

Economic & Social Impact Study

–April 2026–



Report Developed by:



In Partnership With



Economic Policy Institute

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Background

During the 2025 year, Goodwill industries of Arizona contracted a research team to conduct an economic and social impact study. The focus of the study would be on the two expansive regions encompassing the state: Goodwill Industries of Southern Arizona (hereafter referred to as GISA), and Goodwill of Central and Northern Arizona (hereafter referred to as GCNA).

The research team consisted of individuals from Viable Insights, a Tucson-based applied research firm, to mainly conduct the social impact, and researchers from the Economic Policy Institute anchored at Northern Arizona University, to mainly carry out the economic impact analysis. The researchers sought to conduct a comprehensive study of not only the economic impacts of Goodwill programming in the State, but also the secondary social impacts being experienced. This report documents the findings of that study.



Executive Summary

Goodwill Industries of Southern Arizona (GISA) and Goodwill of Central & Northern Arizona (GCNA) together generate a substantial economic and social contribution across the State of Arizona. GISA and GCNA act as catalysts for opportunity—boosting economic productivity while improving the wellbeing of individuals and families. Their person-centered model, paired with significant operational scale, builds a stronger workforce pipeline and enhances community resilience statewide.

Economic Impact Snapshot

Every dollar invested in Goodwill ripples through supply chains, local businesses, and household spending – fueling broad economic growth.

- **10,447 jobs** supported across Arizona
- **\$408M+ in labor income**, increasing household earnings & purchasing power
- **\$553M in value added**, contributing directly to Arizona's Gross State Product
- **\$927M in total economic output** as spending circulates through local businesses
- **\$116M in total tax revenue**, including **\$32M+** for state and local public services

Social Impact Snapshot

Every dollar invested in Goodwill ripples through supply chains, local businesses, and household spending – fueling broad economic growth.

- Key partners of both GISA and GCNA view Goodwill as being a **trusted workforce and community partner, a responsive service provider, and a leader in collaboration and economic mobility.**
- Service and program participants in both regions reported notable social impacts around **employment readiness & job skills development, career direction and access to certifications/training, financial stability, confidence following long-job gaps or justice involvement, and improvements in mental health, family relationships, and community engagement**

Methodology

The **economic impact** analysis was conducted using the IMPLAN (Impact Analysis for Planning) model, an input-output framework widely used in economic impact studies. By accounting for regional purchasing patterns, leakages (spending outside the local economy), and inter-industry relationships, the model traces how GISA and GCNA's FY25 operational and capital spendings rippled through the economy. The results show a comprehensive picture of the economic activity and tax revenues attributable to Goodwill's presence in Arizona. The impacts are presented in the following three categories.

- **Direct Effects:** Represent the two Goodwill branches' own spending on operations, staff compensation, and immediate purchases.
- **Indirect Effects:** Capture the impact on suppliers and vendors that provide goods and services to Goodwill, such as utilities, wholesale trade, and professional services.
- **Induced Effects:** Reflect the household spending of employees whose jobs are supported directly or indirectly by Goodwill's activities, leading to further impacts on retail, housing, food services, and more.

The key indicators in this report to describe the direct, indirect, and induced effects include the following: **(1) Key Economic Indicators**, including Employment, which measures the total number of jobs supported in the economy; Labor Income, representing wages, salaries, and benefits earned by workers; Value Added, which reflects the net economic contribution to the regional economy (including labor income, business profits, and certain taxes), and Output (Economic Output), which captures the total value of goods and services produced. **(2) Fiscal Indicators**, which represent tax revenues generated at multiple levels of government, including Sub County General (such as city or municipal sales and property taxes), Sub County Special Districts (including taxes supporting services like fire, school, or utility districts), County taxes (such as local sales and property taxes), State taxes (including income, sales, and excise taxes), and Federal taxes (primarily income, payroll, and corporate taxes). **(3) Top 15 Industries by Total Economic Impact**, which identifies the sectors within the supply chain that benefit most from Goodwill's economic activities, illustrating how impacts are distributed across key industries in the regional economy.

Social impacts were assessed using a combination of surveys and focus groups. Surveys were administered to a statewide set of Goodwill partners (e.g., educational institutions, workforce development services) for the purpose of understanding perceived impact/importance of Goodwill services in the state. Aside from the partner survey, a series of focus groups were also conducted with Goodwill program participants across the State of Arizona. These sessions focused on personal impacts experienced by participants since working with Goodwill. A total of 7 of these sessions were conducted with 7-15 participants each. Specific Goodwill service/program areas were targeted for these sessions, including:

- Youth Programs

- Veteran Center
- Retail Operations
- Justice Involved
- Education Services – Adult Charter High School

Results

Due to the fact that this study focused on two unique and sprawling regions in Arizona, the findings of this study have been disaggregated to highlight results by region. As such, in both the economic impact findings and social impact findings, there are write ups for GISA and GCNA. To assist with interpretation, the following color coding scheme was utilized for the two regions.



GISA Economic Impacts

GISA's total operational spending (including payroll) of \$45 million in FY25 generated significant benefits for the regional economy. The organization's expenditures supported approximately 858 jobs across the State of Arizona.

These jobs were not only within GISA's 561 direct employment, but also extended to supplier industries (indirect employment) and local businesses where employees spent their earnings (induced employment).

Table 1. GISA's Economic Impact from Operational Spending

Impact	Employment	Labor Income	Value Added	Output
Direct	561	26,521,679	\$26,521,679	\$45,732,974
Indirect	139	8,223,133	\$13,453,734	\$25,141,057
Induced	158	10,153,922	\$19,593,377	\$31,592,309
Total	858	44,898,734	\$59,568,789	\$102,466,340

The Direct Impact includes 561 jobs, tied to GISA’s own operations, supported by \$26 million in labor income. These activities produced \$27 million in value added and nearly \$48 million in total economic output. The Indirect Impact includes 139 jobs in supplier industries, generating \$8 million in labor income, \$13 million in value added, and \$25 million in output. The Induced Impact includes 158 jobs supported through household spending, with \$10 million in labor income, \$20 million in value added, and \$32 million in output. In total, GISA’s FY25 operations produced **858 jobs**, nearly **\$45 million** in Labor Income, **\$60 million** in Value Added. The **Total Output is \$102 million**.

Beyond supporting jobs and output, GISA’s activities also generated tax revenues (Table 2) at multiple levels of government. Although as a 501(c)(3) non-profit organization, Goodwill is exempt from federal income tax on income related to its mission, it does pay some taxes, such as payroll taxes and some specific business income taxes. The indirect and induced taxes are more substantial.

- Local Taxes: \$468,566 for sub-county general funds, \$544,367 for sub-county special districts, and \$215,985 for the county, totaling more than \$1 million locally.
- State Taxes: \$292,333 in direct state revenues, with additional contributions through supplier and household activities, bringing the state total to nearly \$2 million.
- Federal Taxes: \$5.8 million directly. Over \$10 million overall across direct, indirect, and induced effects.

Altogether, GISA’s FY25 operations generated **\$13 million in tax revenues across federal, state, and local governments**. These funds support essential services such as education, healthcare, and infrastructure.

