



# 2017 Outcomes Report

Goodwill of Central and Coastal Virginia

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## **INTRODUCTION / METHODOLOGY**

Goodwill of Central and Coastal Virginia (GCCVA) utilizes program evaluation methods to determine the success of its Vocational Services programs in carrying out its mission to “Help people help themselves through the power of work.”

Goodwill makes this determination by establishing objectives in each program area and comparing actual performance (results/outcomes) with the target goal for each objective. Program objectives fall in four categories:

Effectiveness – measures extent to which desired program outcomes/results are achieved.

Efficiency – focuses on timeliness of services and the economical use of agency resources.

Services Accessibility – measures ease and promptness of entry into the agency’s programs/services.

Satisfaction – measures extent to which consumers’ needs/desires and stakeholder (e.g. referral source) expectations are fulfilled through the program experience.

Individual program results are tabulated quarterly with a summary report generated at the year-end.

Goodwill uses this information to manage and improve service delivery, and to provide evidence of service quality to prospective consumers, to funding or regulatory entities, and to the community at large.

### **Data Collection Tool**

GoodTrak software is the tool used to collect Mission Services data. Data is collected on all participants served in the Career Development and the Vocational Services programs. GoodTrak is a case management and tracking software that was developed by Goodwill Industries, Inc. GoodTrak is a web-based application that can be accessed from any computer.

## **DESCRIPTION OF SERVICES AND STRUCTURE**

Mission services are divided into two operating units: Career Development Services and Vocational Services. Career Development Services encompasses services delivered at our five Community Employment Centers and at the Partnership for Families Northside, a collaborative partnership in North Richmond. Good Choice, a financial literacy program, and Ex-offender Re-entry Programs are also part of Career Development Services. Services in this unit tend to be more generic and the target population is typically the general public.

In Vocational Services, staff members provide more intensive services and support in order to help persons served overcome significant obstacles, build work skills, obtain employment, retain employment, and achieve their highest degree of economic and personal independence. Programs in Vocational Services include the Transition to Independence and Employment Program (TIE), Work Adjustment Training (WAT), Supported Employment (Individual and Group Models), Extended Employment Services, and Prevocational Services.

Services are classified as Basic, Organizational or Job Placement Intensive. With the exception of Job Placement Intensive services, most Career Development Services are classified as Basic services while most of the services in Vocational Services are classified as Organizational or Job Placement Intensive. Definitions of the categories are as follows:

<b>Primary Category Definitions</b>	
<b>Basic Services</b>	These services are described as “soft touch” in nature. Typically, they include discrete support services available to the public (rather than more intensive career services) and are usually provided without case management from Goodwill. Store vouchers, durable medical equipment loan or donation, and service learning projects are examples of programs/services that may be included in this category.
<b>Job Placement Intensive Services</b>	Programs and services in this category have an expected outcome of job placement. Job development and direct job placement programs, as well as temporary services and the pre-placement phases of Supported Employment, may be categorized here. Usually, a Goodwill case manager or direct service worker is assigned to each individual participating in placement focused programs and services. These are programs where persons enrolled can be tracked into employment, competitive and assisted.
<b>Organizational Intensive Services</b>	In these programs and services a case manager or direct service worker is usually assigned to each participant and services may be delivered over an extended period of time. Maintenance and enhancement of skills or independent functioning level, or maintenance of employment may be the expected result of programs and services in this category.

# SATISFACTION SURVEYS

## Satisfaction of Stakeholders

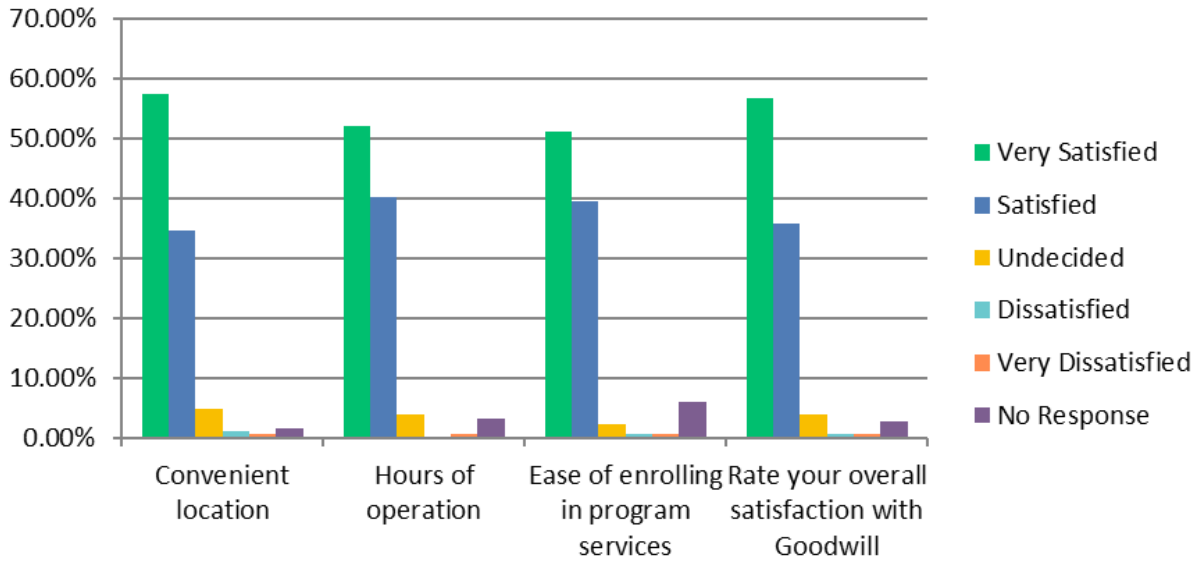
Stakeholders are individuals or groups who may have an interest in the activities, services and program outcomes of Goodwill of Central Virginia. Stakeholders include but are not limited to persons served, families, caregivers, board members, associates, employers, referral sources, funders, contributors and communities in our territory. For the purposes of this report, the focus will be the results from our satisfaction survey.

### 2016 Satisfaction Survey Methodology: Process, Results and Analysis

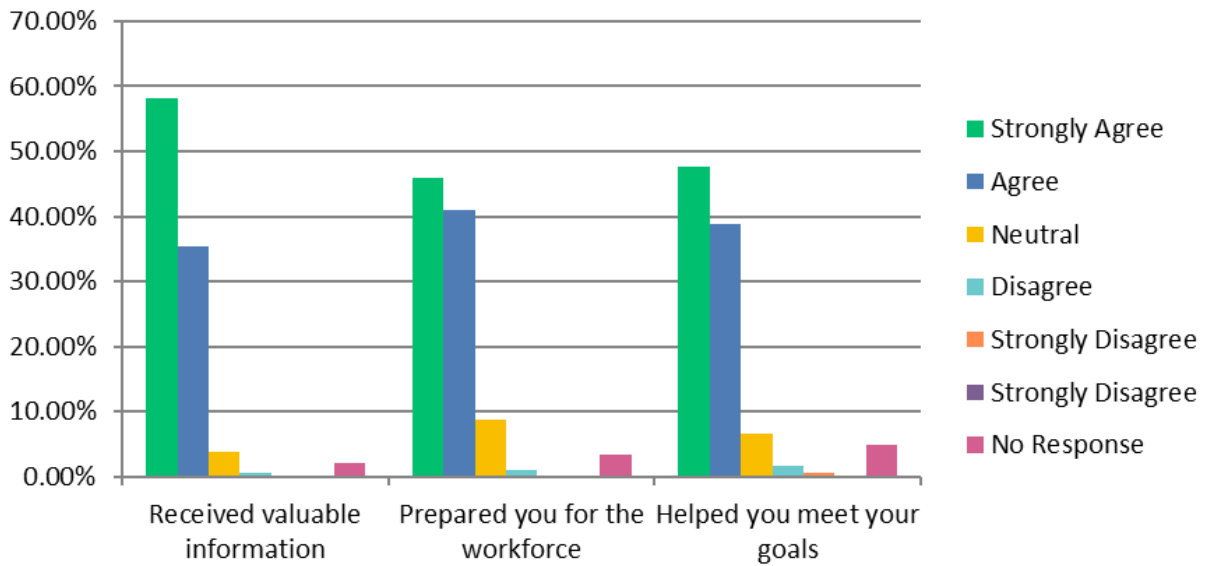
Persons served, family members, caregivers, referral sources and funders can provide input online or on a paper survey. Anyone can submit feedback at any time by using the form located on our website or by requesting a paper survey. The survey was developed with input from the Goodwills that are part of the Mid-Atlantic Goodwill Industries Coalition (MAGIC). MAGIC includes 16 Goodwills that operate in Maryland, North Carolina, South Carolina, Virginia, the District of Columbia, Kentucky and West Virginia. Satisfaction results are shared with program staff members, persons served and other stakeholders. This information is used to identify strengths, areas needing improvement, and suggestions that might enhance service delivery.

2017 Client Satisfaction Survey Results							
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	No Response	Total
Received Valuable Information	58.20%	35.45%	3.70%	0.53%	0%	2.12%	100.00%
	110	67	7	1	0	4	189
Prepared you for the Workforce	45.90%	40.98%	8.74%	1.09%	0%	3.29%	100.00%
	84	75	16	2	0	6	183
Helped you meet your Goals	47.54%	38.80%	6.56%	1.64%	0.55%	4.91%	100.00%
	87	71	12	3	1	9	183
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	No Response	Total
Treated me with respect	64.02%	30.69%	3.17%	0.53%	0.00%	1.59%	100.00%
	121	58	6	1	0	3	189
Easy to talk to	65.22%	29.35%	3.26%	0.54%	0.00%	1.63%	100.00%
	120	54	6	1	0	3	184
Easy to reach when I had a question	61.54%	34.62%	1.65%	0.55%	0.00%	1.65%	100.01%
	112	63	3	1	0	3	182
Helped guide me through the program	61.41%	30.98%	4.89%	0.54%	0.00%	2.18%	100.00%
	113	57	9	1	0	4	184
Considered my opinions when planning and delivering the services provided.	56.52%	35.87%	4.35%	1.63%	0.00%	1.63%	100.00%
	104	66	8	3	0	3	184
	Very Satisfied	Satisfied	Undecided	Dissatisfied	Very Dissatisfied	No Response	Total
Convenient Location	57.45%	34.57%	4.79%	1.06%	0.53%	1.60%	100.00%
	108	65	9	2	1	3	188
Hours of Operation	52.17%	40.22%	3.80%	0%	0.54%	3.27%	100.00%
	96	74	7	0	1	6	184
Ease of Enrolling in Program Services	51.10%	39.56%	2.20%	0.55%	0.55%	6.04%	100.00%
	93	72	4	1	1	11	182
Overall Satisfaction with Goodwill	56.76%	35.68%	3.78%	0.54%	0.54%	2.70%	100.00%
	105	66	7	1	1	5	185
	Very Likely	Likely	Neutral	Unlikely	Very Unlikely	No Response	Total
Likely to Recommend Goodwill to Others	60.53%	29.47%	3.68%	3.16%	0%	3.16%	100.00%
	115	56	7	6	0	6	190

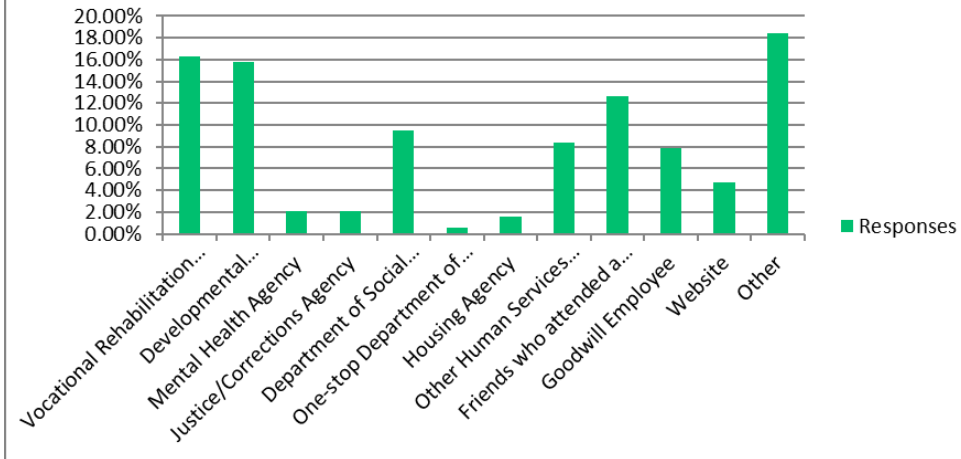
## Rate your level of satisfaction with utilizing Goodwill services:



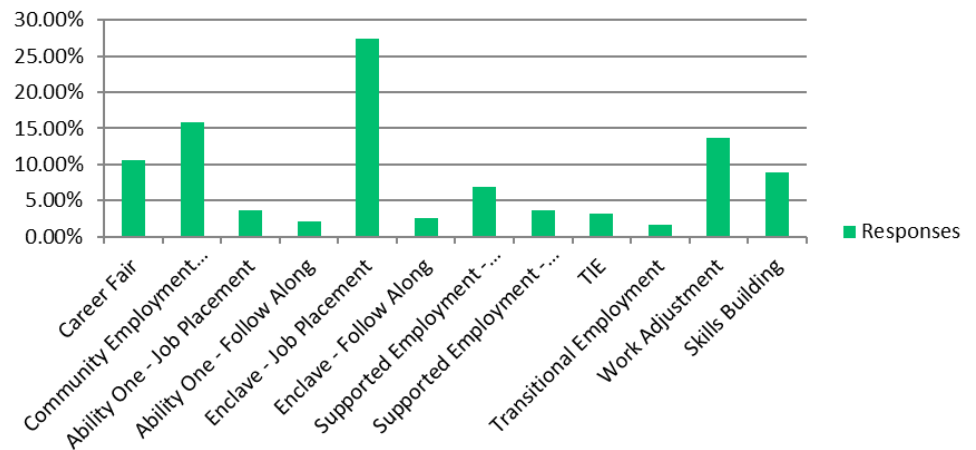
## How do you feel about the services you received with Goodwill?



