakeholder Group Response	
	Response Count
Current Board Member	11
Past Board Member	5
Senior Staff	8
Retail Donor	286
Business Development	3
Non Profit	18
Funder	2
Legislative Delegate	1
County Commissioner	0
Community Advocate	5
Frederick Community	19
Service Provider	25
Total	383

Locality Response	
	Response Count
Aberdeen	1
Carroll County	18
Frederick	26
Frederick City	1
Frederick County	332
Hagerstown	1
Region	2
Statewide	0
Westminster	2
Total	383

The same concern also impacts the reporting of contrasts based on locality information. In order to provide meaningful group contrasts, the remainder of this report will consider only the following collapsed groups.

- Frederick County (consists of all respondents associated with Frederick, Frederick City, and Frederick County)

- Carroll County (NOTE: this category is technically too small for accurate results and is only presented in the interest of full disclosure.
- All others (consists of all respondents associated with Aberdeen, Hagerstown, and other areas) (NOTE: This category is technically too small for accurate results and is only presented in the interest of full disclosure.

A serious concern to the representative value of these results is the tremendous number of retail donors making up the survey response pool. Since the vast majority of these respondents also come from Frederick County, the aggregate values and opinions expressed in this report will by driven, for the most part, by the responses of the retail group. Unfortunately, this group also tallied the lowest response rate of any stakeholder group in the survey; therefore, the data reported for this group itself may not be very useful for assessing the group's opinions and attitudes. The typical impact of this result will be to create a low degree of differentiation in the survey-wide totals; in other words, the overall distribution will likely have very little meaning. In general, the perceptions and policy opinions of the remaining stakeholder groups are likely to be the best indicators of community need.

Perceptions of Social Issues Facing Goodwill®

The first area covered by the survey asked respondents to identify the top three social issues facing the community. The logic guiding the inclusion of this topic suggests that the identified social issues will influence the entire service delivery environment. The table below lists both the overall and stakeholder sub-group distributions.
As expected, the overall distribution provides little guidance as to the major social issues facing the area. With only six percentage points separating the top eight overall choices, it is practically pointless to discuss survey-wide perceptions of social problems.[1] This result is due to the low level of differentiation among the retail donor respondents and the varying foci of the remaining groups. Among retail donors, only 10 percentage points separate the top eight choices; when this combines with the selections of the other groups in the survey, it produces the leveling effect seen in the overall rankings.

Among the remaining groups in the survey, an interest pattern appears. Goodwill® Personnel and Community Advocates tend to hold similar views regarding the social issues facing the area. Conversely, Business Representatives and Service Providers tend to group together on their perceptions of social issues facing the area. Goodwill® Personnel and Community Advocates highlight Economic Development and Family/Domestic Violence as major concerns, with additional concern placed on Transportation, Alcohol/Drug Use and Juvenile Crime. In contrast, Business Representatives and Service Providers focus on Homelessness and Alcohol/Drug Use with addition concern placed on Healthcare and Transportation.

An additional interesting result from the consideration of social issues is the fairly low proportion of individuals citing economic development despite the current economic

[1] In a convenience sample survey such as this project, the rule of thumb is that differences of 10 percentage points are substantial and have meaning. For instance, if the top two choices are separated by only 5 percentage points, even though one has a higher score than the other, the two should be considered relatively equal.

crisis. For most individuals, the term "economic development" resonates as a synonym for economic opportunity. While it is true that Maryland maintains a significantly lower unemployment than the nation as whole, economic conditions, as measured by unemployment in Maryland, have substantially declined over the past year. It seems likely that continued economic recession will lead to more serious joblessness even in Maryland, and that Goodwill® should be prepared to address the public's needs for assistance with job transition and placement.

A major point of concern for Goodwill® should be the disparate range of concerns that stakeholders address. If anything is clear from the results of the section, it is that the various constituencies Goodwill® must address have fairly different goals and concerns regarding the issues that face the community. As such, Goodwill® has an opportunity to build consensus around the social issues facing the area as it moves forward with new programs and opportunities.

Perceptions of Social Issues

	Total	Goodwill® Personnel	Retail Donors	Business Representatives	Community Advocates	Service Providers	Frederick County	Carroll County	All Others
	383	24	286	23	25	25	357	18	8
Alcohol/Drug Use	28%	29%	27%	35%	20%	44%	27%	50%	38%
Homelessness	27%	17%	24%	52%	24%	52%	28%	17%	25%
Educational Quality	27%	21%	30%	17%	20%	4%	27%	28%	25%
Family/Domestic Violence	27%	37%	25%	26%	44%	20%	27%	17%	25%
Economic Development	27%	46%	27%	13%	40%	8%	28%	22%	13%
Available Healthcare	26%	21%	24%	43%	24%	36%	25%	33%	25%
Transportation	23%	29%	20%	17%	40%	48%	23%	28%	25%
Juvenile Crime	22%	25%	23%	13%	32%	8%	23%	17%	13%
Public Safety	16%	8%	18%	9%	20%	8%	17%	11%	12%
Hunger	15%	21%	16%	9%	8%	8%	15%	11%	0%
Quality of Life	14%	21%	15%	4%	8%	12%	14%	22%	13%
Child Abuse	13%	4%	16%	13%	4%	4%	14%	11%	0%
Other	9%	8%	8%	13%	12%	12%	9%	0%	25%
Literacy	8%	13%	8%	9%	0%	12%	8%	17%	0%
Emergency Preparedness	8%	0%	9%	0%	4%	4%	8%	0%	12%

Note: Cell values represent the percent of respondents selecting the item.

