

MORE THAN A STORE:



THE FISCAL AND ECONOMIC IMPACTS OF GOODWILL IN FLORIDA

DECEMBER 2024

 **GOODWILL**





106 North Bronough Street, Tallahassee, FL 32301 floridatxwatch.org o: 850.222.5052 f: 850.222.7476

Piyush Patel
Chairman of the Board of Trustees

Dominic M. Calabro
President & Chief Executive Officer

DEAR FELLOW TAXPAYER,

Workforce development is critical for any economy to experience positive growth, and Florida's economy is no exception. To see growth in the labor market, there needs to be a robust and dynamic workforce to support further growth. The Florida Goodwill Association ("Goodwill") and its nine territories throughout Florida provide several impactful initiatives that help stimulate economic and workforce development by providing employment opportunities for individuals who often have barriers to entering the workforce through traditional means.

Goodwill is a national organization that has made a deep investment in Florida's workforce development programs, community services, housing services, re-entry services, and veteran and youth services that provide critical training and mentoring for program enrollees. These programs have a direct impact on Florida's communities and economy and an estimated \$1.2 billion in economic output value for 2023.

In support of increasing economic development for Florida, Florida TaxWatch undertakes this independent research project to review the nine territories of Florida Goodwill Association and their fiscal and economic output. We look forward to presenting and discussing our findings with state and local policymakers in advance of the 2025 legislative session.

Respectfully,

Dominic M. Calabro
President & Chief Executive Officer

TABLE OF CONTENTS

Key Findings.....	1
Introduction	4
Goodwill Programs and Services	5
Big Bend Territory	7
Central Florida Territory	8
Gulf Coast Territory.....	8
Gulfstream Territory	9
Manasota Territory.....	10
North Florida Territory.....	10
South Florida Territory	11
Southwest Florida Territory.....	11
Suncoast Territory	12
Statewide	12
Fiscal and Economic Impacts.....	13
Big Bend Territory	13
Gulf Coast Territory.....	14
Gulfstream Territory	14
Manasota Territory.....	15
North Florida Territory.....	15
South Florida Territory	16
Southwest Florida Territory.....	16
Suncoast Florida Territory.....	17
Statewide Impacts	17
Return on Investment.....	18
Conclusions	18

KEY FINDINGS

In 2023, Goodwill's statewide impacts (excluding those of the Central Florida territory) included economic, fiscal, and job creation and placement impacts. Each is described below:

Economic Impacts

- Provided an estimated \$1.2 billion in economic impact;
- Contributed \$652 million to Florida's GDP; and
- Added \$127 million in personal income growth across the state.

Fiscal Impacts

- Collected more than \$20 million in local and state sales tax; and
- Paid a total of \$50 million in direct and indirect tax dollars to the state.

Jobs Created and Job Placements

- One in 24 job placements in the State of Florida for the year 2023 is accredited to Goodwill;
- Employed more than 14,800 individuals within Goodwill's organization; and
- Placed more than 4,000 individuals in jobs within their local communities.

Each territory of Goodwill contributed to these statewide impacts. The individual impacts for each participating territory in terms of their economic and job-related impacts are identified below:

- Big Bend Territory:
 - \$68.9 million in economic output;
 - \$39.0 million in local GDP;
 - 997 jobs attributed to Goodwill based on all its operations;
 - \$28.0 million in personal income growth;
 - 231 job placements in the community; and
 - \$6.4 million in additional personal income through job placements.
- Gulf Coast Territory:
 - \$23.4 million in economic output;
 - \$12.4 million in local GDP;
 - 279 jobs attributed to Goodwill based on all its operations;
 - \$9.0 million in personal income growth;
 - 27 job placements in the community; and
 - \$888,000 in additional personal income through job placements.
- Gulfstream Territory:
 - \$71.1 million in economic output;
 - \$42.5 million in local GDP;
 - 986 jobs attributed to Goodwill based on all its operations;
 - \$32 million in personal income growth;
 - 126 job placements in the community; and
 - \$3.7 million in additional personal income through job placements.



- Manasota Territory:
 - \$102.6 million in economic output;
 - \$57.2 million in local GDP;
 - 1,671 jobs attributed to Goodwill based on all its operations;
 - \$42.5 million in personal income growth;
 - 446 job placements in the community; and
 - \$16.5 million in additional personal income through job placements.
- North Florida Territory:
 - \$297.8 million in economic output;
 - \$164.4 million in local GDP;
 - 3,968 jobs attributed to Goodwill based on all its operations;
 - \$123.6 million in personal income growth;
 - 1,686 job placements in the community; and
 - \$54.5 million in additional personal income through job placements.
- South Florida Territory:
 - \$261.8 million in economic output;
 - \$154.7 million in local GDP;
 - 3,362 jobs attributed to Goodwill based on all its operations;
 - \$116.3 million in personal income growth;
 - 46 job placements in the community; and
 - \$1.5 million in additional personal income through job placements.
- Southwest Florida Territory:
 - \$159.5 million in economic output;
 - \$90.2 million in local GDP;
 - 2,209 jobs attributed to Goodwill based on all its operations;
 - \$69.6 million in personal income growth;
 - 314 job placements in the community; and
 - \$8.4 million in additional personal income through job placements.
- Suncoast Territory:
 - \$114.3 million in economic output;
 - \$63.2 million in local GDP;
 - 1,132 jobs attributed to Goodwill based on all its operations;
 - \$43.5 million in personal income growth;
 - 1,362 job placements in the community; and
 - \$35 million in additional personal income through job placements.

Goodwill is a classic example of the positive impacts that organizations can have at the community and state levels through job placements, increasing personal income, and producing a robust workforce. The approach that Goodwill uses to fund their programs through donations not only shows its savvy business model, but also its investment and dedication to provide services to people in need. This approach has not only produced impressive results for the workforce but has also improved local economies, which directly enhances the statewide economy as well.

Goodwill has a unique and effective business model that provides tangible benefits to local communities and to the state of Florida. It not only provides training programs for individuals seeking career advice and changes, but also prepares individuals to re-enter society after incarceration with targeted programs that are community-based.

The consistent investment in local communities that Goodwill provides is realized through the economic impacts it makes across the state. Goodwill's statewide economic impact reaches almost \$1.2 billion and provides dynamic employment opportunities and contributes a substantial amount to the state's total GDP production. These contributions not only help Florida's economy grow, but they contribute to a workforce that is more likely to stay within the state throughout their productive working lives because these investments are made at a local and community-based level.