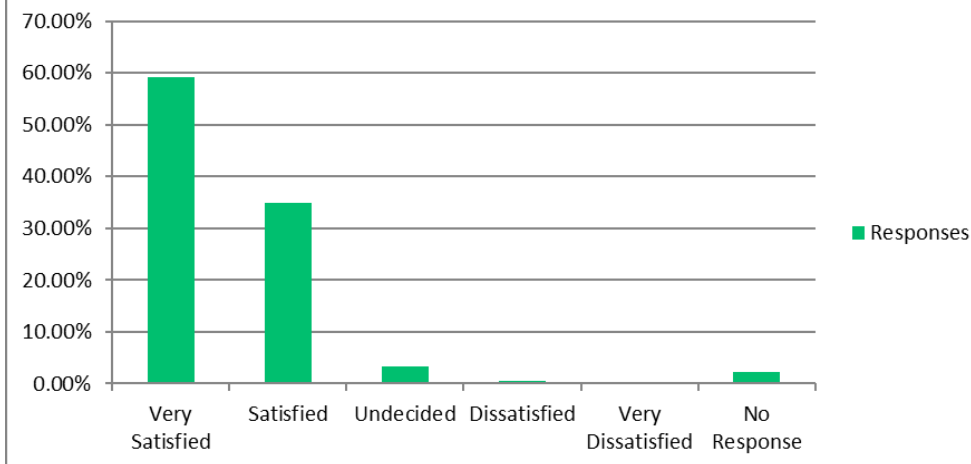
## How did you hear about Goodwill Services?



## Which Service/program did you receive from Goodwill, most recently completed?



## Rate your overall satisfaction with Goodwill staff:



# Outcomes by Program

Goodwill of Central and Coastal Virginia				
Ability One				
Program Evaluation 2017				
Rank	Categories of Measures	Data Source	Target	Outcome
	<b><u>Effectiveness</u></b>			
1	Maximize percent of participants who have worked 24 months or more placed in Supported/ Transitional or Placement	Case Manager Participant File	5%	58%
2	Maximize percent of participants employed 24 months or more	Case Manager Participant File	70%	72%
3	Maximize average hourly wages for participants	90/10 Forms & supporting data	\$8.50	\$14.15
	<b><u>Efficiency</u></b>			
4	Maximize average participant productivity	90/10 Forms & Supporting Data	75%	97%
5	Decrease the number of days between referral and service initiation	Case Manager Roll Book	5 days	0
7	Maximize the number of participants demonstrating positive work habits such as attending work daily	Case Manager Roll Book	85%	98%
	<b><u>Satisfaction</u></b>			
8	Increase satisfaction of participant	Participant Satisfaction Survey	80%	93%
	<b><u>Stakeholder Satisfaction</u></b>			
9	Increase satisfaction of referral sources/ stakeholders	Referral Source Stakeholder Survey	80%	91%
	Revised 3/2010			



**Goodwill of Central and Coastal Virginia  
Supported Services Program 05  
Program Evaluation 2017**

Rank	Categories of Measures	Obtained By	Target	Outcome
	<b><u>Effectiveness</u></b>			
1	Maximize the number of participants placed in competitive employment	Program Manager	3 per ES per quarter	3
2	Maximize percent of employed participants	Program Manager	75%	89.0%
3	Maximize the percent of participants placed in jobs accompanied with fringe benefits	Employment Specialist	60%	95%
4	Maximize wages of those employed in competitive employment	Program Manager	\$8.00	\$10.56
5	Maximize percent of participants who maintain employment for 24 weeks	Employment Specialist	75%	77.0%
	<b><u>Efficiency</u></b>			
6	Decrease number of Follow Along hours for those employed in competitive employment	Employment Specialist	15 Hours per quarter	8hr
	<b><u>Satisfaction</u></b>			
7	Increase satisfaction of participants	Record Coordinator	80%	92%
	<b><u>Stakeholder Satisfaction</u></b>			
8	Increase satisfaction of referral sources/stakeholders	Record Coordinator	80%	91%
	<b><u>Service Access</u></b>			
7	Decrease number of individuals waiting for service.	Employment Specialist	0	0.0
	Revised 3/2010			

**Goodwill of Central and Coastal Virginia  
Transitional Services Program 06  
Program Evaluation 2017**

Rank	Categories of Measures	Obtained By	Target	Outcome
	<b><u>Effectiveness</u></b>			
1	Increase the number of participants placed in competitive employment	Employment Specialist	2 Participants per quarter	0.5
2	Increase wages of those employed in competitive employment	Employment Specialist	\$9.00	\$8.25
3	Increase percent of participants who maintain employment for sixty days	Employment Specialist	90%	95%
	<b><u>Efficiency</u></b>			
4	Decrease the time from program entry to plan development	Employment Specialist	5 Days	0 days
	<b><u>Satisfaction</u></b>			
5	Increase satisfaction of completers (online survey conducted at exit)	Employment Specialist	85%	90%
	<b><u>Stakeholder Satisfaction</u></b>			
6	Increase satisfaction of referral sources/stakeholders	Employment Specialist	80%	91%
	<b><u>Service Access</u></b>			
7	Decrease number of individuals waiting for service.	Employment Specialist	0	0

Revised 3/2008

**Goodwill of Central and Coastal Virginia  
Supported Services Program - Enclave  
Program Evaluation 2017**

<b>Rank</b>	<b>Categories of Measures</b>	<b>Obtained By</b>	<b>Target</b>	<b>Outcome</b>
	<b><i>Effectiveness</i></b>			
1	Increase percent of participants referred to Support/Transitional or Placement	Case Manager	5%	0%
2	Increase average hourly wages for participants under special wage certificate	Case Manager	\$7.25	NA
3	Percentage of those participants who meet at least one objective annually	Case Manager	70%	85%
4	Increase percent of participants who maintain employment for 24 weeks	Case Manager	80%	92%
	<b><i>Efficiency</i></b>			
5	Maximize the percent of participants demonstr	Case Manager	90%	98%
6	Increase average participant productivity	Case Manager	65%	95%
7	Decrease length of time from intake to enclave placement	Case Manager	30 days	0
	<b><i>Satisfaction</i></b>			
8	Increase satisfaction of participants	Case Manager	85%	97%
	<b><i>Stakeholder Satisfaction</i></b>			
9	Increase satisfaction of referral sources/stakeholders	Case Manager	80%	91%
	<b><i>Service Access</i></b>			
10	Decrease number of individuals on waiting list	Case Manager	5	0
	Revised 3/2010			

**Goodwill of Central and Coastal Virginia  
Situational Assessment Program 01  
Program Evaluation 2017**

Rank	Categories of Measures	Obtained By	Goal	Outcome
	<b><u>Effectiveness</u></b>			
1	Maximize the number of participants who identify a vocational goal	Case Manager/ES	90%	100%
2	Maximize the percentage of completers	Case Manager/ES	90%	75%
3	Maximize the percent of completers referred to transitional and supported employment	Case Manager/ES	90%	75%
	<b><u>Efficiency</u></b>			
4	Decrease time from referral to intake	Case Manager/ES	10 Days	<10 days
	<b><u>Satisfaction</u></b>			
5	Maximize the satisfaction of completers (online survey conducted at exit)	Record Coordinator	85%	95%
	<b><u>Stakeholder Satisfaction</u></b>			
6	Increase satisfaction of referral sources/ stakeholders	Record Coordinator	80%	91%
	<b><u>Service Access</u></b>			
7	Decrease number of individuals waiting for service.	Case Manager/ES	0	0
	Revised 3/2010			

Goodwill of Central and Coastal Virginia Work Adjustment Training Program 02 Program Evaluation 2017				
Rank	Categories of Measures	Obtained By	Target	Outcome
	<b><u>Effectiveness</u></b>			
1	Maximize percent of completers referred to Placement or Supported/Transitional Services	Case Manager	35%	96%
2	Maximize percent of completer identifying a feasible job goal	Case Manager	85%	82%
3	Maximize percent of participants employed at 60 day follow-up	Case Manager	35%	56%
5	Maximize percent of successful completers	Case Manager	80%	92%
	<b><u>Efficiency</u></b>			
6	Average length of time participants in WAT	Case Manager	30 days	30 days
7	Increase percent of participants who attend program daily	Case Manager	85%	96%
	<b><u>Satisfaction</u></b>			
8	Increase satisfaction of completers (online survey conducted at exit)	Record Coordinator	85%	97%
	<b><u>Stakeholder Satisfaction</u></b>			
9	Increase satisfaction of referral sources/ stakeholders	Case Manager	85%	91%
	<b><u>Service Access</u></b>			
10	Decrease percentage of individuals on waiting list	Case Manager	10%	0
11	Decrease time from intake to start of program	Case Manager	5 Days	3 days
	Revised 1/2014			

# VOCATIONAL SERVICES PROGRAM OUTCOME RESULTS

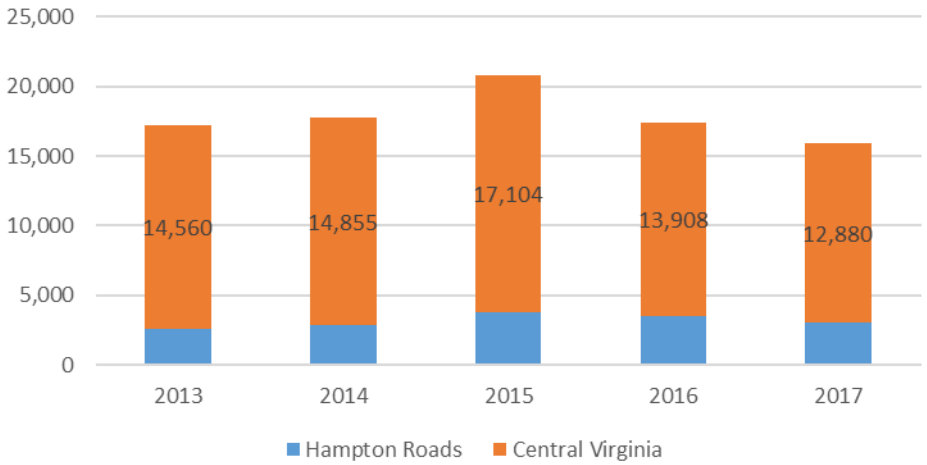
## Placements

- Placed 2,031 individuals into employment (-12%)
  - Hampton Roads placed 349 individuals (-13%)
  - Central Virginia placed 1,689 (-12%)
- 302 of the 2,040 were ex-offenders (-14%)
- 45 of the 2,040 were severely disabled (-18%)
- 112 of the 2,040 participated in the TIE program (11%)  
(Transition to Independence and Employment)
- 80 of the 2,040 were Veterans (-22%)
- 55 Youth (ages 16-20) Placed (-66%)