Table 2. GISA’s Tax Impacts from Operational Spending

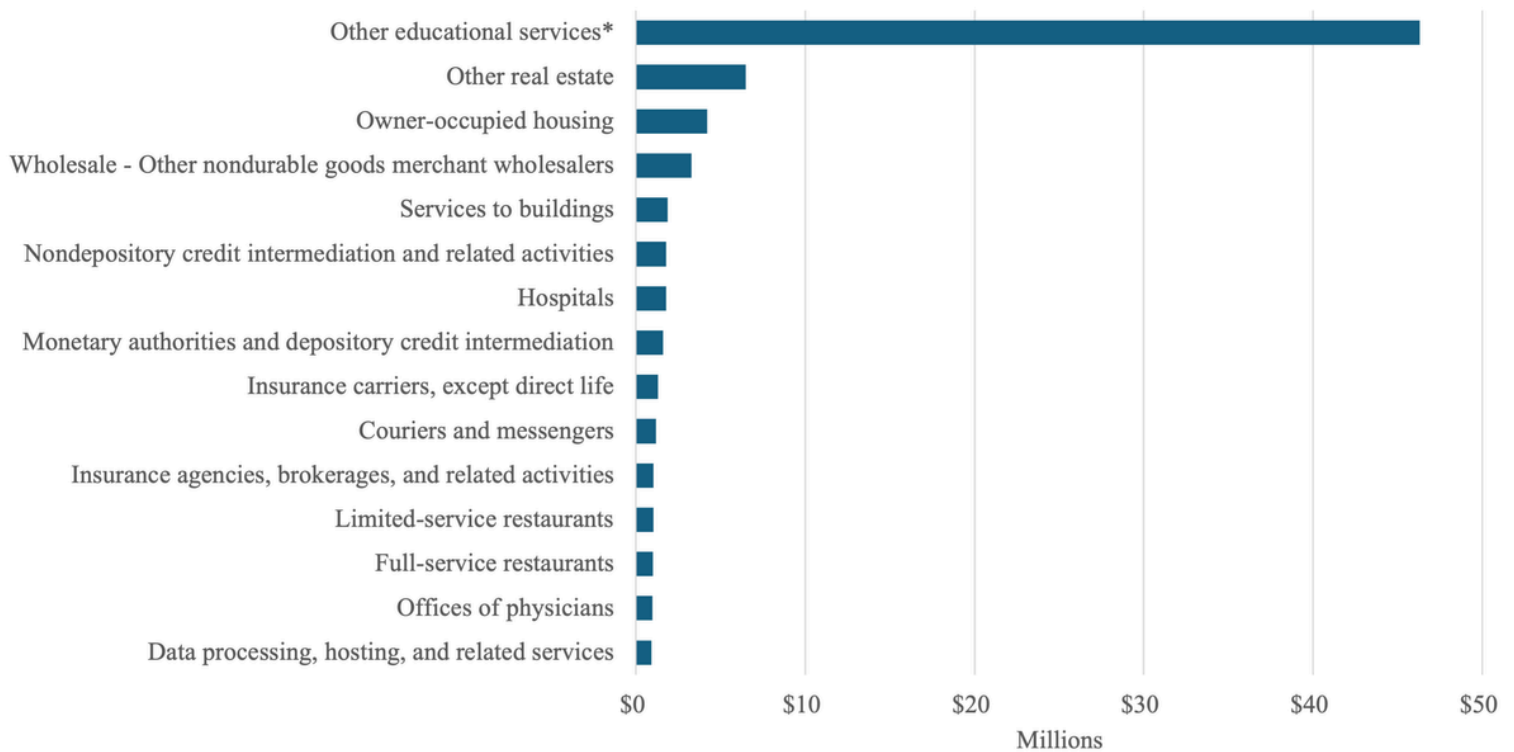
Impact	Sub County General	Sub County Special Districts	County	State	Federal	Total
Direct	\$2,288	\$13,720	\$4,613	\$292,333	\$5,762,957	\$6,075,911
Indirect	\$162,581	\$185,754	\$73,933	\$609,976	\$1,888,619	\$2,920,864
Induced	\$303,697	\$344,893	\$137,439	\$1,079,588	\$2,513,687	\$4,379,303
Total	\$468,566	\$544,367	\$215,985	\$1,981,897	\$10,165,263	\$13,376,078

The industries benefited by GISA’s operational spending (Figure 1) reflect both its mission-driven services and the everyday business activities required to support them. Other educational services experience the largest impact because workforce training, job readiness, and program delivery are central to Goodwill’s operations. Real estate–related industries, including owner-occupied housing, are influenced as employees spend their earnings locally, supporting housing markets. Wholesale trade and building services benefit from Goodwill’s ongoing need for supplies, facility maintenance, and operational inputs.

In addition, health care providers see increased activity as household income supports spending on medical services, while transportation, data processing, and food services are strengthened by logistics needs, administrative operations, and everyday consumer spending linked to Goodwill’s workforce.

Figure 1. Top 15 Industries by Total Economic Impact from GISA’s Operational Spending

Top 15 Industries by Total Economic Impact from GISA’s Operational Spending



** We categorize Goodwill as the other educational services industry, given its career training activities, which is the main focus of this study.*

Economic Impact by Capital Expenditures

GISA made nearly \$2 million worth of capital purchases in FY2025 (Table 3). In IMPLAN, capital is defined as durable assets and devices that can be thought of as an investment for the purchaser. Capital assets usually last more than one year. For Industries, this includes purchases that are used but not consumed in production, and are treated as a type of final demand in an economic impact model.

In FY2025, GISA's capital expenditure supported 14 jobs, represented \$996 thousand of labor income, generated \$2.6 million total economic output, in which, \$1.6 million was the value added (GDP), as shown in Table 4.

Table 3. GISA's Economic Impact from Capital Spending

Impact	Employment	Labor Income	Value Added	Output
Direct	8.3	619,691	869,462	1,415,894
Indirect	1.9	146,633	258,341	461,845
Induced	3.5	229,419	461,793	742,185
Sub total	13.6	995,743	1,589,596	2,619,924

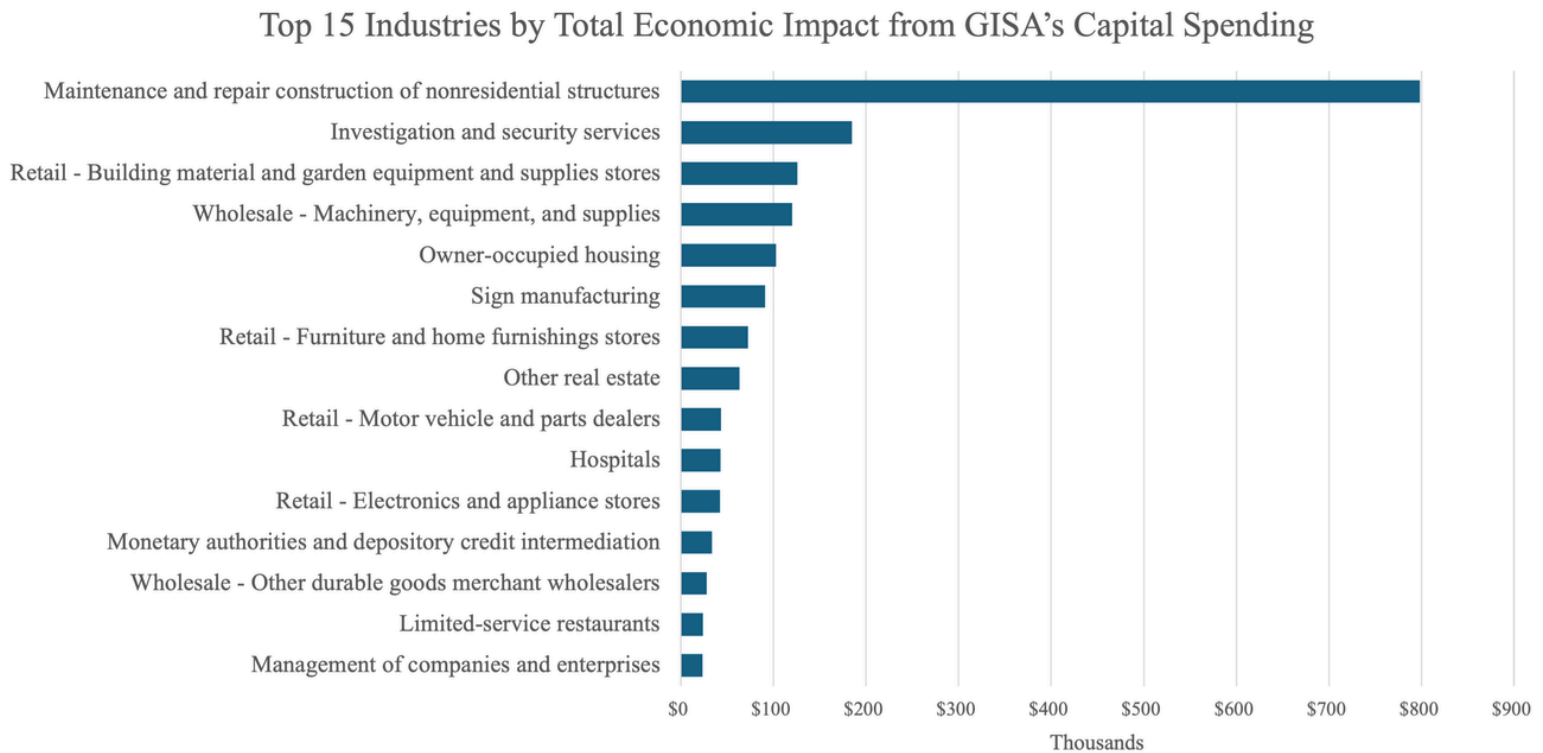
GISA's capital expenditures generated a total of \$361,987 in tax revenues across all levels of government. Direct effects accounted for \$202,620 in tax revenues, reflecting taxes generated by the initial spending paid directly to vendors, while the \$59,330 of indirect and \$100,037 of induced effects highlight additional tax revenues generated through supply-chain activity and household spending supported by the capital investment. Refer to table 4 for a breakdown of these findings.