Transforming Donations into Opportunities

Goodwill exemplifies how innovative organizations can uplift communities and the state economy through:

- Job Placements that enhance personal income and strengthen the workforce.
- Career Training Programs to empower individuals with skills and career pathways.
- Re-Entry Support for those transitioning from incarceration to meaningful community roles.

A \$1.2 Billion Impact

Goodwill's community-focused investments drive substantial economic benefits:

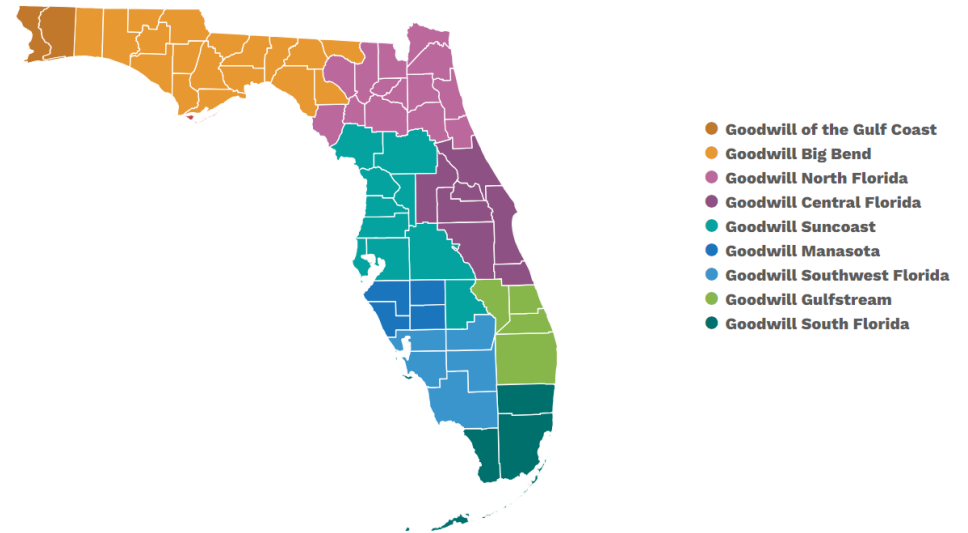
- Boosting Local Economies: Strengthening neighborhoods and supporting small businesses.
- Contributing to State GDP: Generating growth through employment and productivity.
- Retaining Talent in Florida: Creating opportunities that encourage long-term residency.

INTRODUCTION

The Florida Goodwill Association (Goodwill) is best known for its community involvement and most people are familiar with its business model of accepting donations and selling those donated items in their retail stores. The proceeds from these sales go directly toward operational costs and provide funding for Goodwill's various programs. Goodwill is also known for providing employment opportunities to persons with disabilities and individuals with other barriers to obtaining employment.¹ After operating in Florida for more than 50 years, Goodwill continues to provide numerous benefits to Floridians by using its sustainable business model of selling donated goods.

Goodwill has a significant footprint in Florida, with its nine established territories. These territories include the Big Bend, Central Florida, Gulf Coast, Gulfstream, Manasota, North Florida, South Florida, Southwest Florida, and Suncoast (Figure 1).² Each of these territories provides critical services and programs that are focused on the direct needs of each community.

Figure 1. Map of Florida Goodwill Association Territories³



Source: Florida Goodwill Association

Through its business model, Goodwill sells donated items and the net proceeds from those sales are used to pay for the employees working in those locations and across the state and to fund its job training, job placement, and community programs. Goodwill focuses on hiring individuals with disabilities or those with a different impediment to employment. There are about 200 Goodwill retail stores across the state and more than 10,000 Floridians are employed at these stores. In addition to direct employment opportunities, Goodwill provides employment training to more than 82,000 people through its programs.⁴

This business model also grants Goodwill the ability to deliver career opportunities, workforce training, and youth services for Floridians with disabilities and to others experiencing barriers to employment.

¹ Florida Goodwill Association, "Statistics," retrieved from <https://floridagoodwills.org/statistics/>, accessed on October 17, 2023.

² Florida Goodwill Association, "Program Summary," March 2023.

³ Note: The Florida Goodwill Association's territory map is subject to change in 2024 due to changes in business operations between the Manasota and Gulfstream territories and adding clarification for the division of business operations and services provided in Okaloosa County which are divided between the Big Bend and Gulf Coast territories.

⁴ Florida Goodwill Association, "Florida Goodwill Association Highlights For 2021," retrieved from <https://floridagoodwills.org/statistics/>, accessed on October 18, 2023.

Ninety percent of the dollars earned by Goodwill territories in Florida go directly to program activities. This is significantly higher than the 65 percent minimum established by the Better Business Bureau’s Standards for Charity Accountability.⁵

Florida TaxWatch undertakes this independent research project to examine Goodwill’s contribution to the workforce and communities across the state and to estimate the economic and fiscal impacts of Goodwill. Using performance data provided by eight Goodwill territories,⁶ Florida TaxWatch will “tell the story” of Goodwill and how its programs and services benefit the more than 142,000 persons who participated in 2023.

Using the IMPLAN input-output economic software model, Florida TaxWatch will use Goodwill expenditure data (inputs) to estimate the direct, indirect, and induced effects (outputs) of Goodwill on Florida’s economy. These direct, indirect, and induced effects refer to the “ripple” effects on the economy from those expenditures. Direct effects refer to changes that occur in “front-end” businesses that would initially receive expenditures and operating revenue as a direct consequence of the operations and activities. Indirect effects refer to the business-to-business purchases in the supply chain taking place in the territory that stems from the initial industry manufacturing. As Goodwill spends money in the territory with its suppliers, it generates an indirect effect. Induced effects refer to the value from household spending of labor income after removing taxes, savings, and commuter income. The induced effects generate expenditures of the employees within Goodwill’s supply chain.

GOODWILL PROGRAMS AND SERVICES

Goodwill is one of many impactful organizations that is helping individuals who often have significant barriers to entering the workforce. There are many programs that Goodwill provides across the state that yield impactful contributions to local and state economies and communities. Each of these initiatives makes an impact across the state along with each Goodwill territory. Not every program is available in every territory, but the overall impact that Goodwill is making is felt across the state as the organization promotes workforce development, economic and fiscal growth.