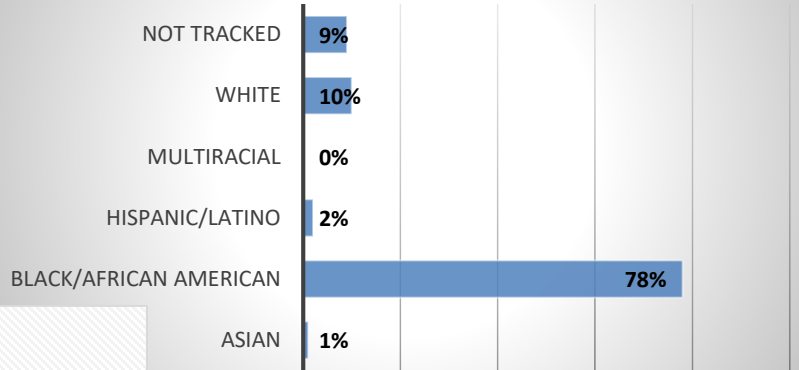
## Enrollments

- New Enrollments 8,435 (-41%)
  - 81% of the enrollments were in Central Virginia (1%)
  - 19% of the enrollments were in Hampton Roads (-1%)
- 1,070 Ex-offenders enrolled in Community Employment Centers (-35%)
- 575 Severely disabled persons served through Vocational Services (-3%)
- 239 Severely disabled persons enrolled in Vocational Services (-6%)
- 285 Individuals enrolled in the TIE Program (-32%)
- 396 Veterans enrolled in the Community Employment Centers (-4%)
- 439 Youth (ages 16-20) enrolled in programs (191%)

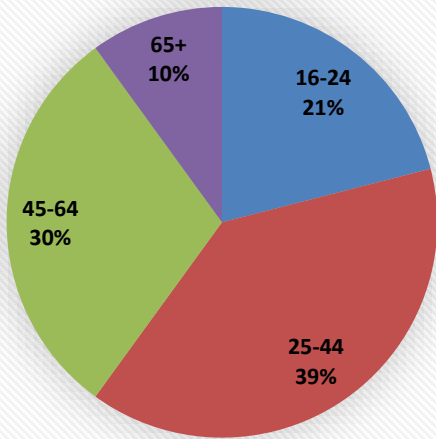
## People Served by Location



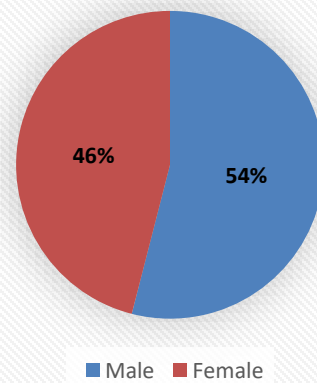
## Ethnicity



## Age Group

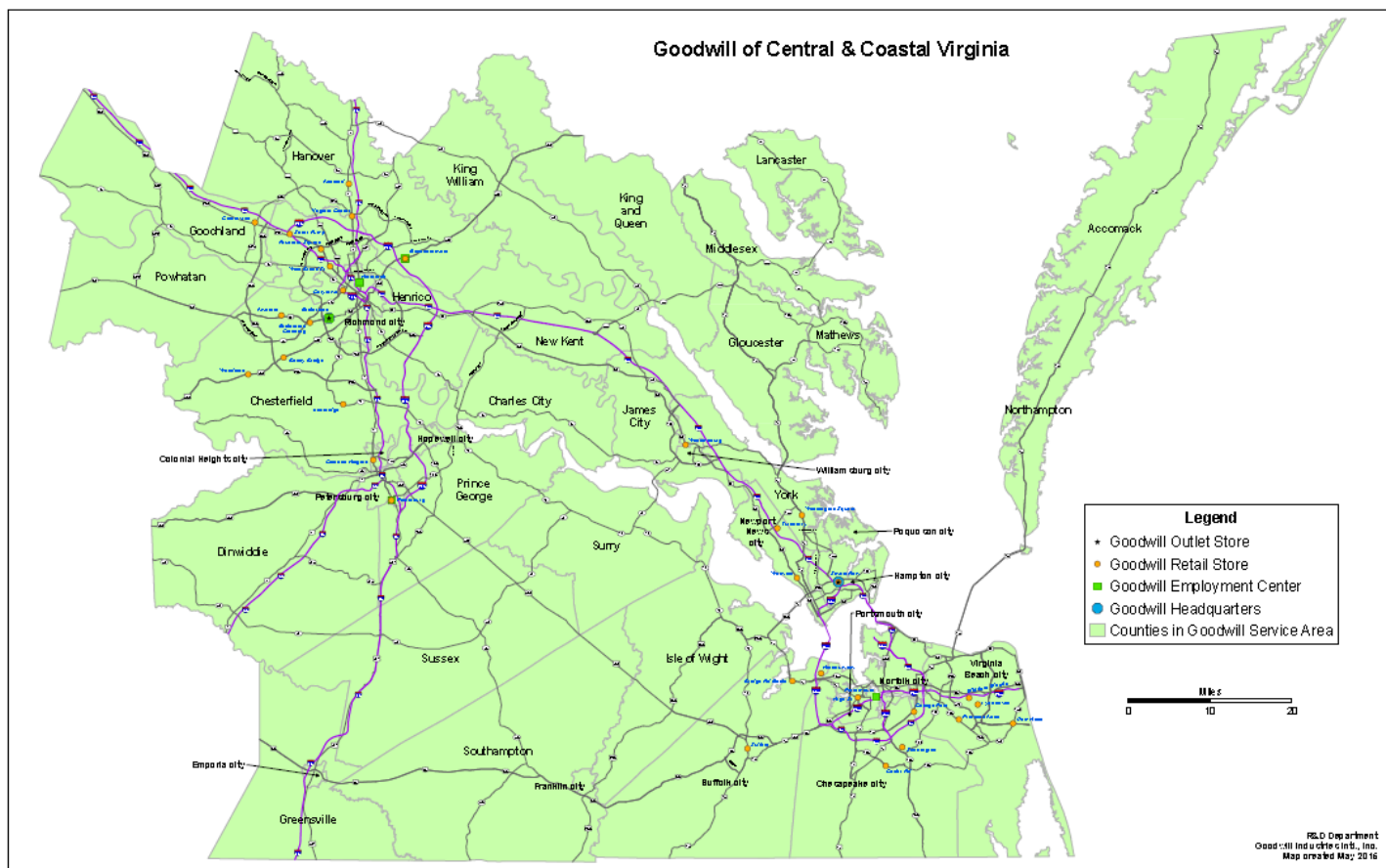


## Gender



# Territory

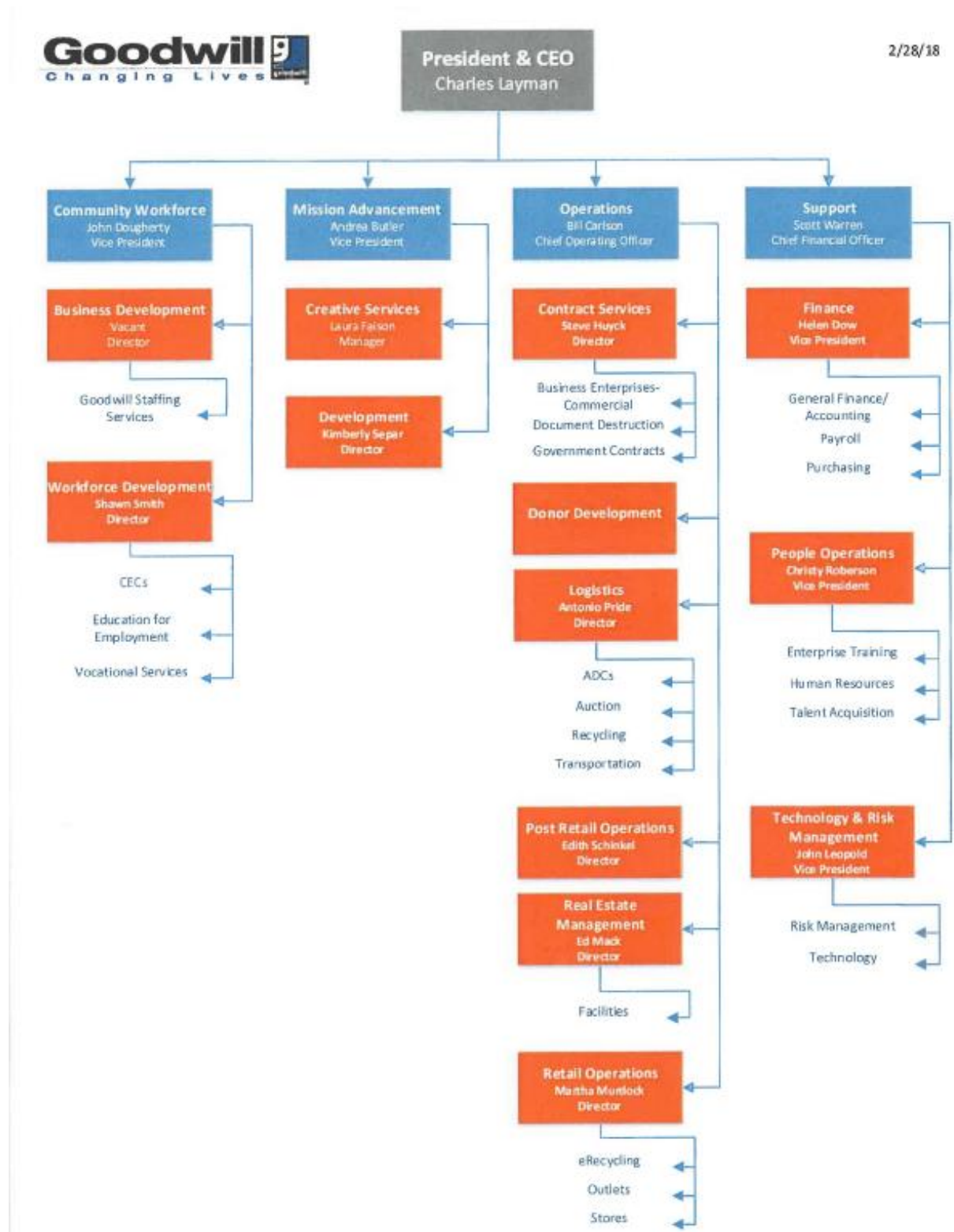
Central Virginia Area	Peninsula Area	Hampton Roads Area	South Hampton Roads Area (Sub-category of HR Area)
<b><u>CITIES</u></b> Hopewell Petersburg Richmond City Colonial Heights Emporia	<b><u>CITIES</u></b> Hampton Newport News Poquoson Williamsburg	<b><u>CITIES</u></b> Chesapeake Emporia Franklin Norfolk Portsmouth Suffolk Virginia Beach	<b><u>CITIES</u></b> Chesapeake Norfolk Portsmouth Suffolk Virginia Beach
<b><u>COUNTIES</u></b> Charles City Chesterfield Dinwiddie Goochland Hanover Henrico King & Queen New Kent King William Powhatan Prince George	<b><u>COUNTIES</u></b> Gloucester James City Lancaster Mathews Middlesex York County	<b><u>COUNTIES</u></b> Accomack Greensville Isle of Wight Northampton Southampton Surry Sussex	<b><u>COUNTIES</u></b> Isle of Wight Surry





# ORGANIZATIONAL CHART

Goodwill of Central and Coastal Virginia reorganized mid-year 2016 to better serve our clients. 2017 was spent implementing those changes and some of those transitions can be seen in the Organization Chart below.



# **STRATEGIC PLAN**

## **2018 -2020 Strategic Plan Executive Summary**

Goodwill of Central and Coastal Virginia’s strategic plan for 2018 through 2020 is focused on the successful execution of our organizational transformation to increase mission impact. As directed by our Board of Directors, GCCVA began assessing and determining the necessary steps to achieve greater awareness of our organization’s mission and impact on individuals, families and communities. The plan serves as the roadmap for implementation of key strategies that will build on our organization’s existing strengths while pursuing new opportunities for our Goodwill to thrive.

GCCVA’s objective is to continue to be a leader within the Goodwill network and across our region in both mission impact and financial health. We will leverage our core competencies in retail, contract services and job readiness training while also diversifying revenue through new business opportunities and expanding philanthropic support.

Through this strategic plan we reaffirmed our focus on serving individuals facing challenges to work. The planning process yielded five strategic pivots to guide GCCVA to:

- Achieve greater impact
- Diversify revenue streams
- Enhance data collection to inform decisions
- Align with market demands for employment
- Values-Based Leadership in Action

The plan calls for measured growth in revenue across all business lines. This growth is based on steady performance at existing stores and the addition of new stores, increased fee-for-service revenue through expanded business contracts, and increased philanthropic support from across our territory.