Table 4. GISA's Tax Impacts from Capital Spending

Impact	Sub County General	Sub County Special Districts	County	State	Federal	Total
Direct	\$11,038	\$12,251	\$4,314	\$38,219	\$136,799	\$202,620
Indirect	\$4,157	\$4,575	\$1,614	\$13,703	\$35,281	\$59,330
Induced	\$7,237	\$7,949	\$2,805	\$23,866	\$58,179	\$100,037
Total	\$22,432	\$24,775	\$8,734	\$75,788	\$230,259	\$361,987

The industries most impacted by GISA's capital spending reflect the construction- and investment-driven nature of these expenditures (Figure 2). Nonresidential maintenance and repair construction sees the greatest effect as funds are directed toward facility improvements, renovations, and upkeep. Building materials, machinery, and durable goods wholesalers and retailers benefit from the purchase of construction inputs, equipment, and furnishings needed to outfit and maintain Goodwill facilities. Specialized services, such as investigation and security services and sign manufacturing, are supported through project-related needs tied to facility operations and visibility. Capital spending also supports real estate and owner-occupied housing through wages paid to workers who then spend locally, while financial services, health care, restaurants, and vehicle-related retail experience indirect and induced impacts as construction and supplier employees circulate income throughout the local economy.

Figure 2. Top 15 Industries by Total Economic Impact from GISA's Capital Spending



GISA Broader Economic Impact

In FY2025, GISA demonstrated significant impact in workforce development, education, and environmental sustainability across its programs. Through partnerships such as Arizona@Work, Adult Career Centers, reentry initiatives, and youth-focused programs, Goodwill achieved a total of 1,293 job placements with an average wage of \$17.38. These outcomes included 247 placements through AZ@Work contracts (9 in Adult Case Manager 1, 62 in Adult Case Manager 2, 171 in H1-B programs, and 5 in On-the-Job Training), 878 placements through Adult Career Centers, 47 through reentry programs, 120 through Youth Reengagement Programs, and 1 through the Youth Restoration Program. Because the vast majority of participants entered programming without employment (with only about 5 individuals already employed), these placements represent approximately 1,288 newly employed individuals. Based on the average wage, this translates to an estimated \$46.6 million in new annual household income generated for the community. Beyond direct earnings, this increased household income also drives broader economic activity. As those \$46.6 million in new annual earnings for participants and households circulated through the regional economy, they supported an additional 310 jobs and generated \$20.6 million in labor income, \$41.8 million in value added, and \$67.4 million in economic output.

In total, GISA's FY2025 job placement programs supported approximately **1,598 jobs** (direct and induced combined) and generated an estimated **\$67.2 million in labor income, \$41.8 million in value added, and \$67.4 million in total economic output.**

In addition to employment outcomes, Goodwill supported educational advancement, with 28 participants earning their GED and 30 completing their high school diploma. The organization also advanced its sustainability mission by diverting 37 million pounds of materials from landfills, reinforcing its dual focus on environmental stewardship and community impact.

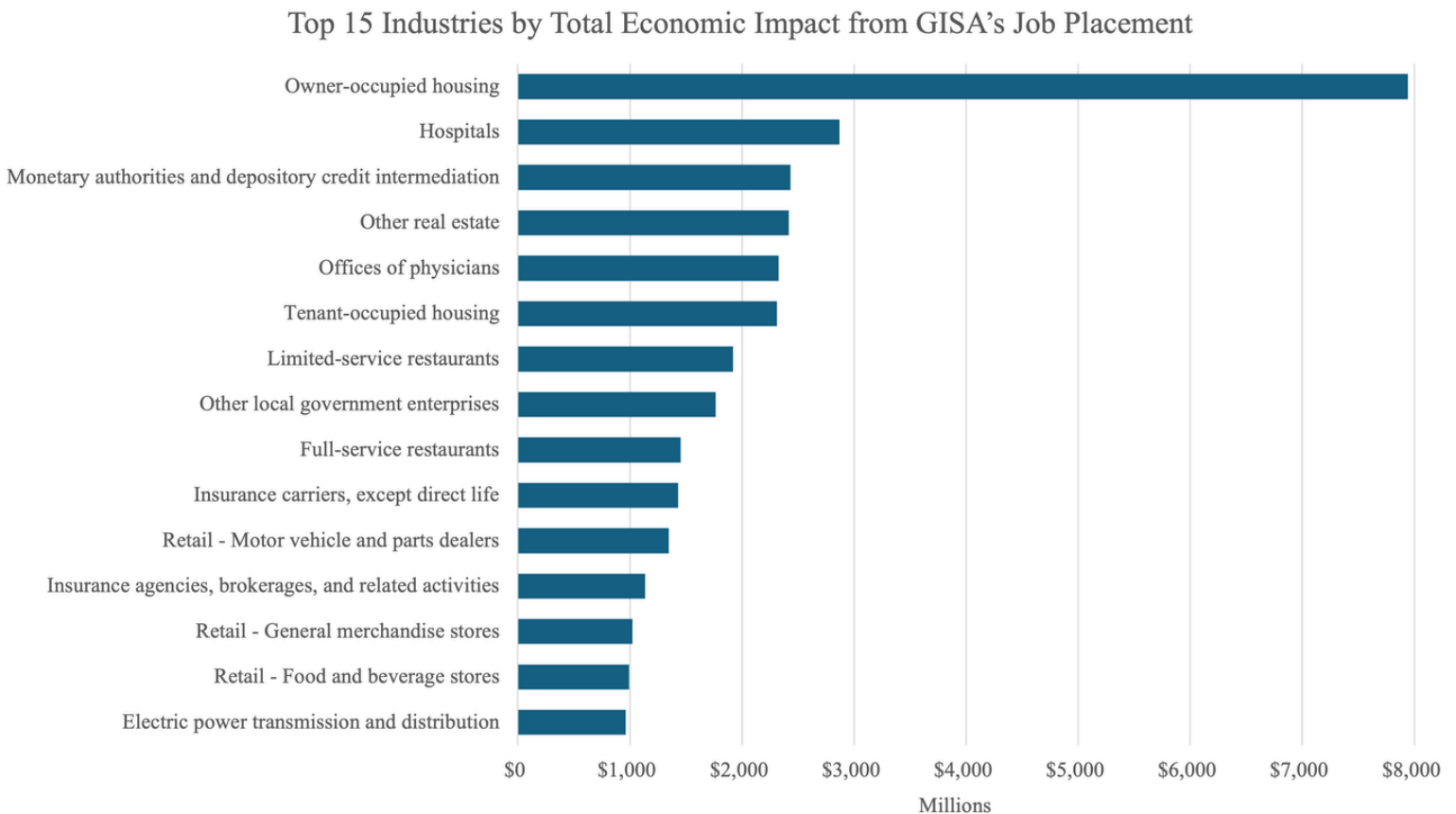
GISA's job placement efforts also generate meaningful public revenue through increased economic activity (Table 5). As participants' earnings circulate through the economy, the induced effects are estimated to generate approximately \$9.0 million in total tax revenue. This includes about \$642,740 to sub-county general jurisdictions, \$706,099 to special districts, \$249,183 to counties, and \$2.1 million in state tax revenue, along with \$5.2 million in federal taxes. These contributions highlight the broader fiscal benefits of Goodwill's workforce programs, supporting essential public services and strengthening government resources at multiple levels.

Table 5. GISA's Tax Impacts from Job Placement

Impact	Sub County General	Sub County Special Districts	County	State	Federal	Total
Induced	\$642,740	\$706,099	\$249,183	\$2,126,304	\$5,239,739	\$8,964,066

GISA's job placement outcomes generate widespread economic benefits across a range of industries (Figure 3), with the largest impacts seen in housing, healthcare, finance, and retail sectors. Owner-occupied housing experienced the greatest benefit, with nearly \$7.9 million in economic activity, followed by hospitals (\$2.9 million) and financial institutions such as banks and credit intermediation (\$2.4 million). Real estate and healthcare services, including offices of physicians and tenant-occupied housing, also saw substantial gains, each exceeding \$2.3 million. Additionally, everyday consumer-driven sectors such as restaurants, retail stores, and utilities benefited significantly, reflecting how increased household earnings translate into broad-based local economic activity.