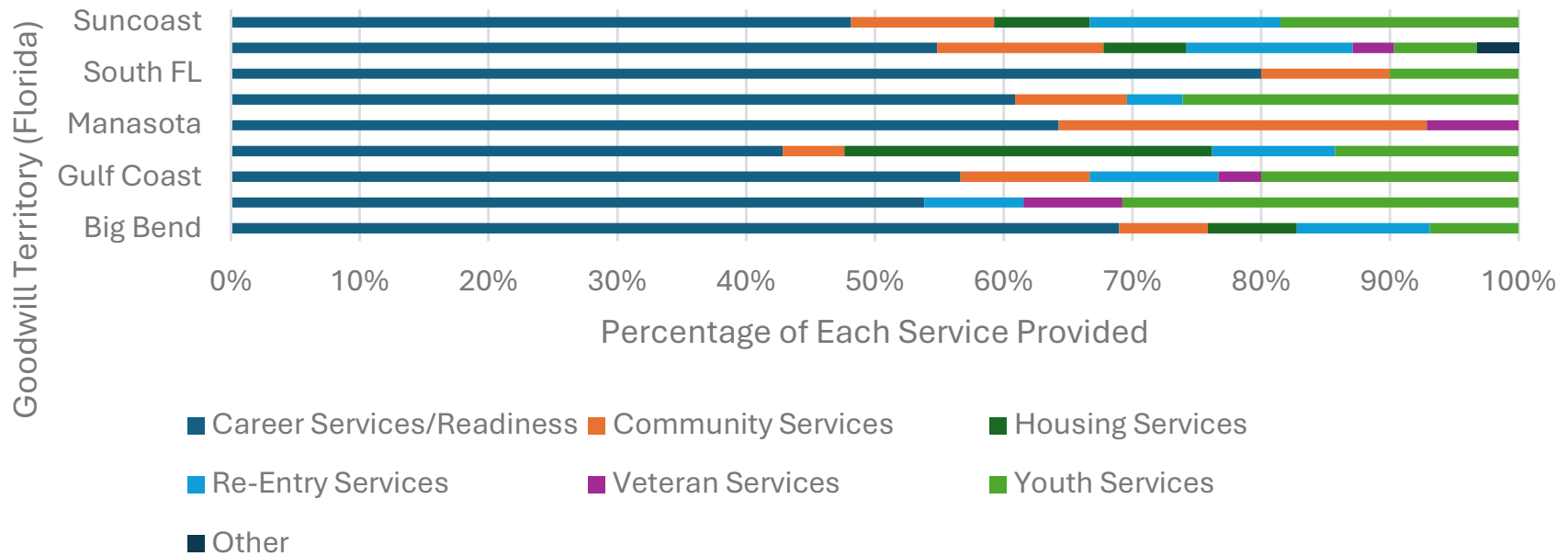
Each of the nine Goodwill territories has a unique combination of program offerings. These program offerings are grouped into seven categories with each having numerous subcategories customized for each territory’s needs (Figure 2):

- Career services/readiness,
- Community services,
- Housing services,
- Re-entry services,
- Veteran services,
- Youth services, and
- Other

⁵ Better Business Bureau, “BBB Standards for Charity Accountability,” retrieved from <https://give.org/donor-landing-page/bbb-standards-for-charity-accountability>, accessed on October 17, 2023.

⁶ The central Florida territory chose not to participate in this study.

Figure 2. Goodwill Provides a Wide Variety of Programs Across the State



Source: Florida Goodwill Association⁷

CAREER COUNSELING: Through public and private partnerships Goodwill offers career counseling that helps individuals form critical workforce skills. This program focuses on three main goals: helping people explore job opportunities that fit their skillset; developing new skills through free online learning platforms; and resume and job application assistance.⁸ These program offerings provide participants with free access to these resources and help to expand Florida’s workforce quality by providing these services to individuals seeking career development skills who may not be able to obtain them otherwise.

WORKFORCE DEVELOPMENT: This program provides on-the-job training and job placements for individuals with disabilities. Many of these programs are

based in a community-based employment setting and are only for a limited time before the participant continues with a similar job after completing the training process. Participants in this program often interact and work with individuals without disabilities and are paid at or above minimum wage.⁹

COMMUNITY JOB PLACEMENT PROGRAM: Goodwill’s Community Job Placement Program is centered around career counseling, workforce development, and job placement activities. In 2023, a total of 19,126 people were employed at a Goodwill organization or were placed in jobs through Goodwill’s employment programs.¹⁰ In comparison, Florida hired 466,000 new employees during 2023,¹¹ meaning that Goodwill was responsible for 1-in-24 job placements for that year.

⁷ Supra, see footnote 2.

⁸ Florida Goodwill Association, “Self-Paced Resources to Help You Find a Job and Advance Your Career,” retrieved from <https://www.goodwill.org/job-seekers/career-resources/>, accessed on October 17, 2023.

⁹ Goodwill Industries of Central Florida, “Community Employment and Training,” retrieved from <https://www.goodwillcfl.org/services/employment-training/>, accessed on October 17, 2023.

¹⁰ Combined data from all Goodwill territories analyzed by Florida TaxWatch. Note: the number of people employed at Goodwill was added to the number of people placed from Goodwill’s placement programs for each of the participating territories to get this number.

¹¹ United States Bureau of Labor Statistics, “Job Openings and Labor Turnover Survey Original Data Value-Hires,” United States Department of Labor, accessed on July 19, 2024.

BIG BEND TERRITORY

The Big Bend territory (see Figure 1) primarily focuses on career services/readiness and re-entry services. This territory serves 18 counties, including Eastern Okaloosa, Walton, Holmes, Washington, Bay, Jackson, Calhoun, Gulf, Liberty, Franklin, Gadsden, Wakulla, Leon, Jefferson, Madison, Taylor, Lafayette, and Dixie. The Learning Pavilion is one of the territory's most impactful programs featuring an inclusive preschool and childcare services to more than 150 children in the area.¹² These services include education and on-site therapy for children with special needs.