Under the plan, continued investment in infrastructure and capacity building will support our growth and mission advancement. This investment will include people, technology and facilities as well as an on-going commitment to sustain our “people first” priorities through embracing and engaging a values-based culture across the organization.

## Heritage, Purpose, Mission, End Statements, Values

<b>Heritage</b>	"Friends of Goodwill, be dissatisfied with your work until every handicapped [sic] and unfortunate person in your community has an opportunity to develop to his fullest usefulness and enjoy a maximum of abundant living." — Dr. Edgar J. Helms, Founder of Goodwill (1941)
<b>Purpose</b>	We believe that work is a foundation for empowering individuals, strengthening families, and building prosperous communities.
<b>Mission</b>	To create pathways to opportunities and success for job seekers facing challenges to work.
<b>Mission Tagline</b>	Creating Pathways to Work – With You
<b>End Statements</b>	<ul style="list-style-type: none"> <li>• Goodwill provides workforce solutions, creating individual pathways to work and meeting employer needs, through donations and sales of used goods, business solutions, philanthropic contributions and community partners.</li> <li>• Goodwill helps individuals overcome challenges to obtain work while helping employers meet their workforce needs. We fund a wide array of services through donations and sales of used goods, contract services and philanthropic contributions.</li> </ul>
<b>Values</b>	<p><b>Innovation</b> We exercise the power to make improvements.</p> <p><b>Respect</b> We value and connect with others.</p> <p><b>Integrity</b> We earn trust through all of our actions.</p> <p><b>Learning</b> We grow and succeed through learning.</p> <p><b>Teamwork</b> We achieve goals and deliver our mission together.</p> <p><b>Commitment</b> We demonstrate our value to and impact on the organization.</p>

2018-2020 GII Common-Ground Aspirations and Success Indicators	
<b>Advance Mission</b>	<ul style="list-style-type: none"> <li>▪ Enhance mission impact at the individual and organizational level.</li> <li>▪ Develop metrics for pilot and evaluate mission impact.</li> <li>▪ Communicate mission impact.</li> </ul>
<b>Build Business</b>	<ul style="list-style-type: none"> <li>▪ Increase organizational revenue and margin available for mission.</li> <li>▪ Demonstrate Goodwill mission (including employee development, pay and benefits) through business operations.</li> <li>▪ Communicate impact of Goodwill on environmental sustainability</li> </ul>
<b>Strengthen Brand</b>	<ul style="list-style-type: none"> <li>▪ Enhance brand perception through mission and business operations, partnerships and brand messaging alignment.</li> <li>▪ Integrate mission messaging into infrastructure and initiatives to communicate how social enterprise advances mission.</li> <li>▪ Comply with membership requirements</li> </ul>

## Guiding Principles

### Cultivate a Culture of Associates First

We will continue to foster an “Associate First” culture through all levels of the

organization: we will emphasize the responsibility of each Associate to serve as a Goodwill ambassador and we will work to fulfill our vision through our Associates’

work. Our culture will become one of values-based leadership where we will coach, counsel and then get out of the way.

### **Work as an Integrated Team**

Our Goodwill does not operate in a vacuum. We depend on numerous stakeholders to achieve our mission. We recognize and embrace the organization's interdependencies. We will continue to work cooperatively to ensure that all are included in a coordinated and unified manner.

### **Build Trust through Collaboration and Partnerships**

We do not carry out our mission alone, and we can succeed only with the help of all levels of service agencies, the private sector, academia, and the communities we serve. We will be a trustworthy partner in helping people help themselves through the power of work. Through education, outreach and relationship building, we will foster expertise across multiple disciplines to serve as an indispensable resource for our communities. We will give those we serve the tools they need to reach their fullest potential.

### **Be Flexible**

Our mission will focus on meeting diverse needs in a changing world. Our strategies will be flexible. We will be creative and nimble in achieving our mission. We will be proactive in planning and responsive in implementation. We will anticipate future opportunities; not simply react to current situations. We will lean into uncomfortable situations.

### **Apply Risk Management Discipline**

We will identify key external factors to the agency that could significantly affect the achievement of our strategic goals and hinder mission delivery. Our Goodwill is

complex and resources are constrained. We will use qualitative and quantitative risk assessments to make informed resource decisions.

### **Ensure Accountability**

Achieving our goals requires accountability of all associates. We will represent our organization by making decisions that are driven by adherence to our core values. We are accountable to our associates, our clients, and our customers for stewardship of our finances, company assets, and community well-being.

### **Capitalize on Emerging and Optimize Existing Technologies**

Innovations in technology will enhance our ability to successfully execute our mission. In addressing all our objectives, we will use process improvement, return on investment and technology to enhance our efficiency, with a view of overall positive impact to our organization. We will incorporate identifiable process improvements in each Department's Annual Operating Plan, when applicable.

### **A Mindset of Continuous Improvement**

We will foster a climate of continuous improvement in all we do, constantly seeking better, more cost efficient and effective ways to support our mission and develop our people. Keeping our core values at the forefront, we will consider all resources: financial, systems, and people-when looking at continuous improvement.

## Objective 1 - Associates & Volunteers

Attract, inspire and develop our people to achieve successful outcomes in support of our mission.

Performance Measures		
Measure	2016 Actual	2016 Target
1.1 Managing: <ul style="list-style-type: none"> <li>a. Turnover</li> <li>b. Retention Rate</li> </ul> * <i>MAGIC is the acronym for the Mid-Atlantic Goodwill Industries Coalition.</i>	42.0% 76.5%	≤48.0% ≥71.0%
1.2 Building Professional Competence <ul style="list-style-type: none"> <li>a. # of Internal Promotions (# of Position Requisition Forms)</li> <li>b. Average # of Learning Hours (50% in “Development” type learning)</li> <li>c. Learning \$ as % of Payroll \$</li> <li>d. Leaders’ scores on Leadership Survey</li> </ul>	6.0% 29.9 Exempt 7.8 Non Ex Establish 2014 as Baseline Establish 2014 as Baseline	15.0% 29 Exempt 15 Non Ex TBD TBD
1.3 Associate Satisfaction (survey results captured every other year, next is 2017)	N/A	80.0%
1.4 External Volunteers <ul style="list-style-type: none"> <li>a. # of hours</li> <li>b. # of volunteers</li> </ul>	Establish 2014 as Baseline	TBD
1.5 Board of Directors engagement (not including Advisory Members) <ul style="list-style-type: none"> <li>a. 100% completion of surveys (note: last survey in 2012)</li> <li>b. Attendance (Board meetings)</li> <li>c. Contributions (% of Board participation)</li> </ul>	53.0% 68.0% 100%	100% TBD 100%

## Objective 2 - Community Impact

Increase customer engagement through mutual understanding of the Goodwill mission (public awareness).

Performance Measures			
Measure		2016 Actual	2016 Target
2.1	Donations per household	1.14	1.15
2.2	Revenue per household	\$39.45	\$44.40
2.3	Net contribution per household	\$10.73	\$14.06
2.4	People Served (includes 1911 & Brooks Crossing)	17,386	25,000
	Career Development Services	16,391	23,100
	Vocational Rehab Services	1,005	1,350
	Goodwill Staffing Solutions	360	550
2.5	Job Placements (annually)	2,318	3,500
	a. Average Wages	\$10.75	TBD
	b. Credentials	Establish 2014 as Baseline	+ 25% over Baseline
2.6	Job Creation (cumulative # of jobs created throughout our organization)	WFD 40 DGP 70	WFD 150 DGP 260

## Objective 3 – Financial Accountability

Optimize financial performance in order to maximize mission delivery.

<b>Performance Measures (\$ in millions)</b>		
<b>Measure</b>	<b>2016 Actual</b>	<b>2016 Target</b>
3.1 Increase revenue	\$46.01	\$56.8
a. Donated Goods Program	\$17.82	\$13.0
b. Govt. Contracts	\$0.21	\$0.650
c. Commercial Services	\$3.23	\$2.6
d. Vocational Services	\$1.29	\$2.6
e. Staffing Services (temp agency)		
3.2 Increase Net Contribution	\$12.52	\$15.9
a. Donated Goods	\$1.73	\$1.5
b. Govt. Contracts	\$0.04	\$0.065
c. Commercial Services	\$1.84	\$0.455
d. Vocational Services	\$-0.18	\$0.026
e. Staffing Services	\$4.09	\$5.3
f. Organization Net Income		
3.3 Fund Raising Revenue		
a. Annual Fund Campaign Up 24% From Target	\$815	\$600
b. Capital Campaign	\$2.3M	\$3.5M
c. Program Grants Down 13% from 2015	\$467K	TBD
d. Average Round Up donation (at the register)	\$.60	\$.585
3.4 Financial Ratio		
a. Debt/EBITDAR (earnings before interest, taxes, depreciation, amortization & rent)	3.81	<4.5
b. Liquidity	3.5 months	3 months

#### **Objective 4 - Operational Excellence**

Increase efficiencies, reduce risk and enhance infrastructure to support growth of the mission.

<b>Performance Measures</b>		
<b>Measure</b>	<b>2016 Actual</b>	<b>2016 Target</b>
4.1 Maintain percentage of indirect costs as % of total revenue	11.5%	12.0%
4.2 Increase mission integration throughout the organization # of Associates with documented disabilities (balanced scorecard measurements)– Note: hires through TA will rely upon self-disclosure.)	WFD 127 DGP 54 Support 1	WFD 170 DGP 80 Support 10
4.3 Individuals placed in jobs of those who complete their plan	62.0%	65.0%
4.4 Donated Goods Program ER (“expense to revenue”)	72.8%	72.0%
4.5 Government Contracts ER	90.3%	89.0%
4.6 Commercial Services ER	79.7%	89.0%
4.7 Retail revenue as % of total Donated Goods (includes Outlet)	89.3%	83.0%
4.8 Risk Management		
a. Workers’ Compensation # of Claims:		
i. Lost Time	5	< 14
ii. Medical Only	91	< 110
b. General Liability # of Claims	44	< 26

\*Based on 2016 Unaudited results wo Adjustments

\*\*Net Contrib & Whole Org results include Investment income



**Appendix A: Mission Strategy Chart**

## **Appendix B: Strategic Context and Stakeholder Outreach**

### ***Strategic Context***

Our *Strategic Planning* process considers a multitude of internal and external forces likely to shape current and future challenges to our Goodwill. The *Plan* also considers how these forces may affect our role in the communities we serve. Our Board conducts quarterly Town Hall Meetings to independently assess community needs and how those needs might be met through our strategic mission.

Out of the community needs assessment, themes are developed that will affect our future decision-making. The themes are consistent with current action plans and issues related to our mission. These themes are:

- Equilibrium within our Territory.
- Putting our Associates first and being a learning & training organization.
- Growth in our Donated Goods market share while delivering our mission through the Donated Goods Program.
- The Workforce Development group expanding core services (through collaboration) and use of development dollars as seed capital for new concepts.
- Development drawing upon a “rendering” of where we want to be in 5 years and how that will translate into external funding to support this vision.
- Support groups aligned with the business units and infrastructure to adequately facilitate growth.

The Executive Team uses these themes to shape the (which year?) *Strategic Plan*. (We actually included the entire Ops Mgt. team in 2016)

### ***Stakeholder Outreach***

We rely on our many stakeholders to help form our strategic mission. With so many stakeholders in the private and public sectors, it is essential for us to solicit external input for the development of this *Plan*.

To gain the broadest possible feedback, our Board conducts the previously mentioned quarterly Town Hall Meetings to solicit input from a wide variety of governmental, non-profit, and private organizations. It is anticipated that subject matter experts from all constituencies will participate actively in a truly collaborative process; as a result, we hope to be able to integrate key elements from their input into our regular strategic planning process.

**Appendix C: Linking Strategy to Performance**

We are committed to linking our strategy to operational performance through accountability and an emphasis on outcomes and reporting results.

Figure 1 presents this performance management framework along with a definition of terms:

Figure 1



<b>Mission</b>	Describes at the highest level what our Goodwill aims to achieve.
<b>Goal</b>	A goal is a statement of aim or purpose included in our Goodwill’s <i>Strategic Plan</i> . In the <i>Plan</i> , goals are the overarching structure used to group multiple objectives and their associated program performance goals. In their aggregate, program performance goals and objectives influence achievement of goals.
<b>Performance Objective</b>	An objective is an outcome-oriented statement in the <i>Strategic Plan</i> that describes a targeted area of action to support achievement of the goals.
<b>Performance Measures</b>	This is an indicator, statistic, or metric used to gauge program performance and assess progress in meeting the program performance goal, and in turn, the objectives and goals of our Goodwill.
<b>Program</b>	A program is a group of activities acting together to accomplish a specific high-level outcome external to our Goodwill. Programs provide the operational processes, skills, technology,

	the human capital, and other resources to achieve program performance goals.
<b>Operating Plans &amp; Budget</b>	Operating plans are Departmental tactical plans that outline operational steps to execute the strategic objectives. The budget is an allocation of limited funds to enable execution of the operating plans.
<b>Performance Result</b>	A result is the actual level of performance for each performance measure achieved during a fiscal year. Results are compared to targets to determine how well actual performance measured up to that which was planned.