Perceptions of Populations with Disabilities and Disadvantages

The survey asked respondents to identify the top three populations that are most in need of services and those that were growing the fastest, dividing the focus between populations with disadvantaging conditions and those with disabilities. Unlike the low level of differentiation seen in perceptions of social issues, respondents generally agree on which populations are most salient, leading to consensus rankings.

Perceptions of Populations with Disadvantages

	Total	Goodwill® Personnel	Retail Donors	Business Representatives	Community Advocates	Service Providers	Frederick County	Carroll County	All Others
	383	24	286	23	25	25	357	18	8
Service Need									
Working Poor	55%	58%	55%	61%	56%	44%	57%	39%	25%
Single parents	47%	50%	51%	30%	32%	32%	48%	44%	25%
At-Risk Youth	46%	54%	44%	43%	64%	40%	45%	67%	38%
Unemployed/ Dislocated Workers	40%	25%	41%	22%	44%	60%	40%	44%	38%
Homeless	33%	25%	31%	52%	28%	40%	33%	22%	25%
Older Workers (over 55)	23%	17%	27%	9%	16%	12%	22%	50%	25%
Non-English Speaking Residents	17%	21%	15%	26%	28%	12%	17%	11%	13%
Immigrants	11%	13%	11%	17%	8%	8%	11%	11%	0%
Ex-Offenders	7%	21%	5%	4%	4%	20%	6%	6%	25%
Welfare Recipients	7%	13%	6%	13%	0%	16%	6%	11%	25%
Other	3%	4%	2%	9%	4%	12%	3%	0%	25%
Growth Rate									
Non-English Speaking Residents	44%	58%	40%	48%	68%	44%	45%	22%	25%
Unemployed/ Dislocated Workers	44%	42%	45%	13%	48%	48%	41%	72%	75%
Working Poor	44%	50%	45%	35%	32%	44%	45%	39%	38%
At-Risk Youth	32%	33%	33%	43%	36%	12%	32%	44%	13%
Immigrants	32%	29%	31%	52%	36%	24%	33%	17%	25%
Single parents	32%	25%	35%	17%	16%	32%	32%	33%	38%
Homeless	25%	21%	20%	61%	24%	44%	25%	22%	13%
Older Workers (over 55)	13%	8%	14%	4%	12%	20%	12%	33%	25%
Welfare Recipients	11%	0%	13%	9%	8%	8%	12%	6%	0%
Ex-Offenders	5%	25%	3%	0%	0%	16%	5%	0%	12%
Other	3%	4%	3%	9%	4%	4%	3%	0%	13%

Note: Cell values represent the percent of respondents selecting the item.

In the case of populations with disadvantaging conditions, the economic downturn reveals its impact by drawing the attention of the respondents to the economically disadvantaged. Most stakeholder groups cite the Working Poor as the class that is most in need of services. Additionally, stakeholders focus on Single Parents, At Risk Youth, and the Unemployed. A review of the actual percentages of respondents selecting the various classes reveals that Goodwill® Personnel, Retail Donors, and Business Representative are most focused on the Working Poor and that Single Parents, At-Risk Youth and the Unemployed form a distant second set of concerns. Conversely, Community Advocates and Service Providers tend to focus on At-Risk Youth and the Unemployed with Working Poor and Single Parents as a distant second set of concerns.

The picture shifts slightly when respondents are asked to consider which groups are growing fastest. First, retail donors show much less consistency in their answers, so the level of differentiation decreases. At the same time, the remaining stakeholder groups slightly shift their foci. Across all the stakeholder groups, respondents express elevated levels of concern regarding Non-English Speaking Residents, perhaps reflecting on-going immigration. Beyond this, Goodwill® Personnel and Retail Donors tend to focus on the Unemployed and the Working Poor while Business Representatives, Community Advocates, and Service Providers move to focusing on At-Risk Youth, Single Parents, Immigrants, and the Homeless.

In summary, respondent perceptions of populations with disadvantaging conditions are fairly consistent and refined.
Stakeholders tend to agree on the primacy of individuals with economic barriers of one form or another and see the need for resources to be allocated towards high risk groups.

Perceptions of Populations with Disabilities

	Total 383	Goodwill® Personnel 24	Retail Donors 286	Business Representatives 23	Community Advocates 25	Service Providers 25	Frederick County 357	Carroll County 18	All Others 8
Service Need									
Psychiatric or Emotional Disability	61%	62%	58%	70%	68%	84%	61%	61%	62%
Learning Disability	50%	54%	50%	43%	56%	44%	51%	56%	12%
Developmental Disability	49%	83%	45%	52%	64%	48%	50%	44%	38%
Chemical Dependency	38%	33%	37%	52%	32%	44%	37%	56%	50%
Other Physical Disability	24%	46%	25%	4%	4%	28%	24%	22%	12%
Deaf or Other Hearing Impairment	14%	8%	14%	17%	16%	16%	14%	6%	38%
Neurological Disability	13%	12%	14%	0%	12%	16%	13%	6%	0%
Blind or Other Visual Impairment	11%	0%	13%	4%	12%	4%	11%	11%	13%
HIV Positive/ AIDS	9%	0%	11%	9%	8%	0%	9%	11%	0%
Other	3%	0%	3%	0%	4%	4%	3%	0%	13%
Growth Rate									
Psychiatric or Emotional Disability	60%	79%	56%	65%	56%	92%	60%	61%	75%
Chemical Dependency	51%	46%	52%	57%	40%	56%	50%	83%	50%
Learning Disability	44%	58%	43%	57%	40%	36%	45%	50%	25%
Developmental Disability	35%	62%	32%	39%	36%	32%	36%	17%	13%
Other Physical Disability	22%	13%	24%	17%	0%	32%	22%	22%	25%
Deaf or Other Hearing Impairment	11%	17%	10%	9%	28%	8%	11%	6%	25%
HIV Positive/ AIDS	11%	0%	14%	4%	4%	8%	11%	28%	0%
Neurological Disability	11%	8%	10%	4%	12%	20%	11%	11%	0%
Other	4%	0%	5%	0%	4%	4%	4%	0%	0%
Blind or Other Visual Impairment	2%	0%	2%	4%	4%	0%	3%	0%	0%

Note: Cell values represent the percent of respondents selecting the item.