Many of the career services/readiness programs offered in this territory involve accounting, healthcare, General Education Development (GED) classes, hospitality, information technology support, job coaching, online certificates, among several others.¹³ This territory also provides tax preparation and literacy support through its community services program as well as eight locations that assist with finding housing options for persons with disabilities and low-income elders. Additionally, this territory has a few re-entry programs for adults and youth and provides a program for these individuals to gain life skills such as parenting, relationship building, and communication skills.¹⁴ These services are funded by donations to this territory and cover 90 percent of the territory's program expenses.¹⁵

Big Bend Territory

Number of People Served in 2023	Placement Program Employment	Personal Income (in \$millions)	Recycled Material (in millions of pounds)
6,068	232	\$7.40	29.70

Source: Combined data from all Goodwill territories analyzed by Florida TaxWatch

Through the territory's community placement programs, an additional \$6.4 million in personal income is added to the community through 232 job placements.¹⁶ This territory provided services and programs to 6,068 individuals in 2023. The Big Bend territory also diverted 28.7 million pounds of recyclable materials from landfills in 2023 through its recycling initiatives.¹⁷

Big Bend Territory Highlights

- 6,068 Individuals Served through career, re-entry, and community services.
- 232 Job Placements, adding \$6.4 million in personal income to the community.
- 28.7 Million Pounds of materials recycled, supporting sustainability efforts.

From career readiness programs to inclusive childcare at The Learning Pavilion, the Big Bend territory exemplifies Goodwill's mission of creating opportunities and improving lives.

¹² July 3, 2024, Keyna Cory, email received by Jessica Cimijotti.

¹³ Supra, see footnote 2.

¹⁴ Goodwill Industries International, "Services for Formerly Incarcerated Individuals," retrieved from <https://www.goodwill.org/goodwill-for-you/services-for-formerly-incarcerated-individuals/>, accessed on November 13, 2023.

¹⁵ Supra, see footnote 11.

¹⁶ IMPLAN by Florida TaxWatch

¹⁷ Supra, see footnote 11.

CENTRAL FLORIDA TERRITORY

The Central Florida territory chose not to participate in this study.

GULF COAST TERRITORY

The Gulf Coast territory has one of the largest program offerings in the state (see Figure 2), serving Santa Rosa and Escambia counties along with half of Okaloosa County. The Gulf Coast territory also serves seven counties in Alabama. Programs in this area include career services/readiness, community services, re-entry services, veteran services, and youth services. Some programs unique to this area include military respite services, information technology support professional training, youth re-entry programs, and others.¹⁸ The territory also contracts with the Escambia County School System to provide high school students with special needs to receive hands-on instruction and work experiences at Goodwill retail stores in the surrounding areas through its “Escambia County School Program”. This territory provided these programs and services to 3,766 individuals in 2023.¹⁹

Much of the territory’s focus is working with persons with disabilities or those who have other disadvantaged conditions, such as limited access to medical and educational facilities. Through this territory’s High School High Tech program, youth aged 12-22 with disabilities can engage in career-oriented activities that help inspire participants to graduate high school and attract high-demand jobs in relevant industries.²⁰ In addition to working with these youth, the territory also works with the Department of Juvenile Justice and the Escambia County school system to further engage youth in these communities.

Gulf Coast Territory

Number of People Served in 2023	Placement Program Employment	Personal Income (in \$millions)	Recycled Material (in millions of pounds)
3,766	27	\$0.89	20.90

Source: Combined data from all Goodwill territories analyzed by Florida TaxWatch

Through the territory’s job placement program an additional 27 jobs and \$888,000 in personal income is added to these communities.²¹ The Gulf Coast territory also diverted 20.9 million pounds of recyclable materials from landfills in 2022.²²

Gulf Coast Territory Highlights

- 3,766 Individuals Served through diverse programs, including veteran and youth services.
- 27 Job Placements, adding \$888,000 in personal income to local communities.
- 20.9 Million Pounds of materials recycled, promoting environmental sustainability.

Unique programs like High School High Tech and military respite services showcase the Gulf Coast territory’s commitment to empowering individuals with disabilities and creating opportunities for youth and veterans alike.

¹⁸ Supra, see footnote 2.

¹⁹ May 16, 2024, Keyna Cory, email received by Jessica Cimijotti

²⁰ Goodwill Gulf Coast, “Empowering People Through Lifelong learning and Employment,” accessed on July 17, 2024, retrieved from <https://www.gesgc.org/>.

²¹ Supra, see footnote 15.

²² May 16, 2024, Ginny Turner, email received by Keyna Cory.

GULFSTREAM TERRITORY

The Gulfstream territory serves five counties (Palm Beach, Martin, St Lucie, Indian River, and Okeechobee) along the central Florida coast. In 2023 alone, the territory provided support services for more than 3,000 individuals within these communities. Many of these support services include adult day training, workforce training, job development, and justice services. This territory runs the Career Academy, a public charter school, that operates in Palm Beach County. It supports high school students ages 14 to 22 that have developmental disabilities. It uses a “Project Search” model of training and hands-on vocational training skills for students within its curriculum. The Career Academy has an 80 percent success rate for employment for its students upon completion of the program.²³ In addition to the public charter school, this territory operates four homeless shelters throughout Palm Beach County and has 170 “scatter site permanent housing” units along with 30 affordable housing units. These housing services helped provide housing to more than 1,400 individuals and families in 2023.²⁴

Gulfstream Territory

Number of People Served in 2023	Placement Program Employment	Personal Income (in \$millions)	Recycled Material (in millions of pounds)
3,165	126	\$3.70	9.50

Source: Combined data from all Goodwill territories analyzed by Florida TaxWatch

Through the territory’s job placement programs, 126 jobs and \$3.7 million in personal income were added to this territory.²⁵ In addition, more than 3,000 individuals utilized programs and resources from this territory in 2023. The Gulfstream territory also sold or diverted 9.5 million pounds of donations from landfills in 2023.²⁶

²³ October 15, 2024, Lisa Mason, email received by Keyna Cory.

²⁴ Ibid.

²⁵ Supra, see footnote 15.

²⁶ May 15, 2024, Lisa Mason, email received by Keyna Cory.

Gulfstream Territory Highlights

- 3,165 Individuals Served through workforce training, housing, and justice services.
- 126 Job Placements, contributing \$3.7 million in personal income to the local economy.
- 9.5 Million Pounds of donations diverted from landfills.

With initiatives like the Career Academy, achieving an 80% employment success rate for students with developmental disabilities, and housing support for over 1,400 individuals and families, the Gulfstream territory demonstrates its commitment to transforming lives and building stronger communities.