Figure 3. Top 15 Industries by Total Economic Impact from GISA's Job Placement



GISA Total Economic Impact

In FY2025, the combined economic impact of GISA's operations and capital expenditures generated substantial benefits for the state of Arizona. Together, these activities supported 871 jobs, providing critical employment opportunities that strengthened household stability and fueled local spending. The organization contributed more than **\$45 million in labor income**, highlighting its role as a major employer and economic driver. Overall, GISA added **\$61 million in value to the regional economy** and generated over **\$105 million in total output**, amplifying economic activity across interconnected industries. This combined impact also delivered important public revenue, producing **\$13.7 million in total tax contributions**, in which **\$3.3 million is state and local taxes**, which help sustain essential community programs, infrastructure, and public services.

In addition to GISA's direct spending, its job placement efforts serve as a critical driver of economic mobility by generating approximately \$46.6 million in new direct household earnings for participants. As these earnings are spent in the local economy, they further support an additional \$20.6 million in induced labor income, creating a ripple effect that sustains local jobs and businesses. Together, these impacts extend beyond individual participants, strengthening the broader regional economy through increased income and economic activity.

When combining impacts from Goodwill's organizational spending and job placement activities, the organization supported an estimated 2,470 jobs across the regional economy. These activities generated a combined \$67.2 million in labor income, \$61.2 million in value added, and \$105.1 million in total economic output. In addition, Goodwill Tucson's presence and programming contributed significantly to public revenues, generating approximately \$22.7 million in total tax revenue, including \$7 million in state and local taxes (Table 6). These results demonstrate the organization's dual role as both a major employer and service provider, as well as a powerful economic engine that drives job creation, income growth, and fiscal benefits for the broader community.

Table 6. Total Economic Impact from GISA's FY2025 Spending

	Employment	Labor Income	Value Added	Output	Total Tax	State & Local Tax
From GISA spending	871.6	\$45,894,477	\$61,158,385	\$105,086,264	\$13,738,065	\$3,342,544
From GISA job placement	1,598	\$67,188,380	\$41,757,923	\$67,368,441	\$8,964,066	\$3,724,327
Sub total	2469.6	\$67,188,380	\$61,158,385	\$105,086,264	\$22,702,131	\$7,066,871

GCNA Economic Impacts

GCNA's operational spending (Table 8) in FY25 generated significant benefits for the regional economy. The organization's expenditures supported approximately 7,000 jobs across the State of Arizona, including its own 5,344 employees.

These jobs were not only within GCNA (direct employment) but also extended to supplier industries (indirect employment) and local businesses where employees spent their earnings (induced employment).

The Direct Impact (Table 7) includes 5,344 jobs, supported by \$183 million in labor income (this also includes stipends that are not included in payroll). These activities produced \$224 million in value added and \$360 million in total economic output. The Indirect Impact includes 752 jobs in supplier industries, generating \$50 million in labor income, \$97 million in value added, and \$187 million in output. The Induced Impact includes 1,064 jobs supported through household spending, with \$70 million in labor income, \$141 million in value added, and \$227 million in output.

In total, GCNA's FY25 operations supported **7,160 jobs**, **\$304 million** in Labor Income, **\$463 million** in Value Added. The Total Output is over **\$775 million**.

Table 7. GCNA's Economic Impact from Operational Spending

Impact	Employment	Labor Income	Value Added	Output
Direct	5,344	183,430,242	224,685,657	360,942,485
Indirect	752	50,808,923	97,426,811	187,414,102
Induced	1,064	70,305,694	141,520,663	227,449,611
Sub total	7,160	304,544,859	463,633,132	775,806,198

Beyond supporting jobs and output, GCNA's activities also generated substantial tax revenues (Table 8) at multiple levels of government.

- Local Taxes: \$3.4 million for sub-county general funds, \$3.8 million for sub-county special districts, and \$1.3 million for the county, totaling over \$8 million locally.
- State Taxes: \$2.3 million in direct state revenues, with additional contributions through supplier and household activities, bringing the state total to over \$13 million.
- Federal Taxes: \$39 million directly, and over \$69 million overall across direct, indirect, and induced effects.

Altogether, GCNA's FY25 operations generated nearly **\$92 million in tax revenues** across federal, state, and local governments. These funds support essential services such as education, healthcare, and infrastructure.

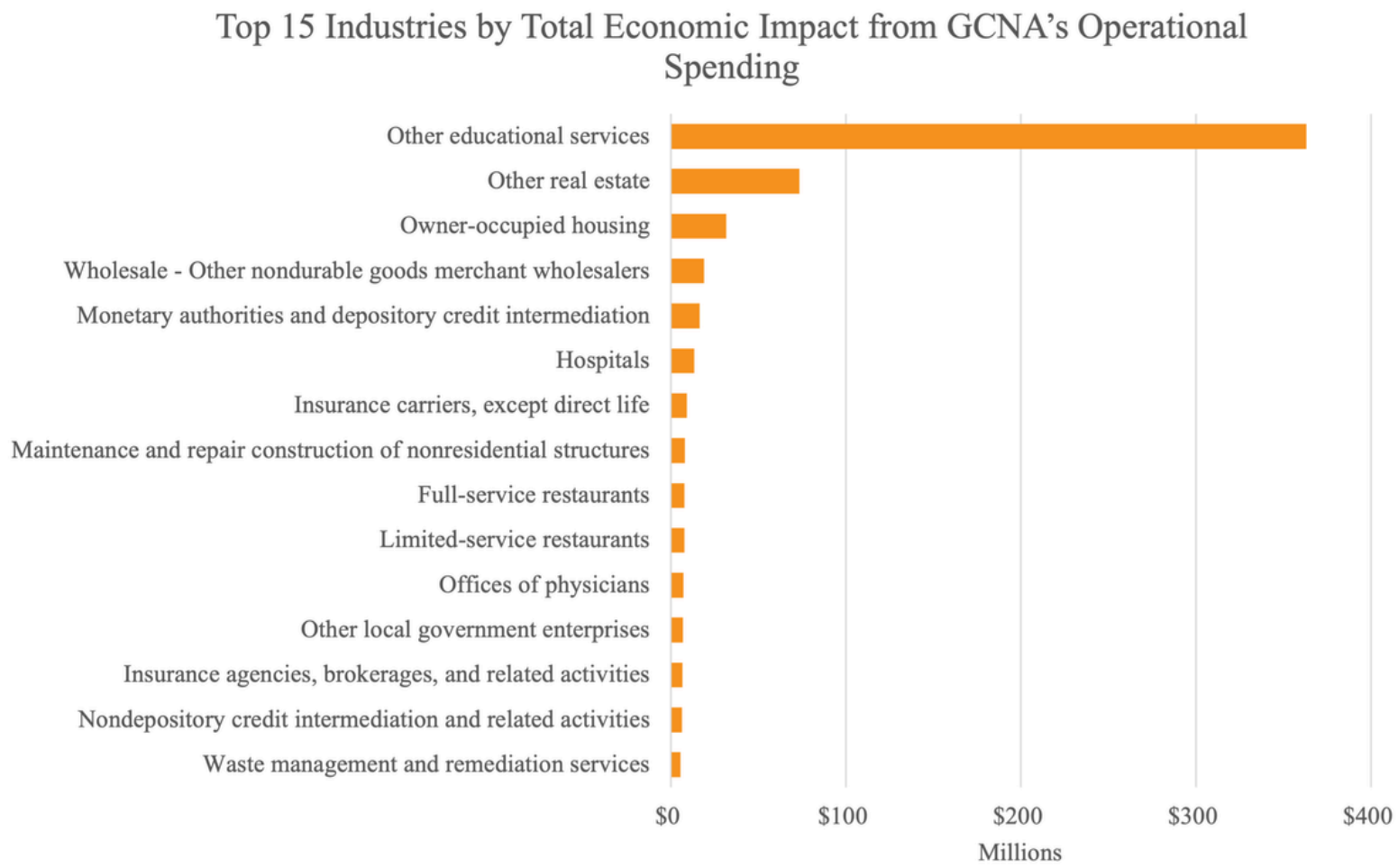
Table 8. GCNA's Tax Impacts from Operational Spending

Impact	Sub County General	Sub County Special Districts	County	State	Federal	Total
Direct	\$80,297	\$166,446	\$52,696	\$2,314,566	\$39,234,538	\$41,848,543
Indirect	\$1,174,471	\$1,295,706	\$456,793	\$4,089,235	\$12,271,895	\$19,288,100
Induced	\$2,217,748	\$2,436,063	\$859,721	\$7,313,706	\$17,829,309	\$30,656,547
	\$3,472,515	\$3,898,215	\$1,369,210	\$13,717,507	\$69,335,742	\$91,793,189

The industries most affected by GCNA's operational spending (Figure 4) reflect the organization's strong workforce development mission and its broad integration into the regional economy. Other educational services experience the largest impact because Goodwill's core activities center on job training, education, and employment support programs. Real estate and housing related industries, including owner- and tenant-occupied housing, benefit as employees and households supported by Goodwill spend their earnings locally. Health care services, such as hospitals and physicians' offices, see increased activity through induced household spending and employee benefits. Financial and

insurance industries are impacted through payroll processing, lending, and risk management associated with ongoing operations. In addition, wholesale trade, construction and maintenance services, food services, and local government enterprises benefit from Goodwill’s day-to-day purchasing needs and the ripple effects of employee and supplier spending throughout Northern Arizona’s economy.