One interesting finding regarding perceptions of populations with disadvantaging conditions is the Business Representatives' consistent focus on the homeless. In keeping with their perceptions of homelessness as a major social issue facing the area, business representatives consistently cite the homeless as a group in need and growing quickly. As Goodwill® works with the business community, planners should keep in mind that the business community sees homelessness as a major problem in the area, especially since most Goodwill® Personnel do not place much emphasis on the issue when confronted with a range of issues and populations to consider.
In the case of populations with disabling conditions, respondents are very consistent in their views. Individuals with Psychological/Emotional disabilities receive the highest level of expressed concern across all stakeholder groups. Individuals with Learning Disabilities, Developmental Disabilities, and with Chemical Dependencies round out the other major areas of concern. It is important to note the degree of separation in selection rates between Psychological/Emotional and the other top choices; on average, the various stakeholder groups selected psychological/emotional over the other top choices by a margin of 11 percentage points. This high level of consistency and the degree of separation indicate a generalized concern about the population in the area.

Perceptions of Barriers to Employment

The survey asked respondents to select the top three barriers to employment, as with perceptions of social issues facing the area, the. However this agreement may be considered an illusory consensus at best. The remaining economically impacted views of the retail donors cause employment opportunities to rise to the top over the views of the remaining stakeholders. Stakeholder groups demonstrate vastly divergent concerns and focus their concern much more widely (as evidenced by the much smaller margins between their first tier choice and their second and third tier choices). For instance, Goodwill® Personnel focus most on Life Skill Training opportunities. In contrast, Business Representative and Community Advocates focus on limited Childcare support and Service Providers focus on limited Public Transportation. Each of these groups also selects employment opportunities as important concerns.

Perceptions of the Importance of Community Involvement

The survey also asked respondents to rate the degree to which they felt being involved in the community was desirable; as expected, few respondents diverged from the socially desirable positions. Furthermore, no stakeholder group's response distribution varied from any other's to such a degree as to be notable.

Perceptions of Barriers to Employment	Total 383	Goodwill® Personnel 24	Retail Donors 286	Business Representatives 23	Community Advocates 25	Service Providers 25	Frederick County 357	Carroll County 18	All Others 8
Limited Employment opportunities	46%	25%	49%	52%	32%	40%	46%	44%	62%
Limited Living Wage Opportunities	36%	29%	36%	39%	36%	40%	37%	28%	25%
Limited Childcare Options	33%	21%	33%	57%	40%	20%	34%	22%	25%
Limited Public Transportation	30%	29%	29%	35%	24%	44%	30%	33%	50%
Potential Loss of Healthcare Benefits/ Income Support	24%	21%	25%	22%	28%	20%	25%	22%	13%
Limited Work Skills Training Programs	23%	21%	24%	17%	24%	8%	23%	17%	13%
Limited Job Development	14%	4%	14%	22%	8%	12%	13%	28%	25%
Limited Skill Training	13%	25%	11%	13%	16%	20%	13%	17%	0%
Limited Educational Opportunities	10%	4%	11%	4%	8%	4%	10%	17%	0%
Limited Life skills Training Programs	10%	33%	8%	9%	16%	12%	11%	11%	0%
Limited Employment Placement Assistance	10%	17%	9%	4%	12%	12%	10%	6%	13%
Limited Job Accommodation	9%	13%	8%	9%	8%	24%	9%	6%	38%
Rigid Employer Pre-Employment Eligibility Requirements	8%	21%	6%	4%	12%	24%	8%	6%	12%
Limited Job Coaching	6%	17%	4%	4%	8%	16%	6%	6%	0%
Other	5%	0%	6%	4%	4%	0%	5%	0%	0%
Limited Eldercare Options	4%	8%	4%	0%	0%	0%	4%	6%	0%

Note: Cell values represent the percent of respondents selecting the item.

Perceived Importance of Community Involvement	Strong Belief Against	2	Neutral or No Opinion	4	Strong Belief For
To Be Registered to Vote	1%	1%	7%	8%	83%
To Make Financial Contributions to Non-Profit Agencies	0%	3%	31%	34%	31%
To Own Their Home	2%	6%	34%	30%	29%
To Complete High School	2%	0%	1%	8%	89%
To Complete College	1%	2%	19%	41%	37%
To Volunteer in the Community	0%	1%	18%	35%	46%

Note: Cell values represent the percent of respondents selecting the references level. Median categories are identified.

Perceptions of Service Availability

The survey asked respondents to rank a list of services based on their perceived availability to populations with disabilities and disadvantages. Overall, survey respondents indicate a moderate degree of cynicism with the availability of services as evidenced by clustering of medians around the middle point of the scales.[2] Areas that respondents identify as being of primary concern seem to focus on career advancement and support for individuals needing special consideration or services (such as case management and ex offender services.) Analysis of the responses of the different stakeholder groups reveals a broad consensus on the availability of the services.