MANASOTA TERRITORY

The Manasota territory covers several counties along the western part of central Florida (see Figure 1) and provides a wide range of services for communities in the area. This territory employs more than 1,400 individuals with more than 70 percent of those individuals' experiencing barriers to employment.²⁷ Many of the programs include life coaching, case management, skills training, upskilling services, and supportive employment for those with disabilities. The services provided by this territory are 97 percent funded through the sale of donated goods in this territory.²⁸ In 2023, Goodwill Manasota and Goodwill Gulfstream began coordinated efforts to expand the donated goods business while maintaining support for the existing external mission programs in the area. By 2024, the Manasota territory assumed control over the donated goods business for both territories while the Gulfstream territory continued to support the external mission programs in this area. This collaboration aims to help enhance service delivery and community impacts while operating the key aspects of Goodwill's business model based on the needs for each of the territories.

Manasota Territory

Number of People Served in 2023	Placement Program Employment	Personal Income (in \$millions)	Recycled Material (in millions of pounds)
4,412	446	\$16.50	5.60

Source: Combined data from all Goodwill territories analyzed by Florida TaxWatch

The Manasota territory served 4,412 individuals through its various programs and resources in 2023. This territory also contributes 446 job placements which adds \$16.5 million in personal income to these communities through its job placement programs.²⁹ In addition to the economic impacts provided by this territory, Goodwill Manasota diverted 5.6 million pounds of recyclable materials from landfills in 2023.³⁰

²⁷ June 27, 2024, Margie Genter, email received by Keyna Cory.

²⁸ Ibid.

²⁹ Supra, see footnote 15.

³⁰ May 14, 2023, Margie Genter, email received by Keyna Cory.

³¹ July 8, 2024, Dane McGraw, email received by Keyna Cory.

³² Supra, see footnote 15.

NORTH FLORIDA TERRITORY

Goodwill's North Florida territory covers 14 counties along Florida's first coast area and the north-central territory of the state. Most of its programs focus on workforce development and helping individuals gain financial stability and independence. This territory has several programs that help youth and adults gain these workforce and critical life skills. The Take Stock in Children is a statewide program that provides mentoring services for students seeking higher education and scholarship opportunities. In the North Florida territory, 450 students have participated in the program with a 100 percent high school graduation rate.³¹

A-STEP (Academic Support Through the Employment Process) is another program offered by the territory that helps adults develop workforce skillsets and educational upskilling through partnerships with local state colleges. The North Florida territory reinvests \$0.90 of every dollar spent in their stores back into their programs for the territory helping provide resources and services for community members in need.

North Florida Territory

Number of People Served in 2023	Placement Program Employment	Personal Income (in \$millions)	Recycled Material (in millions of pounds)
20,756	1,686	\$54.50	12.90

Source: Combined data from all Goodwill territories analyzed by Florida TaxWatch

In 2023, this territory served over 20 thousand individuals through its various programs. Through its job placement programs, this territory adds an additional 1,686 job placements and \$54.5 million in additional personal income to the community.³² The North Florida territory also diverted 12.9 million pounds of recyclable materials from landfills in 2023.

SOUTH FLORIDA TERRITORY

The South Florida territory provides a wide range of resources and services to Florida’s three southernmost counties (Broward, Miami-Dade, and Monroe). South Florida’s Goodwill territory houses a manufacturing facility, Goodwill Ryder Apparel, where 75 percent of those employed are persons with disabilities or face barriers to work. These individuals work to create combat and non-combat apparel for the United States Army and American flags (mostly used as interment flags) for the Department of Veterans Affairs. This manufacturing facility provides more than 750,000 manufactured apparel and flags in 2023 to various customers throughout the country.³³ This territory has helped more than 200 individuals who were previously incarcerated enter into the workforce in 2023. Additionally, 48 individuals received Google certificates, on-the-job-training, digital skills, or another similar workforce skillset in 2023 from programs offered in this territory.³⁴

South Florida Territory

Number of People Served in 2023	Placement Program Employment	Personal Income (in \$millions)	Recycled Material (in millions of pounds)
3,740	46	\$1.50	54.00

Source: Combined data from all Goodwill territories analyzed by Florida TaxWatch

The South Florida territory served 3,740 individuals through its programs and services in 2023, out of which 1,265 were individuals with disabilities and 2,475 were individuals with work barriers. The South Florida territory also provided 46 job placements and \$1.5 million in personal income through its job placement programs. The South Florida territory also diverted 54.0 million pounds of recyclable materials from landfills in 2023.

³³ October 24, 2024, Darrell Cunningham, email received by Keyna Cory.

³⁴ May 18, 2024, Darrell Cunningham, email received by Keyna Cory.

³⁵ October 24, 2024, Cindy Crippen, email retrieved by Keyna Cory.

³⁶ Supra, see footnote 15.

SOUTHWEST FLORIDA TERRITORY

Goodwill’s Southwest territory serves Collier, Lee, Hendry, Glades, and Charlotte counties and provides the greatest number of services to community members (see Figure 2). Many of the territory’s programs are centered around helping individuals become independent. The “Community Resource Centers” and “Pathways to Work” programs in this territory help train individuals to enter the workforce through educational and on-the-job training. Another program offered by this territory is its MicroEnterprise Institute, created in 2010, has since graduated more than 1,000 people with more than 600 businesses either sustained or started after individuals completed the institute.³⁵

Southwest Florida Territory

Number of People Served in 2023	Placement Program Employment	Personal Income (in \$millions)	Recycled Material (in millions of pounds)
22,459	314	\$8.40	23.50

Source: Combined data from all Goodwill territories analyzed by Florida TaxWatch

The Southwest Florida territory served more than 22 thousand individuals in 2023 through its various programs and services. Additionally, through its community placement programs, this territory adds 314 job placements and \$8.4 million in personal income.³⁶ The Southwest Florida territory also diverted 23.5 million pounds of recyclable materials from landfills in 2023.

SUNCOAST TERRITORY

The Suncoast territory covers a large portion of the western-central part of the state (see Figure 1). The Suncoast territory focuses on providing career readiness, community services, and youth services and served 77,422 individuals in 2023.³⁷ Several of these programs involve providing resources to youth within these communities. An initiative called “Belle of the Ball” provides formal event dresses to young women who otherwise would not be able to afford them for prom, homecoming, or other formal events.