Figure 4. Top 15 Industries by Total Economic Impact from GCNA’s Operational Spending



GCNA made nearly \$10.8 million worth of capital purchases in FY2025. That capital expenditure supported 67 jobs. Those jobs are those hired by the vendors (direct), the upstreaming industries (indirect), and the supporting industries that serve those employees in those vendor or supplier industries. The capital expenditure generated \$5.6 million of labor income, \$16 million total economic output within Arizona, in which, \$9 million was the value added (GDP) (Table 9).

Table 9. GCNA's Economic Impact from Capital Spending

Impact	Employment	Labor Income	Value Added	Output
Direct	33.9	\$3,233,155	\$4,614,458	\$8,437,385
Indirect	13.8	\$1,063,965	\$1,818,532	\$3,231,266
Induced	19.5	\$1,288,756	\$2,594,042	\$4,169,089
Sub total	67.1	\$5,585,877	\$9,027,032	\$15,837,740

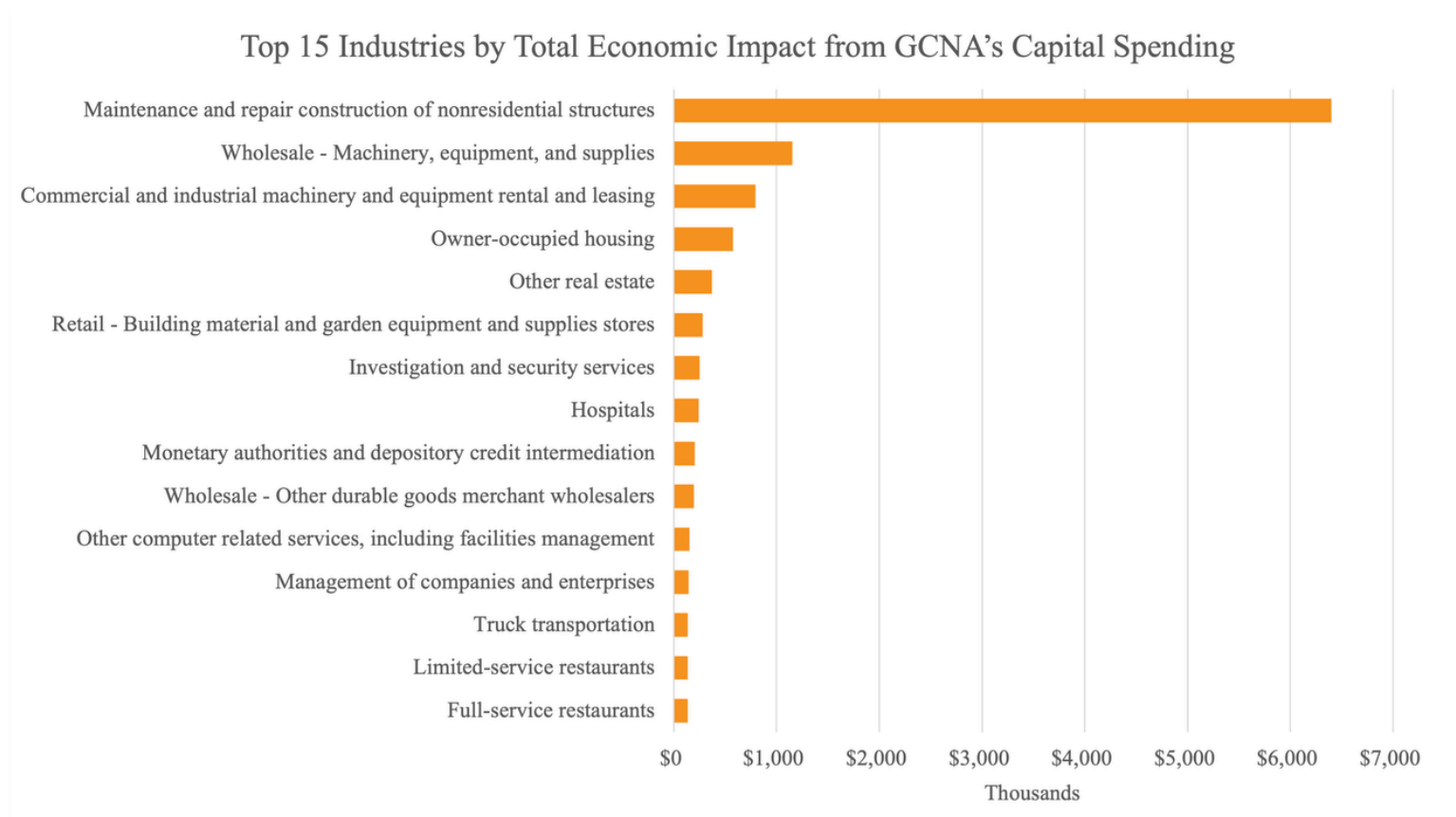
GCNA's capital spending generates an estimated **\$1.9 million in total tax revenues** through direct, indirect, and induced economic activity (Table 10). Of this total, approximately \$268,000 supports local governments, including sub-county general governments, special districts, and counties, reflecting the local fiscal benefits of capital investment related spending. GCNA's capital investments not only improve facilities and infrastructure, but also generate meaningful public revenues that help support local and regional government services.

Table 10. GCNA's Tax Impacts from Capital Spending

Impact	Sub County General	Sub County Special Districts	County	State	Federal	Total
Direct	\$35,476	\$39,883	\$14,005	\$139,400	\$702,792	\$931,555
Indirect	\$31,185	\$34,305	\$12,104	\$101,756	\$252,960	\$432,310
Induced	\$40,654	\$44,656	\$15,760	\$134,067	\$326,818	\$561,954
Sub total	\$107,315	\$118,843	\$41,869	\$375,223	\$1,282,570	\$1,925,819

The industries most impacted by GCNA's capital spending reflect the investment-driven nature of these activities (Figure 5). Nonresidential structures maintenance and repair construction experiences the largest effect, with more than \$6.4 million in total economic impact tied to facility upgrades and renovations. Machinery, equipment, and durable goods wholesalers also see substantial impacts, as capital projects require specialized equipment and supplies. Additional impacts flow to real estate and owner-occupied housing for nearly \$230,000 through worker income and local spending, while security services, building materials retail, and equipment rental each receive notable benefits. Beyond construction-related industries, health care providers, financial services, transportation, and food services are supported through indirect and induced effects as spending circulates through the economy.

Figure 5. Top 15 Industries by Total Economic Impact from GCNA's Capital Spending



GCNA Broader Economic Impacts from Job Placement

In FY2025, GCNA demonstrated strong outcomes in workforce development and education through its Mission Services programs. The organization achieved 644 job placements, supporting 609 individuals in securing employment at an average wage of \$16.13. These placements generated an estimated \$20.4 million in new annual household income, reflecting a substantial economic impact for the communities served. In addition, the Excel Center program contributed 18 job placements at a higher average wage of \$19.67, generating an estimated \$736 thousand in new annual household income further advancing opportunities for students to transition into quality employment. These two programs together, generated approximately \$21.2 millions of direct new annual household income, which in turn supported an additional 141 jobs and generated \$9.4 million in labor income, \$19 million in value added, and \$30.6 million in total economic output through induced economic activity. This demonstrates GCNA's impact in driving economic mobility and helping individuals achieve sustainable career pathways.