Perceived Availability of Workforce Development Service in Frederick/Carroll Counties

	Complete Lack of Service	2	3	4	5	6	Perfect Availability
How to Get a Job - Job seeking skills instruction	3.7%	15.1%	25.9%	30.8%	15.4%	6.6%	2.6%
How to Keep a Job - Life skills training (communication, decision-making, stress management, organization, budgeting, etc.)	5.1%	24.0%	30.0%	24.0%	11.7%	4.3%	0.9%
Job Training in occupations of high demand and turnover (food service, retail, customer service, housekeeping, etc.)	4.1%	20.3%	27.2%	28.4%	13.3%	5.2%	1.4%
Job Development and Placement Services	2.6%	18.1%	27.3%	30.2%	13.8%	6.6%	1.4%
Job Coaching Services	6.1%	28.5%	28.5%	24.4%	7.8%	3.5%	1.2%
Case Management Services	4.1%	23.5%	25.6%	27.6%	13.1%	5.2%	0.9%
GED Preparation and Testing Services	2.3%	9.9%	20.7%	31.8%	16.9%	11.7%	6.7%
English as a Second Language (ESL) Services	3.4%	12.6%	21.5%	24.9%	17.8%	10.3%	9.5%
Re-entry Services for Ex-Offenders	5.4%	26.2%	28.9%	31.0%	4.5%	1.5%	2.4%
Charter School Education	9.6%	22.5%	24.3%	24.3%	11.7%	3.5%	4.1%
Veterans' Services	2.9%	16.1%	24.9%	32.3%	15.5%	5.0%	3.2%
Services for Migrant Workers	8.9%	26.8%	25.3%	23.2%	8.0%	3.6%	4.2%
Youth Services	4.1%	10.0%	26.7%	33.7%	17.6%	5.3%	2.6%
Public/Private Transportation Services	6.1%	23.1%	20.2%	28.8%	12.7%	6.6%	2.6%
Services for Seniors	3.8%	13.9%	18.6%	32.5%	18.8%	9.9%	2.6%
Computer and Software Training Services	3.2%	14.8%	22.7%	35.8%	15.1%	6.1%	2.3%
Housing for Homeless Persons	9.3%	29.1%	28.8%	22.7%	5.2%	3.5%	1.5%

[2] Recall that the scale for this particular question places the value "Perfect Availability" at the extreme positive end. Thus, any answer less than "prefect availability" indicates the perception of some from of lack or unavailability of the service. The clustering of the medians around the midpoints of the scale indicates that respondents, by and large, perceive a disconnect in service availability, but are not willing to stray too far into the realm of the extreme negative end of the scale.

Note: Cell values represent the percent of respondents selecting the references level of availability. Median categories are identified.

Employment Opportunities

The survey asked respondents to rank a series of occupational areas based upon their perceived growth. The purpose of this series was to identify potential growth areas that Goodwill® Industries could target by introducing training programs geared to place individuals in these occupations. Again, despite the clear economic downturn, when faced with actually rating the availability of specific jobs in the area, most respondents do not report seeing particularly egregious declines in job availability. Furthermore, respondents actually continue to see job growth opportunities in the fields of healthcare and biosciences in the area. One area that does warrant special consideration is the stakeholders' perception of jobs is in the aerospace/defense industries. Given that the I-270 corridor has been billed as the "Technological Corridor," and that aerospace/defense occupations have figured strongly in the past in this area, the perceived decline may indicate a true shift in the importance of jobs in this industry in this area.
In understanding these results it is very important to remember that most respondents only represent the typical resident of the area (retail donors) and not individuals such as business persons or service delivery agents, who might have a better grip on the availability of jobs. Most of the impressions reported here are likely to be driven by personal experiences and local news coverage. As such the actual employment outlook for the area is likely to be more grim.

Analysis of the responses of the different stakeholder groups reveals a broad consensus on the availability of various jobs. No stakeholder group's distribution varied significantly from the remaining groups.

Goodwill® Image and Brand Recognition

Finally, the survey included an optional module covering respondent familiarity with and perceptions of Goodwill® Industries of Monocacy Valley. It is generally recommended that local Goodwill® members conduct regular stakeholder, client and community brand awareness and satisfaction surveys. However, the stakeholder perception survey does offer a resource-friendly opportunity to assess these concepts.
While the reported level of awareness may be inflated in this type of survey (since Goodwill® is mentioned earlier in the survey instrument), the results still serve as a good indicator of the direction of effort local marketing strategies should consider. Goodwill® Industries of Monocacy Valley appears to enjoy significant name recognition. Across all but one of the stakeholder groups, Goodwill® is rated highest in terms of recognition.

The second component of the module asks respondents to identify the primary mission of Goodwill®. In general, it appears that most survey respondents do not know the mission of Goodwill®.

	No Employment Opportunities in this Field	Decreasing Employment Opportunities	2	No Change	3	Increasing Employment Opportunities
Agricultural Occupations	2.3%	24.3%	31.4%	28.5%	10.7%	2.8%
Construction Occupations	0.0%	23.5%	31.4%	21.2%	19.5%	4.2%
Installation, Maintenance, and Repair Occupations	0.9%	7.1%	17.4%	42.2%	27.1%	5.4%
Production/Manufacturing Occupations	4.8%	15.2%	31.8%	34.1%	13.0%	1.1%
Transportation and Trucking Occupations	2.0%	5.4%	23.1%	47.1%	18.9%	3.4%
Sales Occupations	0.8%	7.3%	21.5%	38.1%	24.3%	7.9%
Office and Administrative Support Occupations	1.1%	6.6%	18.1%	46.4%	25.5%	2.3%
Food Service Related Occupations	0.3%	3.4%	12.5%	43.6%	32.5%	7.7%
Healthcare Occupations	0.9%	3.4%	8.8%	36.6%	35.8%	14.5%
Management Occupations	1.4%	7.1%	26.3%	44.1%	19.2%	2.0%
Janitorial/Custodial Occupations	0.3%	3.4%	13.1%	55.1%	25.1%	2.9%
Aerospace/Defense Occupations	15.9%	11.8%	16.4%	35.9%	16.2%	3.8%
Information Technology/Software Occupations	3.9%	7.3%	12.4%	35.4%	32.9%	8.1%
Bioscience Occupations	7.9%	5.9%	11.0%	30.6%	30.1%	14.6%
Advanced Business Services Occupations	5.7%	7.4%	12.5%	50.7%	20.8%	2.8%
Other Occupations	4.1%	6.1%	17.4%	59.0%	11.3%	2.0%

Note: Cell values represent the percent of respondents selecting the referenced level. Median categories are identified.