Another program is a partnership with Junior Achievement to help eighth graders improve their financial literacy and workforce readiness.³⁸ There are several other programs for this territory ranging from re-entry services to reducing human trafficking initiatives that focus on providing services for individuals within these communities.

Suncoast Territory

Number of People Served in 2023	Placement Program Employment	Personal Income (in \$millions)	Recycled Material (in millions of pounds)
77,422	1,362	\$35.00	42.47

Source: Combined data from all Goodwill territories analyzed by Florida TaxWatch

Through its job placement programs this territory provided 1,362 jobs placements that added \$35 million in personal income to the community.³⁹ In addition, the Suncoast territory diverted 42.5 million pounds of recyclable materials from the landfill in 2023.

³⁷ May 14, 2024, Hailey Bethune, email retrieved by Keyna Cory.

³⁸ Ibid.

³⁹ Supra, see footnote 15.

STATEWIDE

Each Goodwill territory provides a substantial impact within each of the communities that they serve. Looking at the individual territories’ workforce and community development impacts only tells part of the story. Many of the territories have overlapping services and provide resources to individuals from across the state.

Statewide Territory

Number of People Served in 2023	Placement Program Employment	Personal Income (in \$millions)	Recycled Material (in millions of pounds)
141,788	4,239	\$127.89	197.40

Source: Combined data from all Goodwill territories analyzed by Florida TaxWatch

Statewide, Goodwill served 141,788 individuals in 2023. This was possible because Goodwill utilized their wide range of programs and resources throughout the state to help communities develop necessary skillsets and contribute to state and local economies. More than 4,000 individuals were placed in jobs within their communities which added an additional \$127.89 million in personal income statewide. Additionally, 197.40 million pounds (98,700 tons) of recycled material was either sold or diverted from landfills statewide in 2023 due to Goodwill.

FISCAL AND ECONOMIC IMPACTS

Florida TaxWatch uses data received directly from each individual Goodwill territory to calculate its fiscal and economic impact. Using the employment, operational, and capital data of Goodwill, IMPLAN generates an impact on the following variables:

- Job Creation – The number of jobs created directly and indirectly as a result of Goodwill’s functioning.
- Personal Income – The total dollar value created as income for employment created, as a result of Goodwill’s functioning.
- Gross Domestic Product – Also known as value added, this is the dollar amount created by Goodwill through its products and services, in other words, Goodwill’s addition to Florida’s economy.
- Total Economic Impact – The dollar impact Goodwill has on all sectors of the economy, from manufacturing to the final products created directly or indirectly because of its operations.

BIG BEND TERRITORY

The Big Bend Goodwill territory provides an estimated \$68.9 million in economic impacts and attributes nearly 1,000 jobs as a result of the territory’s 2023 operational activities. These jobs contribute \$28.5 million in personal wages and add \$39.0 million in local GDP for the territory.⁴⁰ This territory also contributed to the collection of \$2.5 million in local and state sales tax in 2023.⁴¹

Table 1. Economic Impacts Snapshot for Florida Goodwill Big Bend Territory

	Jobs	Personal Income (in \$millions)	Value Added (GDP) (in \$millions)	Total Output (in \$millions)
Direct	836.17	\$20.80	\$23.50	\$39.70
Indirect	72.16	\$3.40	\$6.40	\$13.80
Induced	89.09	\$4.30	\$9.10	\$15.40
Total	997.42	\$28.50	\$39.00	\$68.90

Source: IMPLAN by Florida TaxWatch (in \$millions)

Big Bend Territory Economic Highlights

In 2023, the Big Bend Goodwill territory delivered significant economic benefits:

- Nearly 1,000 Jobs Created, contributing to the region’s workforce stability.
- \$28.5 Million in Personal Wages earned by workers in the territory.
- \$39 Million in Local GDP Added, bolstering economic growth.
- \$68.9 Million Total Economic Impact, showcasing the territory’s influence across industries.
- \$2.5 Million in Local and State Sales Tax collected, supporting public services.

⁴⁰ The acronym “GDP” stands for “Gross Domestic Product” and it measures the value of goods and services produced in a country over a set period and is typically measured quarterly or yearly.

⁴¹ This value includes a local Panama City (local) sales tax.

GULF COAST TERRITORY

The estimated 2023 economic impact of the Gulf Coast territory is \$23.4 million and adds \$12.4 million in local GDP. These programs also provide 279 jobs (in Florida alone) as a result of the territory's operational activities which contribute \$9.3 million in annual wages for the territory. This territory collected \$506,767 in local and state sales tax income for 2023.

Table 2. Economic Impacts Snapshot for Florida Goodwill Gulf Coast Territory

	Jobs	Personal Income (in \$millions)	Value Added (GDP) (in \$millions)	Total Output (in \$millions)
Direct	217	\$6.40	\$6.90	\$12.70
Indirect	29.35	\$1.30	\$2.30	\$5.20
Induced	32.01	\$1.60	\$3.20	\$5.50
Total	278.36	\$9.30	\$12.40	\$23.40

Source: IMPLAN by Florida TaxWatch (in \$millions)

GULFSTREAM TERRITORY

The estimated 2023 economic impact of the Gulfstream territory is \$71.0 million and contributes \$41.9 million to the territory's GDP. These programs also provide nearly 1,000 jobs as a result of the territory's operational activities which contribute \$32.0 million in annual wages for the territory. This territory collected \$2.2 million in local and state sales tax for 2023.

Table 3. Economic Impacts Snapshot for Florida Goodwill Gulfstream Territory

	Jobs	Personal Income (in \$millions)	Value Added (GDP) (in \$millions)	Total Output (in \$millions)
Direct	821	\$22.70	\$24.90	\$39.90
Indirect	82.22	\$4.60	\$8.00	\$16.30
Induced	83.58	\$4.70	\$9.00	\$14.80
Total	986.8	\$32.00	\$41.90	\$71.00

Source: IMPLAN by Florida TaxWatch (in \$millions)

Gulf Coast Territory Economic Highlights

In 2023, the Gulf Coast Goodwill territory made a significant economic impact:

- \$23.4 Million Total Economic Impact, driving local growth.
- \$12.4 Million in Local GDP, contributing to community prosperity.
- 279 Jobs Created within Florida, providing stability and opportunity.
- \$9.3 Million in Annual Wages earned by workers.
- \$506,767 in Sales Tax Revenue collected, supporting public services.