In total, GCNA's FY2025 job placement efforts supported approximately **750 jobs** (direct and induced combined) and generated an estimated **\$30.5 million in labor income, \$19 million in value added, and \$30.6 million in total economic output.**

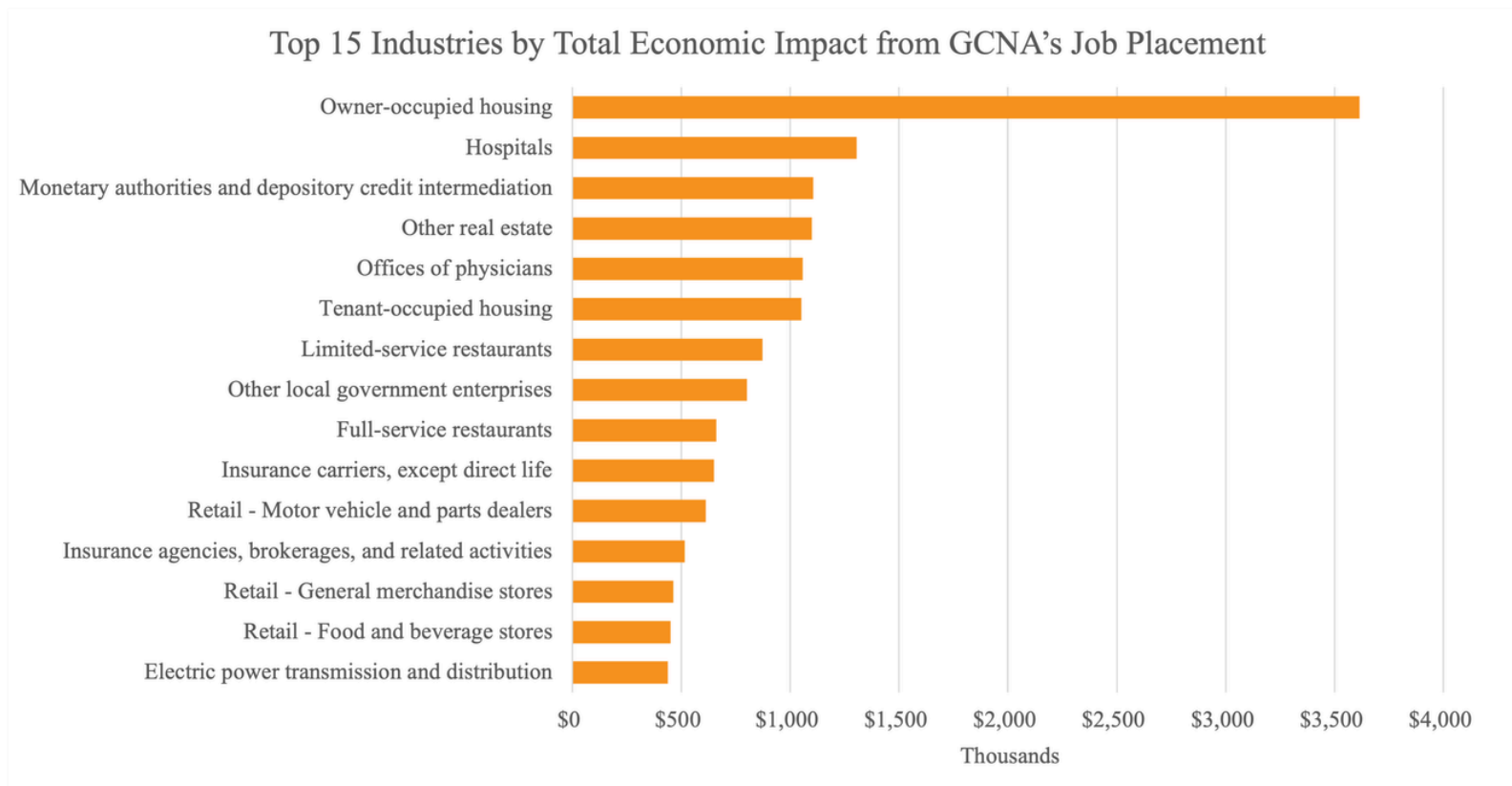
GCNA's job placement efforts also generate meaningful fiscal benefits as increased household earnings circulate through the economy (Table 11). Since the household earnings go to purchasing final goods, there are no indirect effects, but induced effects. The induced economic activity from these placements is estimated to generate approximately \$4.1 million in total tax revenue, including \$292,405 to sub-county general jurisdictions, \$321,230 to special districts, and \$113,362 to counties. At the state and federal levels, this activity contributes about \$967,332 in state tax revenue and \$2.4 million in federal taxes.

Table 11: GCNA's Tax Impacts from Job Placement

Impact	Sub County General	Sub County Special Districts	County	State	Federal	Total
Induced	\$292,405	\$321,230	\$113,362	\$967,332	\$2,383,744	\$4,078,073

GCNA's job placement outcomes create ripple effects across a diverse set of industries, with the most pronounced impacts in housing, healthcare, finance, and local services (Figure 6). The largest benefit is seen in owner-occupied housing at approximately \$3.6 million, followed by hospitals (\$1.3 million) and financial sectors such as banking and credit intermediation (about \$1.1 million). Real estate-related activities and healthcare providers, including offices of physicians and tenant-occupied housing, each exceed \$1.0 million, highlighting increased demand for essential services. At the same time, consumer-facing industries, such as restaurants, retail, insurance, and utilities, also experience steady gains, illustrating how increased earnings from job placements support everyday spending throughout the local economy.

Figure 6: Top 15 Industries by Total Economic Impact from GCNA's Job Placement



GCNA Total Economic Impact

In FY2025, the combined economic impact of GCNA's operations and capital expenditures (Table 12) generated substantial benefits for the state of Arizona. Together, these activities supported 7,977 jobs, providing critical employment opportunities that strengthened household stability and fueled local spending. The organization contributed more than \$340 million in labor income, highlighting its role as a major employer and economic driver. Overall, GCNA added more than \$491 million in value (GDP) to the regional economy and generated \$822 million in total output, amplifying economic activity across interconnected industries. This combined impact also delivered important public revenue, producing \$94 million in total tax contributions, in which \$25 million is state and local taxes, which help sustain essential community programs, infrastructure, and public services.

Table 12. Total Economic Impact from GCNA's FY2025 Spending

	Employment	Labor Income	Value Added	Output	Total Tax	State & Local Tax
From GCNA spending	7,227	\$310,130,736	\$472,660,164	\$791,643,938	\$93,719,008	\$23,100,697
From GCNA job placement	750	\$30,583,805	\$18,997,167	\$30,648,304	\$4,078,073	\$1,694,329
Sub total	7,977	\$340,714,541	\$491,657,331	\$822,292,242	\$93,719,008	\$24,795,026

GISA Social Impacts

Partner Survey. Survey responses (n=24) from community partners in the GISA region illustrated a highly positive and engaged understanding of Goodwill's contributions. Respondents represented organizations focused primarily on youth development, leadership training, education, and social services, many of which operate in close alignment with Goodwill's mission. Respondents overwhelmingly described their relationship with Goodwill as strong, intentional, and well-established. **Many characterized their partnership as foundational to serving youth and adults seeking stability, skills, and employment.**

Partners indicated that Goodwill plays a critical role in workforce development. They highlighted Goodwill's ability to provide accessible career pathways, training programs, and holistic support services that help individuals overcome barriers and transition successfully into employment. Respondents also emphasized the positive influence of Goodwill's staff, describing them as supportive, inspiring, and deeply committed to community wellbeing. Partners underscored a desire for ongoing collaboration, noting that Goodwill's multifaceted initiatives – education, workforce development, youth services, and community centers – collectively create significant social and economic value.

Overall, the GISA partner feedback portrayed Goodwill as a central, trusted, and transformative force in the region's workforce and community development ecosystem.

Participant Focus Groups. Across all three focus groups in this region, participants described Goodwill as **a powerful catalyst for employment access, financial stability, emotional well-being, and community engagement.** Regardless of the program pathway, individuals consistently credited Goodwill with providing the structure, skills, confidence, and support required to make meaningful progress toward personal and economic goals. While the shared themes across groups were strikingly consistent, several unique experiences emerged among youth and justice-involved participants that further illustrate the breadth and depth of Goodwill's regional impact.

Participants across all programs highlighted GISA's role in helping them secure employment, gain practical skills, and build confidence as job seekers. Many described entering GISA with limited experience, significant barriers to employment, or long gaps in their work histories. Through a combination of job readiness training, certifications, resume writing support, interview coaching, and one-on-one guidance, participants reported concrete improvements in their employability.

"I think the Goodwill centers are the only places I've gone when needing help where I'm not only acknowledged but they actually help me. Other places make you hop in a line, only offer services for a small window, and really make you feel like a burden. Goodwill really sees you and I don't experience that anywhere else."

Although all participants benefited from these supports, justice-involved participants noted especially transformative effects, describing their experience as the first time they had been given a real chance to work, rebuild their identity, and overcome stigma in the labor market. Conversely, youth participants commonly identified Goodwill as the entry point into their very first jobs, emphasizing the value of foundational skills and early career exposure.