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The second component of the module asks respondents to identify the primary mission of Goodwill®. In general, it appears that most survey respondents do not know the mission of Goodwill®.

The first component of the Image and Brand Recognition module asks survey respondents to identify national charities that work in the respondents' community and those that actually accept donated goods. The purpose of these questions is to identify the degree to which Goodwill® rises to the "top of **Goodwill® Brand Recognition**

	Total	Goodwill® Personnel	Retail Donors	Business Representatives	Community Advocates	Service Providers	Frederick County	Carroll County	All Others
	383	24	286	23	25	25	357	18	8
Working in the Community									
Goodwill® Industries	93%	100%	93%	83%	92%	96%	93%	94%	88%
Salvation Army	74%	92%	73%	61%	80%	76%	76%	44%	75%
American Red Cross	71%	87%	69%	74%	84%	60%	71%	89%	50%
United Way	53%	79%	44%	91%	80%	72%	52%	72%	75%
Local Church	50%	58%	50%	48%	44%	52%	50%	44%	50%
Purple Heart	32%	29%	35%	13%	20%	32%	32%	39%	12%
Planet Aid	13%	21%	13%	13%	8%	12%	13%	22%	0%
St. Vincent DePaul	10%	17%	8%	13%	8%	20%	10%	11%	0%
Other	7%	4%	4%	26%	8%	24%	7%	6%	25%
Volunteers of American	3%	0%	4%	0%	4%	4%	4%	0%	0%
Accepting Donations									
Goodwill® Industries	98%	100%	98%	91%	100%	100%	98%	100%	88%
Salvation Army	61%	75%	58%	61%	60%	84%	62%	39%	62%
Purple Heart	44%	46%	44%	35%	32%	64%	44%	50%	25%
Local Church	38%	42%	39%	22%	36%	36%	37%	44%	38%
Planet Aid	37%	58%	33%	39%	40%	52%	37%	39%	38%
American Red Cross	8%	21%	6%	4%	20%	12%	8%	6%	0%
St. Vincent DePaul	8%	8%	8%	9%	8%	4%	8%	11%	0%
Other	8%	4%	8%	9%	4%	12%	6%	17%	38%
United Way	3%	0%	3%	0%	4%	4%	3%	6%	12%
Volunteers of American	2%	4%	2%	0%	0%	0%	2%	0%	0%

Note: Cell values represent the percent of respondents selecting the item

Which statement below do you think best describes Goodwill's mission?

	Without Retail	
Donors		
Goodwill® trains people for jobs	43.6%	66.7%
Goodwill® operates discount retail or thrift stores	40.3	28.9
Goodwill® gives clothes to the needy	8.29	1.1
Goodwill® helps people who have been though a disaster.	7.73	3.3

In this case, however, it is very important to distinguish the response of the retail stakeholders from the remaining groups. It seems likely that retail donors would be most likely to confuse the mission, especially if they are only infrequent donors. Re-calculating the distribution based on all other stakeholder groups demonstrates that most community stakeholders do recognize the mission of Goodwill®, to provide job training and advancement services.

The final component of the module asks respondents a series of questions designed to assess the degree to which Goodwill's services exceed their expectations. These customer satisfaction questions should probably be considered as general indicators of the stakeholder satisfaction with Goodwill® rather than as specific areas for improvement.

Goodwill® Industries employment and training services....

Far Exceeds Expectations	4.4%	2.1%
Somewhat Exceed Expectations	12.0	23.7
Meet Expectations	32.9	40.2
Are Somewhat Disappointing	5.2	13.4
Are Very Disappointing	.5	1
Don't Know/ No Personal Experience	36.6	12.4

Goodwill® Industries customer service related to workforce & employment services...

Far Exceeds Expectations	5.2%	2.1%
Somewhat Exceeds Expectations	14.4	26.8
Meets Expectations	32.4	40.2
Is Somewhat Disappointing	5.5	9.3
Is Very Disappointing	.3	1
Don't Know/ No Personal Experience	34.2	13.4

Goodwill® Industries visible participation in our community...

Far Exceeds Expectations	9.7%	12.4%
Somewhat Exceeds Expectations	20.1	32
Meets Expectations	35.5	29.9
Is Somewhat Disappointing	14.1	14.4
Is Very Disappointing	1.6	
Don't Know/ No Personal Experience	11.2	4.1

The ease of communication with Goodwill® Industries

Far Exceeds Expectations	13.8%	17.5%
Somewhat Exceeds Expectations	18.5	25.8
Meets Expectations	38.4	36.1
Is Somewhat Disappointing	6	6.2
Is Very Disappointing	1	1
Don't Know/ No Personal Experience	14.4	6.2

Goodwill® Industries compliance with my organization's policies and procedures...

Far Exceeds Expectations	7.8%	8.2%
Somewhat Exceeds Expectations	9.1	20.6
Meets Expectations	28.5	26.8
Is Somewhat Disappointing	2.6	4.1
Is Very Disappointing	.5	1
Don't Know/ No Personal Experience	41.8	29.9

Did you know that the only way to donate clothing and household goods to Goodwill® is to visit one of our Retail Stores?