**Supplement 1: Planning, Budgeting, and Operating Plan Process**

We use an *Operating Plan, Budgeting, and Measurements* process to determine priorities and allocate resources. In the *Operating Plans*, the Management Team determines how resources are allocated to best meet the prioritized needs within projected resource constraints. In *Budgeting*, detailed budget estimates are developed ensuring the most efficient use of limited funding and that priorities are being met as effectively as possible. Finally, in *Measurements*, program execution and output are assessed against planned performance and strategic progression to determine the best return on investment.

The Executive Team is responsible for the development and alignment of the organization’s long-term objectives. Overarching guidance is provided by the Board of Directors to set mission strategy, which is the foundation for our *Strategic Plan*. Operating Plans and the budget are developed by the Management Team.

**Supplement 2: Execution Cycle**

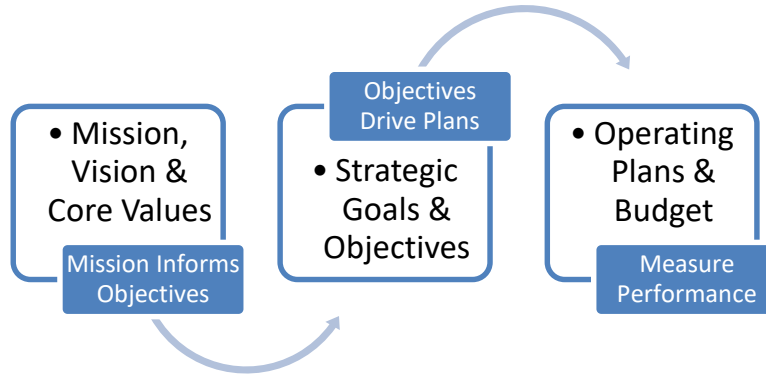
*Strategic Plan Development*

The Executive Team provides a central focus for the formulation of long-range and strategic objectives to achieve our mission. We use a strategic planning process that considers the

competitive environment, workforce development trends, funding sources, referring agencies, economic environment, and analysis of the current and future challenges facing workforce development and the strategic vision for its future. The *Strategic Plan* addresses the present needs of our Goodwill, as well as those that may arise over the next 3 - 5 years.

Figure 2 illustrates the process flow for strategic plan development that is discussed below.

Figure 2



In support of the development of the *Strategic Plan*, the Board and Executive Team participated in a Strengths, Weaknesses, Opportunities, Threats and Vision (SWOTV) survey. In conjunction with this analysis, the Donated Goods Program and Workforce Development Program business units conducted an assessment of the challenges and strategic issues in their respective business lines. Through analysis of the challenges, plans, opportunities, and executive level priorities, the Executive Team developed an initial outline of strategic objectives. Working groups, consisting of representatives from across the Management Team developed a more detailed plan. The Management Team reviewed goals and objectives that reflect the desired state of our Goodwill in the next 5 years. They endorsed four core goals and objectives that we aim to accomplish.

These strategic goals and objectives provide overarching guidance for executing our mission. Well-defined desired performance measures will provide the means to assess whether the strategic goals and objectives are being met. Reporting Performance Results compared to Performance Measures will enable overall organizational assessment of our Goodwill's efforts towards its desired mission accomplishments.

# VOCATIONAL SERVICES – Situational Assessment (SA)

*Report prepared by: Stephanie Porter-Lopez, Operations Manager*

## I. OVERVIEW

Situational Assessment services fall under the Supported Employment program, and involve an on-site evaluation designed to assess job skills, physical and emotional tolerance for various types of jobs, and interpersonal skills in the work environment. Persons who may benefit from these services include:

- Those who express an interest in training or employment, but lack an understanding of the required abilities and/or physical demands.
- Those who have never worked or have not worked within the last 3-5 years.
- Those who are unsure regarding vocational decisions.
- Those who need more information regarding their physical ability to perform designated jobs.

The assessments are conducted at a community employment site, and the schedule for when they take place is flexible and depends on both the client's and the employer's schedules. The Employment Specialist will coordinate the schedule to accommodate a favorable Situational Assessment opportunity, whether a weekday/weekend or in the daytime/evening.

## II. PRIMARY FUNDING SOURCE

- Department of Aging and Rehabilitative Services (DARS)

## III. SERVICES

In Situational Assessment services, an Employment Specialist searches for competitive work/task opportunities in the community for the customer after determining his/her preferences for employment locations, as well as the specific type and level of supports necessary. During and after each individual assessment, the Employment Specialist assesses the following:

- Individual's ability to function in an on-site job training program, possibly leading to Supported Employment.
- The need for on-going support services in order to perform competitive work.
- The ability to work in an integrated employment setting at the time of placement.
- Upon completion of a predetermined number of assessments, a determination is made as to whether Supported Employment is the appropriate next step.

#### IV. EXTENUATING AND INFLUENCING FACTORS

DARS funding priorities in 2017 resulted in the decreased number of referrals for Situational Assessment services. The focus on placement services remained a priority, as careful prioritization of funding by DARS month to month continued. Situational Assessment referrals were granted for scheduled ‘working interviews’ as part of the protocol for hiring at some community employment sites.

A significant amount of time is focused mainly on developing relationships with community employers who are willing to provide assessment opportunities to the customers enrolled. Continued success in this program depends on the networking efforts with community businesses initiated by the Vocational Services and Business Development teams.

#### V. 2017 PROGRAM HIGHLIGHTS

- 14 new customers served in 2017, 3 in Central Virginia and 11 in Hampton Roads.
- Of the 14 participants served in Situational Assessment in 2017, all were referred/recommended for Supported Employment programs operated by Goodwill.
- Of the participants who were referred/recommended for SE/JCTS in Hampton Roads, 4 were placed into competitive employment.

#### VI. ANALYSIS OF TRENDS

SA remains an effective assessment tool to gauge needed supports for success on the job. The assessment and intensive level of supports provided to those who participated proved to be effective in determining readiness for competitive employment as evidenced by those who were referred for SA services successfully completed the program, some were recommended for and obtained employment.

#### VII. RECOMMENDATIONS AND OPPORTUNITIES FOR 2018

- Continued development of integrated community business resources as venues for Situational Assessments and increased advocacy for permanent placements after completion of assessments, if relevant.
- Diversify internal assessment opportunities within Goodwill beyond retail and janitorial (i.e. explore possibilities for assessments in clerical, secretarial, receptionist, etc.).
- Continued utilization of Situational Assessments as part of the interview/hire process at Commissary AbilityOne sites.

#### SITUATIONAL ASSESSMENT DEMOGRAPHICS

*\*Client demographics are included as part of the Supported Employment demographics.*

# VOCATIONAL SERVICES – Work Adjustment Training (WAT)

Report prepared by: *Stephanie Porter-Lopez, Operations Manager*

## I. OVERVIEW

The Work Adjustment Training Program (WAT) provides a 1 to 3 month training program designed for individuals who have difficulty obtaining or maintaining employment due to a lack of recent experience or any work experience at all. This program works to assist in developing realistic vocational goals, while teaching basic work skills needed to enter any occupation or skills training program. Emphasis is placed on building physical stamina, emotional tolerance, and overall work behavior associated with entering/re-entering competitive employment or a supportive work environment.

## II. PRIMARY FUNDING SOURCE

- Department of Aging and Rehabilitative Services (DARS)
- Community Services Board agencies (i.e. Richmond Behavioral Health Authority)
- Private Pay funding sources – i.e. family, private insurance, etc.
- Worker’s Compensation via Department of Labor

## III. SERVICES

Skills that are developed and topics that are addressed during the program include, but are not limited to, the following:

- Work habits (attendance, punctuality, respecting supervisors, calling supervisors when late or absent, ability to abide by rules/regulations).
- Interpersonal relationships with supervisors and coworkers.
- Develop work-related communication.
- Production quality and quantity of work.
- Physical and emotional tolerance for work.
- Potential for developing vocational skills.
- Decision making and judgment skills.
- Work related community skills – time/money mgmt.
- Development of realistic vocational goals.
- Attitude, motivation, and flexibility.
- Personal grooming, hygiene, and appearance.
- Exploration of vocational interests.
- Provide a positive training experience.

## IV. EXTENUATING AND INFLUENCING FACTORS

In 2017, the demand for services in Hampton Roads localities continued to see an increase and efforts continued to focus on maximizing WAT service delivery while still managing efficiency with expenditures. In response to the demand for services, program operation at 3 of 6 locations offered full-time programs (AM and PM sessions) maximizing capacity for most of 2017. In CVA, WAT services did not see a similar increase in demand for services, however, was able to maintain the current partnership with DARS and DBVI to offer services as the need was presented.



V. 2017 PROGRAM HIGHLIGHTS

- As a result of continued demand for WAT program services in Hampton, Newport News and Portsmouth, the influx of clients continued to be added to the wait list, full-time service (AM and PM slots).
- 158 new participants served in WAT programs in 2017, an increase of 10% from 2016

VI. ANALYSIS OF TRENDS

During 2017, the Work Adjustment Training program continued to experience increased enrollment in Hampton Roads territories. This was not experienced with the WAT Program in Richmond. However, where business needs were presented, the demand was met. The increase of referrals in some Hampton Roads localities was consistent during the first 3 quarters of 2017. Order of Selection put in place in fall of 2017 had minimal impact on WAT referrals in Hampton Roads throughout the remainder of the year. These priorities experience a shift month to month dependent upon the locality of services.

VII. RECOMMENDATIONS AND OPPORTUNITIES FOR 2018

- Continue to focus advocacy efforts on increasing the number of successful WAT completers being transitioned to Goodwill’s Supported Employment/job coaching programs.
- Continue to increase efforts to transition successful WAT completers into permanent positions within Goodwill retail stores.
- Increase efforts to meet demand for WAT services by agency funders to expand program sites to alleviate wait time for services in Hampton, Newport News and Portsmouth.
- To increase efforts to meet demand for WAT services by agency funders to re-open the program site in Chesapeake (Cedar Road Retail Store).

**WORK ADJUSTMENT 2017 DEMOGRAPHICS**

<b>Work Adjustment Served 158</b>					
Age Group		Ethnicity		Gender	
0-11	1%	Null	36%	Female	39%
16-24	46%	Arabic	1%	Male	61%
25-34	21%	Asian	1%	Grand Total	100%
35-44	11%	Black or African American	42%		
45-54	14%	Hispanic or Latino	1%		
55 and over	8%	Native Hawaiian and other Pacific Islander	1%		
Grand Total	100%	White not Hispanic or Latino	19%		
		Grand Total	100%		

# **VOCATIONAL SERVICES – Transitional Services/Job Coach Training Services (JCTS)**

*Report prepared by: Stephanie Porter-Lopez, Operations Manager*

## **I. OVERVIEW**

The Transitional Services/JCTS program provides an intense level of job coaching support with job placement in the community and subsequent job-site training once employment is secured. An Employment Specialist (ES) searches for the appropriate job for the customer in the community, and enrollees typically require less than 90 days of ongoing support. Customers enrolled in this program DO NOT require ongoing, long-term supports after initial employment stabilization. In addition to meeting the facility admission criteria for Vocational Services, program participants must also meet the following criteria:

- Be eligible for services through the Dept. of Aging and Rehabilitative Services and/or a Community Services Board (CSB) or have a reliable funding source to support job development and initial job training.
- Require on-the-job training and support in order to maintain employment.
- Be willing to participate in the job search.
- Express interest in obtaining and maintaining competitive employment.
- Have reliable transportation (public, specialized transportation, family/relative, personal vehicle, etc.).