Participants widely reported improved financial stability resulting from Goodwill's programs. Consistent income from work experience placements, new jobs, or improved employability allowed participants to:

- **Meet basic needs**
- **Save money**
- **Pay bills on time**
- **Reduce stress related to housing and transportation**
- **Regain control over personal finances**

Youth often described Goodwill as their first source of reliable income, helping them transition out of homelessness or severe financial instability. Adults in the Career Center described Goodwill as a "lifeline" during periods of job loss, disability, or economic hardship. Justice-involved participants often experienced the greatest economic shift, reporting that stable employment through Goodwill enabled them to secure housing, purchase vehicles, and build long-term financial footing for the first time in years.

Across all focus groups, participants emphasized **improvements in mental health, confidence, motivation, and overall well-being**. Goodwill was consistently described not only as a workforce program but as a supportive, affirming environment where staff are approachable, encouraging, and deeply invested in participant success. Participants frequently credited staff with helping them reduce anxiety, rebuild self-worth, stay motivated during difficult periods, and cope with depression, grief, or uncertainty in their lives.

While these emotional benefits were widely shared, youth participants were more likely to describe Goodwill as their primary or only emotional support system, particularly when access to formal mental health services was limited. In contrast, justice-involved participants described Goodwill as a space where they felt respected and valued, often for the first time since incarceration, contributing significantly to their sense of dignity and renewed purpose.

Participants reported notable improvements in their family lives as a result of greater emotional stability and financial security. Many described becoming better caregivers, improving communication with family, or serving as role models for their children. Further, across groups, increased stability led to less stress at home, parents felt more confident providing for their children, and participants reported stronger family engagement and pride. Justice-involved participants uniquely described rebuilding long-damaged family

relationships, including regaining trust from parents or reconnecting with their children. For these individuals, GISA's programs supported not just economic reintegration but relational healing.

Participants across all programs described becoming **more involved in their communities**, often attributing this change to increased confidence, stability, and a desire to "give back" after their own progress. Participants talked about how they liked to volunteer at job fairs, network and share job opportunities, refer peers or family members to Goodwill, and ultimately use their learned skills to help others. While all groups reported community engagement, justice-involved participants described the most formal and structured involvement, often taking on leadership or mentoring roles that extended Goodwill's impact into broader community contexts.

Participants universally expressed strong appreciation for Goodwill, describing the organization as supportive, welcoming, accessible, respectful, and responsive to individual needs. Many contrasted Goodwill favorably with other agencies, noting that **Goodwill staff "treat you like a person,"** consistently follow up, and create a safe space where participants feel comfortable seeking help. This was not the reported experience with other (non-Goodwill) services and organizations in the community, where participants indicated they often feel like they are treated like a burden by staff.

When asked how GISA could improve their impact in the community, participants asked for a continued expansion of employment opportunities, increased outreach to make services more visible, and ongoing availability of certifications and hands-on training.

Taken together, the findings demonstrate that GISA's programs produce substantial economic and social impact. Participants across diverse backgrounds experience measurable gains in employment readiness, financial stability, emotional health, and social connection. At the same time, unique subpopulations – such as youth and justice-involved individuals – experience deeper, population-specific benefits that reflect Goodwill's capacity to meet distinct participant needs.

Overall, GISA's person-centered approach, supportive staff culture, and practical workforce services contribute to:

- **Individual upward mobility**
- **Stronger family systems**
- **More engaged communities**
- **Greater regional economic participation**
- **Reduction of systemic barriers for high-need populations**

"Before my family would not trust me, and Goodwill helped me get back in with my family and rebuild trust after 20 years of estrangement. My mom is now proud of me. They helped me become something. Used to be a nobody and now I'm pushing and growing."

GCNA Social Impacts

Partner Survey. Survey responses (n=12) revealed that community partners largely view GCNA as a **key contributor to regional workforce and community development**. Similar to GISA respondents, organizations represented in the survey primarily provide education, training, and social services, many of which overlap with Goodwill's mission. As a result, respondents characterized their relationship with Goodwill along a spectrum ranging from no direct connection to well-established, multi-year partnerships.

Across responses, GCNA was consistently seen as a **provider of workforce entry pathways, offering career preparation, training opportunities, and accessible community support services**. Many stakeholders highlighted Goodwill's role in preparing job seekers for employment through workshops, skill-building, and supportive services that help individuals overcome barriers. Partners generally agreed that GCNA plays an important role in regional workforce development.

Overall, feedback suggested that GCNA is viewed as a critical workforce partner with the potential for even greater impact through expanded outreach and stronger cross-organizational partnerships.

Participant Focus Groups. Across the GCNA region, participants described Goodwill as an **essential source of economic opportunity, workforce development, educational progress, and social support**. Despite representing different program areas (i.e., career seekers, employees in Goodwill's retail operations, and adult students) participants reported consistent and powerful impacts on their employment trajectories, financial stability, personal well-being, family relationships, and community involvement.

Participants across all program areas described GCNA as **significantly improving their employment situations**.

Individuals seeking jobs, working within Goodwill retail operations, or attending adult high school programs all reported acquiring new skills, accessing career opportunities, and gaining confidence in their professional abilities. Participants reported gaining an increase in computer literacy and workplace technology skills, increased confidence engaging with people, and very much appreciated Goodwill providing access to training/certifications and support with job placement.

"I worked at a company in Oregon for about 20 years but went through some bad times. I got in with Goodwill after that, started at the bottom and worked my way back up real fast. This place has been a blessing for me."

Many participants emphasized GCNA's hands-on support, personalized guidance, and the availability of staff to help them navigate technical tasks or complex job applications. Individuals in the retail and education programs noted substantial growth in soft skills, including communication, conflict resolution, leadership, and self-advocacy. These skills translated into promotions, renewed career direction, or career changes.

A meaningful distinction emerged among adult education participants, who often described GCNA as the **pathway to entirely new career fields** through adult high school programming, childcare support, and structured academic coaching. Several of these participants reported discovering new professional passions, particularly in education, healthcare, and skilled trades as a direct result of their time at Goodwill.

Across programs, participants reported improvements in their financial stability, though the nature of these changes varied by circumstance. Some described direct earnings increases through job placement or promotions, while others credited Goodwill with teaching financial literacy skills, supporting budgeting habits, or enabling long-term financial planning.

Key financial impacts included:

- **Greater ability to meet expenses and manage household budgets**
- **Paying off debts or saving money for the first time**
- **Purchasing vehicles, securing stable housing, or supporting family members**
- **Experiencing relief from financial stress through consistent employment**
- **Reducing transportation costs through access to centrally located services**

Several adult education learners described deliberately taking a temporary pay cut to return to school, acknowledging the financial sacrifice while expressing confidence that their long-term earning potential would substantially improve due to Goodwill's academic and career supports. For these individuals, Goodwill played a critical role in helping them transition from short-term income to long-term economic mobility.

Retail participants often attributed improved financial stability to wage increases tied to internal promotions or expanded responsibilities. Meanwhile, job seekers in the career center reported that access to technology, coaching, and job search assistance played a vital role in achieving employment more quickly, reducing the duration of unemployment and its associated financial strain.

"When I got here I didn't have much. I have a car now, an apartment, some money in the bank, and am taking some classes."

"Goodwill doesn't just give products a second chance...it does the same for people"

Participants across the GCNA region consistently described Goodwill as a supportive, welcoming, and stabilizing environment that contributed meaningfully to their emotional well-being. Many viewed Goodwill as a place where they could escape stress, receive understanding, and connect with others who share similar goals. More specifically, participants talked about having increased hope and optimism about their future, reduced stress due to access to reliable support systems, stronger confidence in their abilities, relief from isolation and renewed connection to community, and a sense of belonging within a positive organizational culture.

Participants also often highlighted the quality of interpersonal relationships at Goodwill. Career center users described staff as patient, encouraging, and deeply committed to helping them succeed. Retail employees emphasized the morale-building environment, connection to coworkers, and supportive management. Adult learners emphasized the emotional encouragement from teachers and coaches who regularly check in, help them stay on track, and provide flexible accommodations. Several adult learners specifically described Goodwill as helping them rebuild their sense of identity, purpose, and capability after major life challenges.

GCNA's programs meaningfully improved participants' family lives by reducing stress, strengthening communication, and enabling greater stability within the household.

Participants frequently shared that their success at Goodwill had a positive ripple effect on their children, partners, and extended family members. They talked about how they are now better able to support their children academically due to their own enhanced digital literacy.