Yes	86.7%	80.4%
No	13.1	18.6

Ignoring for the moment the effect of the perceptions of retail donors on the results of the survey, it is clear that the major stakeholder groups in Goodwill's territory exhibit fairly large differences in policy priorities and perceptions of need. This presents an opportunity for Goodwill® to build consensus around its strategic goals and programs. Moving forward, Goodwill® clearly needs to do more to educate the general public regarding its mission and vision for program services in the area.

Focus Group Response

Goodwill® chose to conduct client focus groups as a part of its Community Needs Assessment to provide clients an opportunity to tell the agency what we do well, what we could improve upon and what services the clients would like us to offer that we do not currently provide to the community. Three focus groups were conducted by two volunteers who have volunteered for Goodwill® in other projects and have teaching backgrounds. One focus group was conducted with inmates at the Frederick County Work Release Center who had participated in one of Goodwill's computer classes offered at the center. Another focus group included participants in Goodwill's Day Vocational program for individuals with developmental disabilities. The third focus group included participants in various stages of service in Goodwill's Employment Services program focused on supporting individuals looking for a job. The following are the results of each focus group.

1. Frederick County Work Release Center Client Focus Group

Two main points were made by all of the inmates in the Frederick County Work Release Center providing feedback: they wanted more services than what Goodwill® currently offers to the inmates; and they did not feel that they knew what services Goodwill® could offer to them once released. They suggested that Goodwill® provide the inmates with brochures, material posted on the bulletin boards and a packet of information when they are close to their release date so they would be informed of Goodwill's services. All the inmates felt that their criminal background would be a barrier to employment once released. Some of the inmates also felt that the cost of programs would be a barrier to them and the times programs are offered if they are not able to attend during regular business hours because of their work schedule or other commitments. They also mentioned that they want program staff to treat them with respect and not judge them because of their past criminal history.

The inmates offered a number of suggestions of new programs/services that Goodwill® should consider offering:

- Guidance with life skill programs

- How to have fun without drug and alcohol use
- Transitional housing-structured to assist with developing tools that will allow participants to move forward in life and not return to a program
- Financial stability - assisting with getting out of debt (consumer credit counseling services)
- Linkage to medical and dental assistance and options available
- Access to prescriptions so that they would not turn to drug use when in pain and unable to afford prescriptions
- Planning release so they would have a job, food and/or shelter
- Less hiring restrictions for certain criminal backgrounds at Goodwill® itself
- Programs to improve reading skills
- Programs to learn English

2. Employment Services for Adults (with disabilities and without) Client Focus Group

The individuals interviewed that attended the Employment Services programs seemed to be satisfied with the location of services and their interaction with staff. They also stated that Goodwill® had focused on their employment goals, that the programs are good, and that they would need some extra supports to find a job. However, the majority of the people participating in the group had been in the program for a short period of time and to date had not found a job. The individuals interviewed also felt that access to free services whether it was help looking for a job or a certificate for clothing, was important to their ability to participate and be successful.

The people participating in this focus group also agreed that Goodwill® needed to do a better job of marketing its services to the community. They were concerned about being able to continue services after they became employed if Goodwill® did not offer a flexible training schedule. The participants offered the following suggestions of new programs/services that Goodwill® should consider offering:

- Basic internet/PC training
- Evening classes (if jobs with day time work hours come through)
- Help to search and apply for jobs online
- Assistance finding places to live
- Volunteer opportunities to help out others
- Directing people-being a resource to assist people to search for and access existing community programs

3. Services for Adults with Developmental Disabilities Client Focus Group

The individuals with developmental disabilities that participated in the focus group were very positive about the staff that works in the program. They had a concern about one staff's tone when interacting with them, but overall they described the program staff as "friendly", "responsible" and "fun". They also felt that they "fit in", were able to make friends and some would like to work at Goodwill® forever. They liked that transportation to and from the program is offered by Goodwill® and they felt confident that they would be picked up on time and that they would not be left behind as happens with public transportation. They seemed to have some concern about how early they had to be picked up by the bus and that the bus was too large to get down some of their driveways.

The individuals interviewed expressed some concerns about the physical conditions of their work area. They mentioned it being dusty and cold, with the door to the outside being left open often in the winter. They also mentioned the bathrooms being cold and dingy. The individuals mentioned the possibility of wheelchair ramps on the sidewalk and not having to have someone in a wheelchair get in and out of the bus in the gravel. They would also like to be able to shop in the store in which they work.

Individuals that were interested in working outside of Goodwill® someday felt that Goodwill® staff did not focus on their employment goals enough. They specifically mentioned getting more computer and phone skills. They also felt that staff needed to follow through faster to help them get enrolled in computer classes and workshops offered by the Employment Services staff and the Training Manager. These individuals believe transportation would be a huge issue for them if they worked outside of Goodwill® since the agency doesn't offer bus service to clients in community employment. They also mentioned that some of their physical health issues would probably get in the way of working for another employer.

Open-ended Survey Comments

1. Is coordination among service providers worth pursuing? If there is space on our buses, will other non profits in the area pay for these services?
2. Goodwill® has great programs and services -- but needs a higher visibility within the community with respect to the additional programs and services it provides.
3. Need some type of support services for people who are deaf
4. Have greater visibility in the community
5. I am not aware of what Goodwill® does with the proceeds from this store. It would be nice to see a display (maybe at checkout) showing where the proceeds are going.
6. Research home pickup for "mandatory" fee.
7. Goodwill® should start awareness campaign for "Planet Aid Box" property owner.
8. More programs for underemployed (Working poor)
9. Conduct neighborhood studies and determine where we focus our resources
10. Increase the amount of communication from Goodwill®
11. Goodwill® has strong name and brand recognition among those surveyed; however, even with this degree of strong branding, it is NOT clear WHAT the mission is and how we go about meeting it.
12. This public has not yet seen the extent of nor the intent for our organization's interest in creating and supporting partnerships with like-mission-ed organizations and groups in the communities we serve.