## **II. PRIMARY FUNDING SOURCE**

- Department of Aging and Rehabilitative Services (DARS)
- Department for the Blind and Vision Impaired (DBVI)

## **III. SERVICES**

Transitional/JCTS job coaching services can include the following:

- Bus training
- Completion of a task analysis
- Development of a resume and/or completion of job applications.
- Support and advocacy during community job interviews.
- Pursuit and securing of community employment.
- Hands-on training by ES in a community business.
- Monitoring of the participant's home and work environments to ensure the individual maintains employment

**IV. EXTENUATING AND INFLUENCING FACTORS**

Prioritization of services based on DARS funding month to month did impact referral to JCTS. Clients in most severe disabilities (MSD) categories more likely to require long term supports to maintain employment. The result was a decrease in the number served in Transitional/JCTS as opposed to Supported Employment services in Central VA and Hampton Roads.

**V. 2017 PROGRAM HIGHLIGHTS**

- 2 customers were served in 2017 in Hampton Roads Transitional/JCTS program.
- 1 of the 2 was placed into competitive employment for the year with an average wage of \$9.00 per hour.

**VI. ANALYSIS OF TRENDS**

Effective providers of Transitional job coaching services must achieve job placements in a timely manner, effectively screen referrals, maintain open lines of communication, market services effectively, manage staff turnover so that it does not adversely impact services, and deliver services at a competitive cost. Community referral/funding sources will continue to use this service to secure employment for customers with disabilities.

Customers with the most severe disabilities (MSD Category) continued to receive first priority for job placement services in 2017, the majority of which were referred for Supported Employment, as opposed to JCTS/Transitional program services. While services were provided to new JCTS enrollees in 2017, the fact that additional coaching support was ultimately needed to retain employment indicates that customers in the MSD category are better served in Supported Employment services.

**VII. RECOMMENDATIONS AND OPPORTUNITIES FOR 2018**

- Continued pursuit of alternative referral sources for JCTS services, other than DARS, in both Central VA and Hampton Roads.

**TRANSITIONAL 2017 DEMOGRAPHICS**

<b>Transitional Served 2</b>			
Age Group			
16-24	49%	51%	100%
25-34	51%	49%	100%
Grand Total	100%	100%	

# VOCATIONAL SERVICES – Supported Employment (SE)

Report prepared by: *Stephanie Porter-Lopez, Operations Manager*

## I. OVERVIEW

The Supported Employment (SE) Individual Placement program provides an intense level of support with job development, placement, training, coordination with referral sources, funders, and caregivers, counseling, and ongoing follow-along services. An Employment Specialist works collaboratively with internal Business development resources to search for the appropriate job opportunity for the SE job seeker in the community, with the expected outcome being long-term retention and the development of natural supports in that particular job.

## II. PRIMARY FUNDING SOURCE

- Department of Aging and Rehabilitative Services (DARS).
- Richmond Behavioral Health Authority (RBHA) and other local Community Services Boards (CSBs).
- Long Term Employment Support Services (LTESS) for ongoing job supports with qualifying cases.
- Medicaid/ID Waiver Funding.
- Department for the Blind and Vision Impaired (DBVI).
- Private Pay funding sources – i.e. family, private insurance, etc.

## III. SERVICES

Supported Employment coaching services usually include the following:

- Bus training
- Completion of a task analysis and placement report.
- Development of a resume and/or completion of job applications.
- Support and advocacy during community job interviews.
- Pursuit and securing of community employment.
- Hands-on training by an employment specialist in a community business.
- Monitoring of the participant’s home and work environments to ensure the individual maintains employment.

## IV. EXTENUATING AND INFLUENCING FACTORS

In 2017, organizational transition continued in staffing and caseload reconfiguring to accommodate changing business needs with minimal impact to service levels. Increased outreach to DARS offices was made in an effort to enhance existing partnerships, improve referral processes and communication where the need was identified, while addressing changing business needs in order to ensure a focused approach to meeting those needs. Some localities experienced an increase in referrals to SE within the first three quarters of 2017 and this helped to increase the number of people served to 205 in 2017, over the previous year of 179. Although

the Order of Selection was put in place in the fall of 2017, referrals remained stagnant and slowly declined throughout the remainder of 2017.

V. 2017 PROGRAM HIGHLIGHTS

- The program served 205 in 2017, with new enrolled total of 83, and a placed total of 34 at an average hourly rate of \$10.18

VI. ANALYSIS OF TRENDS

Providers of supported employment must continue to focus their efforts to achieve job placements in a timely manner, effectively screen referrals, maintain open lines of communication, market services effectively, manage staff turnover so that it does not adversely impact services, and deliver services at a competitive cost. Some localities experienced an increase in referrals to SE within the first three quarters of 2017 and this helped to increase the number of people served in 2017, over the previous year. Although the Order of Selection was put in place in the fall of 2017, the referrals slowly decreased or remained stagnant throughout the remainder of 2017. Customers with the most severe disabilities continued to receive job placement services via Supported Employment. Impact of decreased funding and hours for job development was experienced in last quarter of 2017. Along with these challenges, unanticipated staffing changes (i.e. turnover, vacancies, etc.) with the SE program in Richmond and Hampton Roads also had an impact on the ability to achieve set goals for placements and referrals.

VII. RECOMMENDATIONS AND OPPORTUNITIES FOR 2018

- Continued to explore alternative referral sources for SE services, other than DARS (i.e. CSBs, DBVI, Medicaid/ID Waiver, etc.)
- Continue to focus on implementing a caseload restructure of staffing assignments by territory, with a focus on hours rather than client counts while maximizing capacity of SE staff and addressing appropriate work/life balance
- Continue to focus on process improvements implemented to address efficiency, effectiveness, accountability and achievement of program and fiscal goals

**SUPPORTED EMPLOYMENT 2017 DEMOGRAPHICS**

<b>Supported Employment Served 205</b>		
Age Group		
0-11	1%	25%
16-24	28%	1%
25-34	36%	54%
35-44	17%	0%
45-54	8%	20%
55 and over	9%	100%

Grand Total	100%
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# VOCATIONAL SERVICES – School-to-Work (STW)

Report prepared by: *Stephanie Porter-Lopez, Operations Manager*

## I. OVERVIEW

The School-to-Work Program (STW) is a skills-building, prevocational program designed to combine skills-building activities with real-world, on-the-job training and wage earning. The program emphasizes behaviors, attitudes, and skills designed to improve work-related behaviors to achieve an optimal level of functioning and performance. The program is devoted to work assessment, skills-building, and training activities, while integrating opportunity for discussion and learning. Approximately 80% of the program time is available for wage earning for the enrolled participants.

## II. PRIMARY FUNDING SOURCE

- Department of Aging and Rehabilitative Services (DARS)
- Public School Systems (i.e. Colonial Heights and New Kent High Schools)

## III. SERVICES

Skills that are developed and topics that are addressed during the program include, but are not limited to, the following:

- Interpersonal relationships with supervisors and coworkers.
- Developing work-related communication skills.
- Production quality and quantity of work.
- Physical and emotional tolerance for work.
- Decision making and judgment skills.
- Development of realistic vocational goals.
- Attitude, motivation, and flexibility.
- Personal grooming, hygiene, and appearance.

## IV. EXTENUATING AND INFLUENCING FACTORS

Due to a continued shift in academic and funding priorities in the Public Schools system in the 2017 school year, there continued to be a significant decrease in the number of students to be referred for the STW Hampton Roads. There was continued and increased interest in CVA resulting in the STW programs at Colonial Heights (CH Public School) and Mechanicsville (New Kent High School). Late in 2017, Portsmouth Schools reached out to Goodwill with interest to revisit the STW partnership in Spring of 2018 in collaboration with Portsmouth DARS.

## V. 2017 PROGRAM HIGHLIGHTS

- Partnerships maintained with DARS as well as staff from Colonial Heights High School and New Kent High School as School-to-Work program services continued.
- 11 Students were served in 2017, 73% of number served in 2016

## VI. ANALYSIS OF TRENDS

Although 2017 programs were negatively impacted by a shift in school budget and academic priorities, the STW program model is received as a very valuable workforce readiness training opportunity for students to explore the world of work and develop career interests in the process. The STW program is also received as a viable option for students who may benefit from the experience of work as they may likely not be going on to higher education after graduation.

Based on the reputation of our School-to-Work programs, community agencies and school systems have sought partnership opportunities with Goodwill to integrate these STW services in their students' Individual Education Plans (IEPs). However, determining a consistent funding source continues to be the challenging obstacle and commitment for school districts. Positively, with changing funding policies and mandates of WIOA, more opportunities may exist for partnerships between community partners, DARS and school districts. Portsmouth and Chesapeake Public Schools have expressed their interest in STW program at Portsmouth and Cedar Road Goodwill Retail Stores along with their funding commitment in 2018.

## VII. RECOMMENDATIONS AND OPPORTUNITIES FOR 2018

- There is demand for STW services by school systems in Portsmouth and Chesapeake Public Schools for STW programs . We will continue to explore possibility of available funds from these school systems and local DARS offices for programs start up in fall 2018
- We will look for innovative opportunities to assist schools in offering vocational programs to students. We will continue to focus on maintaining the existing School-to-Work program partnerships in CVA, while exploring opportunities to develop new partnerships as the needs are presented by school partners in Coastal localities.

## SCHOOL TO WORK 2017 DEMOGRAPHICS

School to Work Served 11					
Age Group		Ethnicity		Gender	
16-24	100%	Null	92%	Female	47%
Grand Total	100%	Black or African American	8%	Male	53%
		Grand Total	100%	Grand Total	100%



# VOCATIONAL SERVICES – AbilityOne

*Report prepared by: Stephanie Porter-Lopez, Operations Manager*

## I. OVERVIEW

The AbilityOne definition of “severe disability” is a severe physical or mental impairment (a residual, limiting condition resulting from an injury, disease, or congenital defect) that so limits the person’s functional capabilities (mobility, communication, interpersonal skills, self-care, self-direction, work tolerance, or work skills) that the individual is unable to engage in normal competitive employment over an extended period. Business Development, Staffing Recruiters and the referring Employment Specialist work collaboratively to match persons with severe disabilities to jobs on our AbilityOne contracts, of which there are several locations in the Central Virginia/Richmond and Hampton Roads areas. Because these employees need a supportive work environment and various accommodations to maintain employment, ongoing support is provided by an Employment Specialist or Case Manager.

## II. PRIMARY FUNDING SOURCE

- Department of Aging and Rehabilitative Services (DARS) for job-site training.
- Long Term Employment Support Services (LTESS) funding for ongoing job supports.
- Richmond Behavioral Health Authority (RBHA) funds for ongoing support for clients who meet the RBHA criteria for this service.

## III. SERVICES

Program participants are eligible to receive the following services:

- Specific job matching to available jobs at an AbilityOne contract site.
- Supportive work environment, with appropriate levels of supervision, which may not be available in a community business.
- Support from an assigned Employment Specialist to improve job skills and work habits.
- Hands-on, job-site training supports provided by an Employment Specialist with learning tasks related to janitorial, shelf-stocking, and/or warehouse/material handling.
- After achieving the appropriate level of stability at an AbilityOne site, the participant will receive supports to achieve competitive placement in community employment.

#### IV. EXTENUATING AND INFLUENCING FACTORS

At Ability One sites in 2017, a continued emphasis was placed on recruitment and job retention efforts to address a variety of reasons for turnover, including transportation limitations, medical issues, productivity barriers, etc. With the addition of an Ability One Recruiter position to provide staffing support to referral sources and Ability One applicants as well as the efforts the Business Development team to engage community partners and referral sources, placements at AbilityOne sites have been maintained. Direct placements to Ability One sites continued to be channeled through Supported Employment/Job Coaching Training Services programs. There was continued improvement in the seamless service delivery and process of Direct Placements at AbilityOne sites, likely due in part to the implementation of the partnership with Ability One Recruiter, Vocational Services and community referral partners.

The SPAWAR contract in Charleston, South Carolina, continued to improve by strengthening the existing partnership with the Departments of Mental Health and Veteran Affairs to improve recruitment and hiring efforts. The Ability One Recruiter also assists the Charleston, SC, SPAWAR contract in the recruitment and screening efforts of contract applicants.

#### 2017 PROGRAM HIGHLIGHTS

- 142 customers served at AbilityOne Program Sites in 2017.
  - A slight increase of 9% in customers served from 2016
  - 14 new enrollments and placements were secured in 2017 at AbilityOne sites.

#### V. ANALYSIS OF TRENDS

The increase in the number of placements and the overall number of customers served at AbilityOne sites in 2017 was due in part to the continued impact of the re-alignment of internal resources to include a dedicated Ability One Recruiter to provide staffing support to referral sources and Ability One applicants, as well as the efforts the Business Development team to engage community partners and referral sources and Vocational Services team to support customer needs.