Gulfstream Territory Economic Highlights

In 2023, the Gulfstream Goodwill territory achieved remarkable economic results:

- \$71.0 Million Total Economic Impact, supporting regional development.
- \$41.9 Million in Local GDP, driving economic growth.
- Nearly 1,000 Jobs Created, enhancing employment opportunities.
- \$32.0 Million in Annual Wages, boosting household incomes.
- \$2.2 Million in Sales Tax Revenue, funding local and state services.

MANASOTA TERRITORY

The Manasota Goodwill territory provides an estimated \$102.6 million in economic impacts and \$57.2 million in local GDP. It also contributed more than 1,600 jobs as a result of the territory's operational activities and has an impact of \$42.5 million in personal income wages for 2023. This territory collected \$3.5 million in local and state sales tax in 2023.

Table 4. Economic Impacts Snapshot for Florida Goodwill Manasota Territory

	Jobs	Personal Income (in \$millions)	Value Added (GDP) (in \$millions)	Total Output (in \$millions)
Direct	1,416.75	\$29.40	\$33.10	\$56.90
Indirect	127.41	\$6.50	\$11.00	\$23.50
Induced	127.05	\$6.60	\$13.10	\$22.20
Total	1,671.20	\$42.50	\$57.20	\$102.60

Source: IMPLAN by Florida TaxWatch (in \$millions)



Manasota Territory Economic Impact Highlights

Supporting communities across the Manasota region, Goodwill made substantial contributions to local economic growth, workforce development, and tax revenues.

- Total Economic Output: \$102.6 million
- Local GDP Contribution: \$57.2 million
- Jobs Supported: Over 1,600 positions
- Personal Income: \$42.5 million in wages
- Tax Revenue: \$3.5 million in local and state sales tax

NORTH FLORIDA TERRITORY

The territory contributed nearly 4,000 jobs as a result of its 2023 operational activities and provided \$123.6 million in annual earnings for the area. The territory's total estimated economic impacts equal \$297.8 million and add \$164.4 to the territory's GDP. This territory also collected \$2.4 million in local and state sales tax in 2023.

Table 5. Economic Impacts Snapshot for North Florida Goodwill Territory

	Jobs	Personal Income (in \$millions)	Value Added (GDP) (in \$millions)	Total Output (in \$millions)
Direct	3,129.89	\$76.70	\$79.30	\$139.40
Indirect	374.58	\$21.10	\$34.80	\$72.00
Induced	463.86	\$25.80	\$50.30	\$86.40
Total	3,968.33	\$123.60	\$164.40	\$297.80

Source: IMPLAN by Florida TaxWatch (in \$millions)



North Florida Territory Economic Impact Highlights

Strengthening the North Florida region's economy, Goodwill generated robust job opportunities, substantial income, and vital tax revenues.

- Total Economic Output: \$297.8 million
- Local GDP Contribution: \$164.4 million
- Jobs Supported: Nearly 4,000 positions
- Personal Income: \$123.6 million in earnings
- Tax Revenue: \$2.4 million in local and state sales tax

SOUTH FLORIDA TERRITORY

The estimated 2023 economic impact of the South Florida territory is \$261.8 million and contributes \$154.7 million in local GDP. These programs also provide 3,362 jobs as a result of the territory's operational activities which contribute \$116.2 million in annual wages for the territory. This territory also collected \$5.3 million in local and state sales tax in 2023.

Table 6. Economic Impacts Snapshot for South Florida Goodwill Territory

	Jobs	Personal Income (in \$millions)	Value Added (GDP) (in \$millions)	Total Output (in \$millions)
Direct	2,641.00	\$77.80	\$83.10	\$126.80
Indirect	310.24	\$15.90	\$28.20	\$59.90
Induced	411.14	\$22.50	\$43.40	\$75.10
Total	3,362.38	\$116.20	\$154.70	\$261.80

Source: IMPLAN by Florida TaxWatch (in \$millions)

South Florida Territory Economic Impact Highlights

Advancing economic vitality in the South Florida region, Goodwill created jobs, supported local income, and generated substantial tax revenues.

- Total Economic Output: \$261.8 million
- Local GDP Contribution: \$154.7 million
- Jobs Supported: Over 3,360 positions
- Personal Income: \$116.2 million in wages
- Tax Revenue: \$5.3 million in local and state sales tax

SOUTHWEST FLORIDA TERRITORY

The estimated 2023 economic impact of the Southwest Florida territory is \$159.5 million and adds \$90.3 million in local GDP. These programs also provide 2,210 jobs as a result of the territory's operational activities which contribute \$69.6 million in annual wages for the territory. This territory also collected \$3.2 million in local and state sales tax in 2023.

Table 7. Economic Impacts Snapshot for Southwest Florida Goodwill Territory

	Jobs	Personal Income (in \$millions)	Value Added (GDP) (in \$millions)	Total Output (in \$millions)
Direct	1,829.46	\$50.50	\$53.90	\$90.00
Indirect	190.65	\$9.10	\$15.90	\$35.50
Induced	189.85	\$10.00	\$20.50	\$34.00
Total	2,209.96	\$69.60	\$90.30	\$159.50

Source: IMPLAN by Florida TaxWatch (in \$millions)

Southwest Florida Territory Economic Impact Highlights

Fueling economic growth in the Southwest Florida region, Goodwill supported job creation, generated local income, and contributed to tax revenues.

- Total Economic Output: \$159.5 million
- Local GDP Contribution: \$90.3 million
- Jobs Supported: Over 2,200 positions
- Personal Income: \$69.6 million in wages
- Tax Revenue: \$3.2 million in local and state sales tax

SUNCOAST TERRITORY

The estimated 2023 economic impact of the Suncoast territory is \$114.2 million and contributes \$63.2 million in local GDP. These programs also provide over 1,100 jobs as a result of the territory's operational activities which contribute \$43.5 million in annual wages for the territory. This territory also collected \$4.2 million in local and state sales tax in 2023.