In summary, it is clear that there is much work to be done in the areas of marketing, public relations, continued and effective organizational branding and community outreach – some of which has already begun and needs to continue. Because funds are limited at this time, it becomes a "creative challenge" to devise strategies that can build upon current marketing momentum in cost-effective yet in compelling and direct ways.

This now forms the basis of the strategies being utilized during the 2009 anniversary year, while also capitalizing upon other ideas brought forth in the survey: by forming strong partnerships, by "getting the word out" in various ways and through a variety of means, by continuing to outreach to client, provider, donor, leadership, supporter, referral audiences, we hope to meet and even exceed the benchmarks set forth for achieving the creation and implementation of a successful marketing program for our Goodwill®.

Workforce Development Services

A. Gaps

1. Services for immigrants to include English as a Second Language classes and Job Placement Services.

2. Marketing services within the community so more people who need the services are familiar with what Goodwill® offers and can take advantage of the services.

3. Training specific to high growth industries outside of the community college system. It was suggested that this training be available to individuals with no income and to employed individuals that want to increase their wages/change jobs.

4. Perception that there is a growing population of individuals with mental health issues and a lack of services to help the population.

5. Transportation to services and/or jobs.

B. Improvements

1. Services to provide individuals with disabilities the opportunity to work in the community.

2. Marketing/outreach of available programs/services.

C. Other

1. Encourage Goodwill® to continue to work on person first language in the workplace and the concepts of self advocacy and self determination.

The needs assessment identified a number of areas in which Goodwill® could provide new services and/or serve new populations. It has also identified some areas where Goodwill® is already providing services and may want to consider providing more of the same services. The needs assessment also identified areas of service needed in the community that may be more appropriate to be provided by other agencies or by Goodwill® partner agencies. There are also findings and suggestions related to Goodwill's current services that could improve those current services. This summary provides general areas for consideration to be used for strategic planning purposes and is not intended to offer specific programs for consideration, but rather general direction for what Goodwill® may want to consider based on the findings.

Job Training and Employment Services

Current Efforts

- Expand the training locations
- Expand computer classes to more locations
- Offer employment soft skills
- Use BAC process to support current and future programs
- Planning to initiate transitional jobs in Business Development and Retail Operations
- Develop programs to support Ft. Detrick job needs
- DDA clients offered specific transitional services for employment in the community

Initiatives for Consideration

- Adding more staff assistance or partnerships to provide more one-on-one services
- Offer more advanced computer training and offer evening and weekend classes
- Expand the amount of soft skills training offered and consider offering more and longer intensive workshops
- Broaden the employer participation in the review and refinement of the soft skills curriculum to include BACs(spell out)
- Combine the soft skills into a "real work" setting through a transitional jobs program
- Develop and implement specialized soft skills curriculum for special populations
- Develop new job skills training programs to train for Ft. Detrick and other specialized jobs
- Explore the possibility to provide GED preparation classes on-site
- Provide English classes for speakers of other languages
- Expand specialized services to ex-offenders
- Provide more extensive job coaching and post-placement services to those that have received a job
- Hire job retention staff to support job coaching and post-employment

- Shift focus with job seekers to emphasize high demand jobs and educate them on the necessary skills to get those jobs
- Develop job soft skills and job placement services specifically for older workers

Support Services

Current Efforts

- Provide transportation support for all DDA and a limited number of others
- Provide vehicles through Vehicles For Change to eligible people
- On-site ex-offender computer software skills training
- Agency-partnership program through the distribution of C.A.R.E.S. certificates

Initiatives for Consideration

- Add transportation services for who need training at Goodwill®
- Consider the addition of on-site daycare for program participants
- Expand program partnership
- Increase staff knowledge of housing, credit counseling, day care and other issues affecting employment
- Develop a formal tutoring/mentoring program for ex-offenders

Business Services and Business Partnerships

Current Efforts

- Partner with business, individuals and government to provide custodial and power washing services
- Partner with business to meet DBE(spell out) requirements

Initiatives for Consideration

- Expand power washing and site-clean-up services
- Utilize transitional jobs as means to provide training
- Create more business/employer contact opportunities
- Pursue more business partnerships through DBE program
- Pursue business partnerships where Goodwill® provides training for the employer
- Increase level of partnering with economic development sector and businesses
- Increase staff resources to increase business knowledge of Goodwill® through a formal plan and strategy for doing so

Conclusions:

This document addresses the general areas where Goodwill® may want to consider the investment of resources in order to meet community needs and to further expand its service delivery to persons' employment needs. This is not intended to be an all-inclusive list, nor is it intended to recommend specific programs. Rather it is intended to give the Board and staff of Goodwill® general guidelines for investment of resources in Workforce Development, Business Development expansion, Retail Development and Brand Development. Goodwill® intends to use the information to guide the planning process, recognizing that funds other than retail, such as government funds, may be necessary to support some of the needs.