#### VI. RECOMMENDATIONS AND OPPORTUNITIES FOR 2018

- Continued focus on recruiting/interviewing/hiring process at AbilityOne sites, involving the following three parties: AbilityOne Recruiter (Staffing), Supported Employment staff and AbilityOne site managers/supervisors.
- Continued focus on retention efforts at the all Ability One contract sites with the assignment of a dedicated Employment Specialist to provide needed level of support to intensive and non-intensive Ability One customers.
- Continue focus on Business Development community outreach efforts to referral sources, schools and other agencies to recruit and place individuals at Ability one sites.

## ABILITY ONE 2017 DEMOGRAPHICS

Ability One Served 142					
Age Group		Ethnicity		Gender	
Null	1%	Null	17%	Null	1%
16-24	9%	Asian	1%	Female	23%
25-34	38%	Black or African American	56%	Male	76%
35-44	19%	Hispanic or Latino	2%	Grand Total	100%
45-54	19%	Unknown	2%		
55 and over	16%	White not Hispanic or Latino	23%		
Grand Total	100%	Grand Total	100%		

## VOCATIONAL SERVICES – Supported Employment Group Model (Enclave)

*Report prepared by: Stephanie Porter-Lopez, Operations Manager*

### I. OVERVIEW

The Enclave Program is designed to provide employment opportunities for individuals with disabilities who can work in an integrated employment setting with ongoing supervision. Individuals work in groups of 3-8 under the supervision of an Skills Trainer at a business in the community. Current sites include Goodwill retail stores. This program provides an intense level of support including the development of an individualized service plan, job placement, training, and ongoing follow-along services with the focus on appropriate placement and retention. With this Supported Employment Group model the Skills Trainer remains at the employment site during the assigned shift and serves as the primary supervisor for the enclave associates.

### II. PRIMARY FUNDING SOURCE

- Department of Aging and Rehabilitative Services (DARS)
- Long Term Employment Support Services (LTESS)
- Extended Employment Services (EES)
- Medicaid Waiver – Department of Medical Assistance (DMAS)
- Richmond Behavioral Health Authority (RBHA) and other local Community Service Boards (CSB's)
- Private Pay funding sources – i.e. family, private insurance, etc.

### III. SERVICES

Enclave services offer training and specialized supervision to individuals who require ongoing supports but are able to work in an integrated setting. These services assist those unable to perform a job without continuous support. Participants in the Supported Employment Group Model receive the following services:

- Case Management Services
- Individualized Person Centered Plan, to include behavior planning if applicable
- Job Placement
- Job Training
- Ongoing Follow Along Services
- Advocacy, coordination and linkage to appropriate community resources as needed
- Future employment opportunities in Goodwill retail stores if applicable and the opportunity to transition to the Supported Employment Individual Model if appropriate

#### IV. EXTENUATING AND INFLUENCING FACTORS

During 2017, Skills Trainers also functioned as Case Managers. This mirrored the staffing design of teams in Hampton Roads. In addition, changes to transportation required the shifting of participants to different enclaves to meet their transportation needs in 2017.

Other factors influencing the enclaves include changes in WIOA regulations which will require us to meet new standards for competitive integrated employment. The foundation for these changes has been implemented with the training and roll-out of Teaching Social Skills strategy. Program designed will incorporate job skill and social skills development while assessing, coaching and training to assist enclave associates with achieving goals specific to their individual service plans. This opportunity will also allow associates to be introduced to other job tasks and skills within the store setting. As we meet the required competitive integrated employment model, increased referrals from DARS will be attainable to meet vacancy rates.

#### V. 2017 PROGRAM HIGHLIGHTS

- 86 Customers were served in 2017, with a total of 8 new enrollments and placed in positions that paid an average of \$7.25 per hour.

#### VI. ANALYSIS OF TRENDS

While WIOA is requiring a more competitive integrated experience for participants, the Group Supported Employment model remains a viable option for individuals with disabilities needing employment support. As agencies continue to move participants to more integrated roles, participants will still have the freedom of choice to choose where and how they want to work. Goodwill's model will expand to offer a more integrated

experience while still providing needed supports for enclave associates who may be unable to be effective with multiple changes to their tasks or work environment.

VII. RECOMMENDATIONS AND OPPORTUNITIES FOR 2018

- Continue to conduct case management training for skills trainers to ensure needed development of skills to meet performance expectation, file documentation and funding requirements
- Continue to develop current model to meet needs of competitive integrated employment
- Ensure program model will provide participant training on diverse retail and social skills that will then allow those that are capable to matriculate from Goodwill into community employment and open opportunities for new participants to enter the program
- Train and develop skills trainers on standardized, evidence based training practices to ensure fidelity in delivery of program services

ENCLAVE DEMOGRAPHICS 2017

Enclave Served 86					
Age Group		Ethnicity		Gender	
16-24	5%		10%	Female	54%
25-34	37%	Black or African American	33%	Male	46%
35-44	20%	Hispanic or Latino	2%	Grand Total	100%
45-54	25%	Unknown	0%		
55 and over	14%	White not Hispanic or Latino	56%		
Grand Total	100%	Grand Total	100%		

# RISK MANAGEMENT

*Report prepared by: Bill Forbes, Director, Risk Management*

## I. MISSION/PURPOSE

The Asset Protection department was renamed in 2017 to Risk Management because the department's functions: Safety, Compliance, Asset Protection and Industrial Security, all support the organization's risk management initiatives.

The purpose of the Risk Management department is to protect the organization's assets which includes people, facilities, tangible and intellectual property, merchandise, money and its reputation. This also involves identifying and assessing risks and assisting functional leaders in mitigating the impact of those risks. In addition, the department administers the security program for Government Contracts division (GSI) according to federal government standards outlined in the National Industrial Security Program Operations Manual (NISPOM).

The Risk Management department embraces the values-based leadership approach and is customer service driven to support all functional areas in the organization. More specifically, the department is responsible for enterprise risk management, regulatory and operational compliance, physical security, loss control, criminal investigations, health and safety programs, disaster recovery planning, emergency response, property and liability claims management and safety and security awareness training. Risk Management has a significant economic impact on the organization and positive influence on net contribution.

The Risk Management department is composed of the following team members:

1. Debra Ferguson, Sr. Manager, Compliance
2. Jean McRae, Compliance Specialist
3. Mark Sacra, Safety Manager
4. James Schoonover, Regional Asset Protection Manager (Coastal Virginia)
5. Jorge Balcaceres, Regional Asset Protection Manager and Assistant Facility Security Officer (Central Virginia)
6. Bill Forbes, Director, Risk Management and Facility Security Officer

## II. PERFORMANCE INDICATORS FOR 2017

Department General Performance Objectives:

- Manage expenses favorably to budget
- Department associates complete at least 26 hours of learning and development
- Complete all projects on time and budget with emphasis on quality

Safety Objectives:

- Install AEDs at 12 locations to complete the three-year rollout plan
- Advance Disaster Recovery Plan efforts by documenting essential services and recovery actions for each functional area
- Work towards Blue rating in Willis Risk Management program
- Assess newly established safety and claim objectives for implementation into the 2018 annual planning and performance evaluation process.

Asset Protection Objectives:

- Resolve criminal cases involving theft, fraud, embezzlement or policy violations relating to integrity
- Resolve IssueTrak tickets within 2 business days (Critical), 3 business days (High) and 4 business days (Medium) at least 90% of the time
- Regional Assets Protection Managers (RAPMs) complete one security assessment per store per year
- RAPMs complete a quarterly Logistics Security Audit for their areas

Compliance Objectives:

- Stabilize Audits (Billing, Case File, TIE, HR, I9)
- Prepare CARF documents (Annual Outcome Report, Satisfaction Survey)
- Participate on Case Management System implementation
- 100% case file audits (preparation for CMS)
- Test new case file maintenance process (Vocational Services)
- Revise audit forms and deliver training (TIE, Enclave, HR GSI, WAT)
- Lead preparations for CARF survey (Q1 2018 survey)
- Draft Enterprise Risk Management (ERM) plan
- Finance risk management session (will be included in ERM plan)

Industrial Security Objectives:

- Meet all security standards set forth in the NISPOM

### III. ACCOMPLISHMENTS FOR 2017

Department General Accomplishments:

- Managed expenses favorable to budget by over 9%
- All team members exceeded learning and development objectives
- Successfully managed the following projects:
  - Closed High Street store and opened its replacement
  - Opened Tuckernuck Attended Donation Center
  - Opened Laburnum store
  - Completed Phase II renovation at Hampton Support Center
  - Closed Portsmouth Community Employment Center (relocated operations to 1911)
  - Opened Strawbridge store

Safety Accomplishments:

- Completed three-year rollout of AEDs (defibrillators) to all sites
- Coordinated CPR/First Aid training for the organization
- Coordinated fire extinguisher training by Hampton FD at Hampton Support Center
- Essential services and recovery actions documented for 95% of functional areas as part of the Disaster Recovery Plan initiative
- Written safety objective recommendations were furnished to operations Directors for implementation into the 2018 annual planning process and 2017 performance evaluation cycle.

#### Asset Protection Accomplishments:

- Resolved 10% more internal theft cases than previous year
- Resolved customer work tickets within 2 business days (Critical), 3 business days (High) and 4 business days (Medium) 90% of the time
- Completed all store and logistics security assessments

#### Compliance Accomplishments:

- The Compliance Team learned all audits, designed reporting, and updated process flows
- CARF Annual Report and Satisfaction Survey completed
- Compliance Team has been an active participant on the Caseworthy project team with implementation planned for early 2018
- 100% of case files audited in preparation for CMS implementation with corrections reported to management
- New case file maintenance process was tested and shortfalls such as the escalation process were noted and reported to management for correction
- Audit forms were revised and training offered for same
- CARF preparations began in the Fall of 2017 and are continuing to early 2018 to include electronic delivery of data to the Surveyors
- Finance risk session will be carried over into 2018 as part of the ERM plan
- ERM strategic plan completed and presented to ET. Tactical plan drafted and will continue into 2018 where execution will begin.

#### IV. AREAS NEEDING IMPROVEMENT

- Continue to work towards achieving Blue rating in Risk Management program
- Finish Disaster Recovery Plan and begin tabletop exercises
- Begin implementation of Enterprise Risk Management (ERM) program throughout the organization to include a risk survey and risk index with prioritization of top-tier risks
- Support Caseworthy Case Management System implementation and revamp compliance/quality assurance audits to coincide with the system
- Reduce compliance errors and focus on quality assurance



- In step with ERM, expand scope of compliance monitoring and focus QA efforts on the top-tier risks approved by Executive Team
- Continue to encourage all operating units to incorporate safety compliance requirements into their performance management to improve accountability
- Seek out POS register report capabilities to better identify training and theft detection risks
- Encourage all departments/functional areas to assess and manage/mitigate risks in their operations, effectively applying risk management discipline in all their processes, particularly when exploring new business ventures

## V. ACTIONS TO ADDRESS IMPROVEMENTS

- Demonstrate Values Based Leadership in all that we do
- Gain leadership support in the implementation of injury reduction strategies
- Host reinspection of Risk Management program to achieve Blue rating
- Finish updating Disaster Recovery Plan and schedule tabletop exercises
- Compliance to transition to an ERM and quality assurance approach
- Continue the Asset Protection Job Shadowing Program to support People First focus
- Continue safety, security and compliance support services to help the organization meet its business goals
- Continue administrating the industrial security program in support of Government Contracts division

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# DEVELOPMENT

*Report prepared by: Andrea L. Butler, Director, Development and Community Relations*

## I. MISSION/PURPOSE

The development department manages GCCVA's philanthropic advancement efforts to raise funds in support of the mission. Key functions of the department include managing a territory-wide annual fund and grants program to secure funds from public and private sources to support workforce development programs and capital activities. These fundraising activities encompass strategic planning, building mission awareness and developing donor relations, cultivation and stewardship programs. The department director serves on GCCVA's executive team.

## II. OVERVIEW

In 2015, GCCVA's Board voted to begin building philanthropic revenue through a dedicated development department. Historically, GCCVA was focused on periodic capital campaigns as needed, as opposed to creating a long-term program to grow a large base of ongoing support.

Andrea Butler joined GCCVA in July 2016, and she added and recruited these positions:

- Grants specialist
- Annual Fund Manager
- Community Relations Manager

Initial assessments showed that donor data has not been consistently managed, therefore reporting and analysis is difficult; donors have had few opportunities to interact with Goodwill or stay abreast of its activities; grants are not reflective of strategic priorities and the success rate of securing and renewing grants is average.