Table 8. Economic Impacts Snapshot for Florida Goodwill Suncoast Territory

	Jobs	Personal Income (in \$millions)	Value Added (GDP) (in \$millions)	Total Output (in \$millions)
Direct	809.72	\$26.20	\$31.30	\$54.10
Indirect	153.01	\$8.10	\$13.90	\$28.90
Induced	168.77	\$9.20	\$18.00	\$31.30
Total	1,131.51	\$43.50	\$63.20	\$114.20

Source: IMPLAN by Florida TaxWatch (in \$millions)

STATEWIDE IMPACTS

Goodwill and its operations create over 14,888 jobs and have an impact of \$481.6 million in personal income.⁴² The total economic output for Goodwill is more than \$1 billion and adds approximately \$652 million annually to Florida's GDP. In addition to these economic outputs, Goodwill collects more than \$20 million in sales tax, which is paid to the state and has a total impact of \$50 million in direct and indirect tax dollar contributions to the state.⁴³

Table 9. Statewide Economic Impacts Snapshot for Florida Goodwill Association

	Jobs	Personal Income (in \$millions)	Value Added (GDP) (in \$millions)	Total Output (in \$millions)
Direct	11,700.98	\$310.60	\$336.10	\$559.50
Indirect	1,502.13	\$79.80	\$136.60	\$288.50
Induced	1,684.62	\$91.20	\$179.30	\$306.20
Total⁴⁴	14,887.73	\$481.60	\$652.00	\$1,154.20

Source: IMPLAN by Florida TaxWatch (in \$millions)

Suncoast Territory Economic Impact Highlights

In 2023, Goodwill's presence in the Suncoast region generated significant economic value—creating jobs, strengthening local incomes, and boosting tax revenues.

- Total Economic Output: \$114.2 million
- Local GDP Contribution: \$63.2 million
- Jobs Supported: Over 1,100 positions
- Personal Income: \$43.5 million in wages
- Tax Revenue: \$4.2 million in local and state sales tax

Statewide Economic Impact Highlights

Goodwill's activities throughout Florida deliver substantial economic benefits—supporting thousands of jobs, raising incomes, and generating significant tax revenues for the state.

- Total Economic Output: Over \$1 billion
- Local GDP Contribution: Approximately \$652 million
- Jobs Supported: Nearly 14,900 positions
- Personal Income: \$481.6 million in wages
- Tax Revenues: \$20+ million in sales tax, with a total tax impact of \$50 million

⁴² Note: This total does not include the total number of individuals placed in jobs and the personal income associated with those jobs through Goodwill's job placement programs due to data limitation on which industries these individuals were placed in to estimate wage-specific estimates.

⁴³ Supra, see footnote 15.

⁴⁴ Note: The "statewide impacts" data and "totals" presented in Table 9 considers statewide economies including trades, sales tax, and other economic factors and is not a total of each of the territory's values. Therefore, the "totals" row is not a sum of each territory's values, but it is instead an entirely different calculation for the entire state instead of a county-by-county addition of all economic and fiscal outputs from each territory. Calculating the statewide impacts this way helps avoid duplication in trade data between territories.

RETURN ON INVESTMENT

Return on investment (ROI) is a measure of an investment's profitability (return) relative to the cost of the investment. A traditional ROI is calculated by dividing the benefit (return) by the cost of the investment, with the ROI expressed as a ratio or percentage. A traditional ROI calculates the return on an initial investment made by a specific entity to an organization. This model is used for a traditional business, generally operating for profit.

As a non-profit organization, the ROI for Goodwill would not be correctly portrayed as just monetary value because of the diverse community impacts it has. Goodwill receives donations and contributions from people of the community it serves, and the return earned from Goodwill can be seen in both its economic impact to that community and its mission fulfillment. As Goodwill receives contributions and not investments, the impact shown in this report portrays Goodwill's non-profit ROI. A non-profit ROI is an analysis that focuses on the social value of a program, the progress towards fulfilling its mission, and the monetary impact of operations it has on the community.⁴⁵

CONCLUSIONS

Whether the shift in Florida's labor market stems from increasing remote work jobs, unemployment, retirement, or a lifestyle change, having a successful organization such as Goodwill that provides employment opportunities and community outreach is a significant benefit to help boost economic growth for a state. Goodwill is a classic example of the positive impacts that organizations can have at the community level that then rise to a higher state contribution level through job placements, increasing personal income, and producing a robust workforce. The approach that Goodwill uses to fund their programs through donations not only shows its savvy business model, but also its investment and dedication to provide public services to individuals in need. This approach has not only produced impressive results for the workforce but has also improved local economies, which directly improves the statewide economy as well.

One thing is clear—Goodwill provides significant job opportunities, economic development, and community support for thousands of Floridians each year. Goodwill has a unique and effective business model that provides tangible benefits to local communities and to the state of Florida. Goodwill not only provides training programs for individuals seeking career advice and changes, but also prepares individuals to re-enter society after incarceration with targeted programs that are community-based.

The consistent investment in local communities that Goodwill provides is realized through the economic impacts it makes across the state. Goodwill's statewide economic impact reaches almost \$1.2 billion per year and provides dynamic employment opportunities and contributes a substantial amount to the state's total GDP production. These contributions not only help Florida's economy grow, but they contribute to a workforce that is more likely to stay within the state throughout their productive working lives because these investments are made at a local and community-based level.

⁴⁵ Darryl Evey, "Nonprofit ROI: How "Measuring the Good" Can Help Nonprofits Justify Investments," retrieved from <https://blueavocado.org/finance/nonprofit-roi/>, accessed on October 2, 2024.

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As an independent, nonpartisan, nonprofit taxpayer research institute and government watchdog, it is the mission of Florida TaxWatch to provide the taxpayers of Florida and public officials with high quality, independent research and analysis of issues related to state and local government taxation, expenditures, policies, and programs. Florida TaxWatch works to improve the productivity and accountability of Florida government. Its research recommends productivity enhancements and explains the statewide impact of fiscal and economic policies and practices on citizens and businesses.

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RESEARCH PROJECT TEAM

Jessica Cimijotti-Little	<i>Research Analyst</i> Lead Author
Jui Shah	<i>Research Economist</i> Lead Author
George Kantelis	<i>Director of Communications</i> Layout & Design

All Florida TaxWatch research is done under the direction of Dominic M. Calabro, President, CEO, Publisher & Editor.

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106 N. Bronough St
Tallahassee, FL 32301

o: 850.222.5052

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Contact Jeff Kottkamp at jkottkamp@floridataxwatch.org