The following recommendations will be used to guide Goodwill's strategic initiatives:

4. Enhance Goodwill® Workforce Development Programs – Investment of resources in additional staff and resources to improve the quality of the DDA and DORS programs creating comprehensive support programs for community employment.
    a. **Soft Skills Training** – Increase the capacity of Goodwill® to provide "soft skills" employment training to individuals from a variety of backgrounds, ethnic groups and age groups by hiring/soliciting volunteers and customizing curriculum to meet the needs of specific populations
    b. **Support Services** – Increase the availability of identified support services to all job seekers and those wishing to increase current job skills. This includes childcare, transportation, housing, counseling, substance abuse services, training for life. Services should be provided through partnerships with other organizations that are the experts in the specific area such as Vehicles For Change.
    c. **Education Programs** – Investment in educational programs that enhance job-seeking and job-advancement efforts such as GED preparation programs and English classes for speakers of other languages with additional staff or partner staff to provide these services.
5. **Offer More Job-Specific Skills Training –** Investment of resources to create job specific skills training in partnership with Ft. Detrick and the business community to address the needs of the "high growth" industries.
6. **Pursue New Business Opportunities –** Investment of resources to create start-up funding for new business ventures, expand current custodial and power washing services and business services that offer higher revenue.

In addition to the three major recommendations, this needs assessment indicated a resounding message that there needs to be an investment of resources in the branding (marketing) of Goodwill®.

Business Quick Facts	Frederick County	Carroll County	Maryland
Private non-farm establishments, 2005	5,903	4,537	138,481
Private non-farm employment, 2005	85,282	49,414	2,167,999
Private non-farm employment, percent change 2000-2005	17.9%	13.5%	5.3%
Non-employer establishments, 2005	16,158	11,364	400,007
Total number of firms, 2002	18,083	13,711	443,540
Black-owned firms, percent, 2002	2.4%	S	15.6%
American Indian and Alaska Native owned firms, percent, 2002	F	F	0.8%
Asian-owned firms, percent, 2002	3.5%	1.8%	5.9%
Native Hawaiian and Other Pacific Islander owned firms, percent, 2002	F	F	0.0%
Hispanic-owned firms, percent, 2002	2.2%	S	3.5%
Women-owned firms, percent, 2002	25.3%	28.5%	31.0%
Manufacturers shipments, 2002 ($1000)	2,672,194	835,156	36,363,340
Wholesale trade sales, 2002 ($1000)	D	490,347	60,679,602
Retail sales, 2002 ($1000)	2,346,746	1,577,424	60,039,971
Retail sales per capita, 2002	$11,223	$9,901	$11,034
Accommodation and foodservices sales, 2002 ($1000)	264,520	147,037	7,832,268
Building permits, 2006	1,300	511	23,262
Federal spending, 2004 ($1000)	1,947,083	701,617	64,725,924
Geography Quick Facts	Frederick County	Carroll County	Maryland
Land area, 2000 (square miles)	662.88	449.13	9,773.82
Persons per square mile, 2000	294.5	336.1	541.9
FIPS Code	21	13	24

People Quick Facts	Frederick County	Carroll County	Maryland
Population, 2006 estimate	222,938	170,260	5,615,727
Population, percent change, April 1, 2000 to July 1, 2006	14.2%	12.8%	6.0%
Population, 2000	195,277	150,897	5,296,486
Persons under 5 years old, percent, 2006	6.8%	5.8%	6.6%
Persons under 18 years old, percent, 2006	25.4%	24.1%	24.2%
Persons 65 years old and over, percent, 2006	9.8%	11.2%	11.6%
Female persons, percent, 2006	50.7%	50.6%	51.6%
White persons, percent, 2006 (a)	86.1%	94.2%	63.6%
Black persons, percent, 2006 (a)	8.5%	3.1%	29.5%
American Indian and Alaska Native persons, percent, 2006 (a)	0.3%	0.2%	0.3%
Asian persons, percent, 2006 (a)	3.5%	1.5%	4.9%
Native Hawaiian and Other Pacific Islander, percent, 2006 (a)	Z	Z	0.1%
Persons reporting two or more races, percent, 2006	1.6%	1.0%	1.5%
Persons of Hispanic or Latino origin, percent, 2006 (b)	5.2%	1.6%	6.0%
White persons not Hispanic, percent, 2006	81.5%	92.7%	58.4%
Living in same house in 1995 and 2000, pct 5 yrs old & over	55.3%	61.7%	55.7%
Foreign born persons, percent, 2000	4.0%	2.0%	9.8%
Language other than English spoken at home, pct age 5+, 2000	5.6%	4.2%	12.6%
High school graduates, percent of persons age 25+, 2000	87.1%	85.3%	83.8%
Bachelor's degree or higher, pct of persons age 25+, 2000	30.0%	24.8%	31.4%
Persons with a disability, age 5+, 2000	26,007	20,411	854,345
Mean travel time to work (minutes), workers age 16+, 2000	31.9	34.1	31.2
Housing units, 2006	84,960	61,065	2,300,567
Homeownership rate, 2000	75.9%	82.0%	67.7%
Housing units in multi-unit structures, percent, 2000	16.2%	12.1%	25.8%
Median value of owner-occupied housing units, 2000	$160,200	$162,500	$146,000
Households, 2000	70,060	52,503	1,980,859
Persons per household, 2000	2.72	2.81	2.61
Median household income, 2004	$69,005	$68,815	$57,019
Per capita money income, 1999	$25,404	$23,829	$25,614
Persons below poverty, percent, 2004	5.9%	5.1%	9.2%

(a) Includes persons reporting only one race.
(b) Hispanics may be of any race, so also are included in applicable race categories.

FN: Footnote on this item for this area in place of data
NA: Not available
D: Suppressed to avoid disclosure of confidential information
X: Not applicable
S: Suppressed; does not meet publication standards
Z: Value greater than zero but less than half unit of measure shown
F: Fewer than 100 firms
Source: US Census Bureau State & County Quick Facts