Participants also noted that they have greater emotional availability for their family members, a greater sense of pride and confidence within their family system, and that they even serve as inspiration for their relatives to pursue education and workforce training opportunities. Adult education participants, in particular, described powerful intergenerational effects. Several reported that their enrollment in school motivated children, siblings, or nieces and nephews to pursue education themselves. Others described Goodwill's childcare and transportation support as essential to maintaining family stability while continuing their own education. Retail and workforce participants also noted that improved emotional regulation, communication skills, and stress management developed through their job roles and trainings benefited interactions at home.

GCNA participation increased community involvement in a variety of ways. Some participants reported attending or volunteering at local events, supporting peers experiencing similar challenges, or sharing job and education opportunities with friends and neighbors. Others described simply being more active, confident, or socially connected as a result of their participation in Goodwill programming. Regardless of group, participants all reported a strong willingness to help others and expressed great pride in representing Goodwill in the community. Further, some long-term participants described taking on informal leadership or mentorship roles, both inside and outside of Goodwill, supporting

individuals experiencing homelessness, addiction, or life instability, and encouraging them to pursue available programs.

Participants overwhelmingly expressed strong satisfaction with Goodwill's programs and staff, frequently recommending Goodwill to friends, coworkers, and family members.

Participants emphasized that Goodwill delivers more than services... it provides encouragement, belief in potential, and a community that supports growth. Adult education participants praised the life-changing nature of the Excel Center (adult education), describing it as one of the best decisions they ever made. Retail participants frequently emphasized the supportive work culture, growth opportunities, and sense of family within Goodwill's operations. Career center participants described Goodwill as the most helpful and accessible place for job search support.

The GCNA focus group findings demonstrate that Goodwill generates significant economic and social value across the region. Participants consistently reported:

- **Improved employment outcomes and career clarity**
- **Greater financial stability and economic mobility**
- **Enhanced emotional well-being and optimism**
- **Stronger family relationships and intergenerational benefits**
- **Increased community engagement and leadership**

Beyond delivering services, Goodwill fosters a culture of dignity, empowerment, and connection. Participants frequently described Goodwill as a place where they felt seen, supported, and believed in. Across program areas, Goodwill is seen as a hub of opportunity, transforming individual lives while strengthening families and communities. The cumulative evidence underscores Goodwill's role as an indispensable partner in advancing economic mobility and social well-being across the GCNA region.

Conclusion

Together, GISA and GCNA **generate a substantial economic contribution across the State of Arizona**. Their combined presence supported and placed **10,447 jobs statewide** and generated nearly **\$408 million in labor income**, strengthening household earnings and local purchasing power. This activity translates into approximately **\$553 million in value added**, contributing meaningfully to Arizona's gross state product, and nearly **\$927 million in total economic output** as spending ripples through supply chains and local businesses. Moreover, that economic contribution is through the activities that represent a significant regional and social impact, particularly in workforce development, service delivery, and local business support. In addition, the combined impact produces more than **\$116 million in total tax revenues**, including nearly **\$32 million in state and local taxes**, supporting public services across the state.

The social impact findings reinforce and deepen this economic story. Stakeholders across both regions consistently characterized Goodwill as a **central and trusted workforce and community partner, citing strong collaboration, responsive services, and a shared mission to improve stability, skills, and long-term economic mobility**. Participants across all program areas—from youth and adults seeking employment to individuals returning from incarceration, retail employees, and adult learners—**described significant gains in employment readiness, career direction, and financial stability**. Many individuals credited Goodwill with helping them secure their first job, access critical certifications, regain confidence after long absences from the workforce, or overcome stigma tied to justice involvement. Participants also reported improved mental health, stronger family relationships, and increased community engagement, underscoring Goodwill's influence beyond job placement alone.

Taken together, these findings reveal **Goodwill as a catalyst for both economic productivity and social wellbeing, providing individuals with the skills, stability, and support needed to thrive while simultaneously strengthening the regions' economic infrastructure**. Goodwill's person-centered approach, combined with its significant operational scale, positions the organization as an indispensable contributor to workforce development, community resilience, and economic advancement across the state.

Supplemental Testimonials

- *Before GW I didn't really have a genuine connection with my family. Always a lot of arguing. GW opened my eyes in how to become a better man. A lot of us were in the youth program and didn't have a good role model to look up to, and here we have that missing piece.*
- *Made me want to help advocate for younger people that don't have supports like I didn't. Help create those opportunities to support and advocate. Helping line younger folks up with the supports I have.*
- *I'm part of youth group too. The other groups allow us to think differently and break down identifying the problem and fixing the problems. Allows me to use what I learn there and carry to my friends who also don't have role models. I appreciate the team here because they look out for us even though we aren't there's'.*
- *I always pictured GW as being a second hand store to get clothes. Coming here a year ago by the grace of god I was connected with GW. My family was worried about me being by myself. Being a part of GW gives me something, and my family isn't worried about me. Makes me feel good and makes me want to do good.*
- *I remember when I came to my initial meeting with Lisa (intake). Didn't know what I wanted to do, I told her I had a peer support certification. She hooked me up with an organization that enabled me to use that skillset which was great. I see that GW is so much more than a store. Doesn't matter what age we are...they help everybody. Everybody can feel the love and everybody can prosper. They ask what we want to do, we tell them, and they make it happen.*
- *Since I started, I actually lost a lot of family members. Moved back with my mom so she wouldn't be alone. Have been able to fix up her home to make it safer. Was able to buy my grandkids christmas this year, after not working since 2014 due to mental breakdown at the time. This is big for me...I can buy things for them, take them to park. A real sense of independence.*
- *My previous job was extremely stressful. With this job I actually get to relax and enjoy my time with family. The people I work with are like siblings, and it's very nice. When you leave at the end of the day you leave at the end of the day. Very stress free.*
- *Huge advocate for education especially when it comes to my nieces and nephews. One is 15 yo now. I became a better influence on him now. If aunty can get straight A's all year long, he finds that he can too. He's able and willing to help other nieces and nephews on school. Have been able to convince a sister to go through the program too. I have a stepson from a prior relationship and I have convinced them to come down snowbirding from Oregon to do the HS program, and with all the programs they have now in medical area she is going to do that too.*
- *Definitely. I feel like I actually have a future, like I can create it instead of whatever comes comes. I learned what integrity was here. I feel like I can actually do anything if I put my mind to it. I think that came from the training here.*

Appendix A: Partner Survey

1. What is your organization's name? _____
2. How would you describe the work your organization does?
3. How would you describe your relationship with Goodwill, in terms of your collaborative efforts?

The next questions are designed to help assess the impact that Goodwill has had on the community and region. Please rate these from the perspective of your organization.

4. Please indicate how much you agree with the following statements using a scale of 1 = completely disagree, to 5 = completely agree.
 - a. Goodwill programs and services are critical to the workforce development initiatives in the region.
 - b. Participants in Goodwill programs are adequately prepared to enter or re-enter the workforce.
 - c. Partnering with Goodwill has improved our organization's ability to meet workforce needs
 - d. Goodwill programs and services contribute positively to the region's economic vitality.
 - e. Goodwill has strengthened relationships among local businesses, nonprofits, and community members.
5. Has your organization hired individuals that participated in Goodwill programs or services? Yes/No
 - a. If Yes, approximately how many have been hired in the past 12 months? _____
 - b. If Yes, Of those hires, what proportion do you estimate are still employed at your organization after 6 months?
 - i. 0–20%
 - ii. ☐ 21–40%
 - iii. ☐ 41–60%
 - iv. ☐ 61–80%
 - v. ☐ 81–100%
 - c. If Yes, How would you rate these employees overall compared to other employees (not coming from Goodwill services or programs)?
 - i. Much worse than other employees
 - ii. Somewhat worse than other employees
 - iii. About the same as other employees
 - iv. Somewhat better than other employees
 - v. Much better than other employees
6. In your view, what role does Goodwill play in improving the regional workforce and community?
7. What other feedback can you provide to help us assess the economic and social impacts of Goodwill on the region?

Appendix B: Focus Group Protocol

1. **How has your involvement with Goodwill influenced your job situation or career path?**
(Probe: New skills, job placement, advancement, confidence in job search?)
2. **Since participating in Goodwill's services, have you noticed changes in your financial situation?** *(Probe: Ability to meet expenses, unexpected costs, budget confidence)*
3. **In what ways has your participation influenced your family's overall well-being?** *(Probe: Housing, childcare, stress, family stability, sense of hope)*
4. **Has your involvement with Goodwill affected your participation in your community?**
(Probe: Volunteering, networking, training groups, social support systems)
5. **Would you recommend Goodwill's services to others? What would you tell them?**
6. **Any other feedback?**