In addition, other departments have relationships with donors – chiefly the commercial donated goods division within Retail Operations – and the Development department will explore efficiencies to create a single data-capture system to use for reporting, analysis, cultivation and stewardship. The definition of donors is now expanded to include donors of time (volunteers), money and goods through commercial channels.

## III. PERFORMANCE INDICATORS

- Re-activate the \$3.5 campaign to raise the final \$1.1M needed for expansion
- By 2025, increase the current grant win rate from 50% to 75%, and grow the program from \$500,000 annually to \$1.5M annually.
- Broaden the base of active donors from 200 to 300 in 2017.
- Increase unrestricted individual gifts from \$66K in 2015 to \$100K in 2017.
- Steward and re-connect with lapsed donors, including former Board members.

- Assure high levels of donor gift allocation accuracy and data integrity.

#### IV. ACCOMPLISHMENTS

- Increased unrestricted community giving by 43%
- Launched a community awareness program including an e-newsletter and monthly tours
- Created an integrated framework with Community Workforce division to strategically prioritize and pursue grants, including development of program budgets and logic models

#### V. AREAS NEEDEDING IMPROVEMENT

- Expand the base of support to increase unrestricted giving
- Closing out the expansion campaign in absence of a strong Annual Fund
- Donor data management

#### ACTIONS TO ADDRESS IMPROVEMENTS

- Developing the tier of \$1,000+ donors – The Ambassadors Society – to establish a stronger base of ongoing support
- Allocate more of director and CEO's time to campaign fundraising
- Engage Board members
- Increase mission awareness through more push-pull activities and systematic follow-up to grow the prospect list
- Develop documented data management procedures and implement regular reconciliation meetings with Accounting dept.

## **FINANCE**

*Report prepared by: Helen Dow, Controller*

### I. MISSION/PURPOSE

Proactive and responsive support of organizational financial needs and initiatives through best in class processes and timely and accurate reporting while centered on the protection of corporate assets.

### II. PERFORMANCE INDICATORS FOR 2016

#### a. Strategic Initiative focus for 2016

Our focus is to continue process improvements to enable our department to operate efficiently. By continuing improvements, we operate from a position of strength; responsive and proactive to the projected operational growth. Focus on financial strength, internal support balance and efficiencies through aggressive growth.

#### b. Financial and People goals

To continue support and improvement from training and cross-training of financial personnel. Invest in the training and growth of finance personnel, enabling them to stretch to new areas within finance or internal promotion.

##### i. Investment in our personnel and their work

- The challenge for Finance in 2016 is to be engaged and supportive of the process change work done with Curtis and S.I.R. With our support and collaboration, we will be able to provide financial guidance and support to ensure fiscal responsibility of the new processes.

- Our focus is to continue process improvements to enable our department to operate efficiently and increase the quality of services to the other departments. This will be done by focusing on our people to give them the tools they need to do important value added work.

##### ii. Support of pilot tests of a new Point of Sale system for retail.

##### iii. Administrative percentage goals – To support the operational growth with efficient relational increases in the indirect cost structure. A focus on better allocation of direct costs to direct operational groups.

##### iv. Assisting other departments in recognizing appropriate spend. Providing analysis and insight into operational trends.

- v. Continued support of the Purchasing department's success in reducing the overall costs and resulting in better decisions of the organization.
- vi. Continued access to transactional detail, allowing more transparency into the department's spending by management.

### III. ACCOMPLISHMENTS FOR 2016

#### Financial

- The Finance Department stayed within budget for the 2016 year.
- Assisted other departments with spend analysis on a monthly basis.
- Monthly reviews of purchase card spend for compliance.
- Assisted the organization in the annual budget process.
- Preparation and distribution of monthly financials
- Reporting to the organization, banks and donors as required.

#### Operational changes

##### Payroll

In an effort to be operationally lean, by removing redundancies and rework in the onboarding process in HRIS, the data entry role was moved to Finance. This position represents an FTE add in Finance which is a full FTE shift from HR (80%) and GSS (20%).

- Improved the PCNs by working with IT to develop a workflow, allowing edits, rejects and approvals between the submitting manager and payroll.
- Worked with IT on the PCNs to allow smart input where fields open or close based on input.
- Created daily validations for identification of system error input. Notification of errors and offers correct values by looking to the data mart.
- Input errors in HRIS are almost non-existent by catching errors during or prior to system input and payroll runs.
- Automation of the 403b retirement payments and enrollments.
- Continued support of electronic procurement and budgets in the Microix system. Training, security and general assistance of departments and their users.

#### Sales Support

- A. Supported of pilot tests of a new Point of Sale system for retail. Successfully worked through implementation and issue resolution to allow for a go on a 2017 Point of Sale conversion.

#### IV. AREAS NEEDING IMPROVEMENT

- vii. We consistently work on staying efficient to be able to handle the work of an organization that continues to grow in size and complexity. We are looking to 2017 to assist in the development and reporting of new organizational metrics. These metrics are impact related and will be reflected on the monthly Scorecard.

#### V. ACTIONS TO ADDRESS IMPROVEMENTS FOR 2017

- i. Scorecard updates and new metric reporting
  - a. To assist the organization in with development of impact measurement reporting in the financial information.
- ii. Process Improvements –
  - a. Continued focus on the decrease in the cost of a spend cycle (cost per purchase).
  - b. Evaluation of current scanning technologies with a goal of access improvement and reporting.
  - c. Support of POS system and new and better reporting through a new Sales and Production database.
- iii. Training and Support
  - a. Continued support of the Purchasing department's success in reducing the overall costs and resulting in better decisions of the organization.
  - b. Teach and train users of financial information. New manager training on financial statements, budgets and any position specific responsibilities.
  - c. Train, lead and partner internal to Finance and other departments that are involved in Lean and Six Sigma projects.

# **HUMAN RESOURCES – Now part of “People Operations”**

*Report prepared by Christy Roberson, Vice President of People Operations  
(Human Resources / Learning & Development / Organizational Development / Inclusion and Diversity / Talent Acquisition)*

## **I. MISSION/PURPOSE**

We are strategic partners in supporting Goodwill’s mission by providing human capital services and solutions that align with the organization’s mission, strategic plan, values, and needs of our stakeholders.

- We collect, analyze, and report insightful data about our workforce to enable informed & strategic human capital decisions.
- We provide and administer competitively priced employee benefits and compensation programs to attract and retain the best and brightest associates from all walks of life and backgrounds.
- We promote a culture of inclusion and alignment of values within the organization where all individuals feel respected, are treated fairly, have access to career development, work-life balance, and ample opportunity to excel in their chosen careers.
- We provide learning solutions to help job seekers improve their employability, and internally within Goodwill to improve associate skills and manager’s ability to lead high performing teams.
- We provide Human Resources counseling to managers and associates, and ensure compliance with employment related regulations, laws, and policies.
- We execute Human Resources processes to facilitate accurate pay, benefits, compliance, and services and reporting to internal associates, vendors, and governing bodies.

## **II. PERFORMANCE INDICATORS**

- Associate Turnover
- Job Fill Rate and Total Jobs Filled
- Total Learning Hours per Associate

## **III. ACCOMPLISHMENTS IN 2017**

- Process excellence journey was continued from 2017 and resulted in a zero-defect rate for HR processes in the last 6 months of the year (I9's, Personnel Files, Ability One, 403(b), ACA, Affirmative Action, all regulatory reporting.) Talent Acquisition followed suit and rolled out process excellence procedures in 2017. This was achieved by assigning process owners, training them, documenting processes, auditing for adherence and holding associates accountable.
- Digitalization of Human Resources – expanded the HRIS capabilities which included paperless/digital personnel records, implementation of an on-line compensation system, on-line merit increase process, and benefits enrollment directly into HRIS. Resulted in cost reduction, simplified processes, new reporting capabilities and improved data security.
- Continued the implementation of Values Based Leadership training program to 32 new graduates; also implemented a New Manager introduction class.
- Associates received higher than budgeted number of training hours in 2017:
  - Exempt associates averaged 35 learning hours per associate vs. 25 hour goal
  - Full-time non-exempt associates averaged 17 hours per associate vs. 13 hour goal.
  - Part-time non-exempt associates averaged 12 hours per associate vs. 13 hour goal.
- Even though the local unemployment rate was reduced from 4.7 to 4.1%, the annualized attrition rate increased by only 1% over the previous year. We continue to seek feedback from our associates via focus groups, surveys, and exit interviews on how to make our work environment even better. Comparison of our turnover rate with other Goodwills and industry benchmarks shows us in a favorable position.
- Transitioned to self-insured benefits (versus fully-insured) which allowed for a plan design that better meets the needs of our associates by making some services free of charge and others to be offered before the deductible is paid.
- Developed and rolled out a consistent competency model for all associates at Goodwill.
- Initiated a diversity and inclusion journey by launching inclusion training for all managers, creating a veteran's network, having more community engagement with the Hispanic and LGBTQIA community, and completed other analyses to further identify opportunities.
- Developed and implemented a career paths in retail for entry level associates all the way through the Retail Operations Manager. Associates now have access to training opportunities and will know what is expected in order to advance their careers by reviewing the curriculum.
- Delivered over 10,000 training hours to job seekers through programs managed in our community workforce division.



- Facilitated internal recruiting processes to award 65 promotions in 2017, and fill 45% of open leadership positions with internal applicants. Also began tracking “Career Advancement” for lateral moves and other development opportunities. 732 Associates were hired into Goodwill, with a fill rate of 90% of jobs posted being filled and an average time to hire of 16.5 days.

#### IV. AREAS NEEDING IMPROVEMENT

- Pushing values based leadership training further into the organization to the supervisory level.
- Continuing to build knowledge and experience in using the new competency model, and begin calibrating results for the sake of consistency and fairness.
- Learning curriculum is still mainly delivered via leader-led facilitation which is expensive and not practical for a geographically dispersed workforce.
- Learning tracks for our community workforce division, to create knowledge and availability of career advancement opportunities in social services.
- Completing Learning tracks for the Retail District Manager level.
- Increased focus on wellness that results in a healthier workforce.
- Rollout of Teaching Social Skills coaching and feedback practices throughout the community workforce division as a consistent approach to skills development.

#### V. ACTIONS TO ADDRESS IMPROVEMENTS

- Offer Values Based Leadership training for supervisors and newly hired managers.
- Pilot calibration sessions to review performance for associates at the same job grade/job type to increase fairness and consistency in ratings..
- Begin offering more blended learning opportunities to reduce Goodwill classroom facilitation time, and enable other cost effective, technology enabled solutions (in-market trainers, relationships with colleges, webinars, and learning kiosks.)
- Develop career tracks for community workforce based jobs, by leveraging insights from the development of the retail career tracks program.
- Train all community workforce personnel on the Teaching Social Skills Model and continue to provide refresher training to newly hired associates.

## **INFORMATION TECHNOLOGY**

*Report prepared by: John Leopold, Vice President of Technology and Risk Management*

## I. MISSION/PURPOSE

The IT Department empowers the Goodwill Associate community to accomplish Goodwill's objectives through information technology by providing highly reliable, up-to-date software platforms, equipment, and technical support.

In doing so, we remain vigilant to our customers' service needs, strategic goals while acting in a fiscally responsible, ethical fashion with our end user base as well as vendor community.

## II. PERFORMANCE INDICATORS FOR 2017

- a. Maintaining a favorable to budget stance by delaying resource additions as well as cost controls.
- b. Help Desk Ticketing- Statistics pertaining to number of tickets versus resolution times are tracked and studied for patterns.
- c. Results of various IT procedural and security audits.
- d. Customer Satisfaction numbers from Surveys.

## III. ACCOMPLISHMENTS FOR 2017

- a. Implemented further modules of Kronos Workforce Ready, to more fully leverage platform. This year Performance and Salary Management were utilized "in system".
- b. Moved much of our server infrastructure and backups to Azure Cloud infrastructure to strengthen our stance against potential service interruptions, while controlling cost.
- c. Implemented new credit card processing provider (Sterling) and a full roll out of POS to all Donated Goods locations.
- d. Developed and implemented a Project Intake discipline to obtain better definition of requested project work.
- e. Replaced our old helpdesk ticketing system with a new platform, saving approximately \$2000 per month, while maintaining functionality.
- f. Began implementation of a case management platform (CaseWorthy) to improve our overall access to participant records and streamline reporting capabilities, while granting us additional capacities for expansion such as external client access.

- g. Over 11,000 help desk tickets processed in 2017.
- h. Moved the majority of our associate mobile accounts to T-Mobile from Verizon, with an anticipated savings of \$4000 per month over Verizon.

#### IV. AREAS NEEDING IMPROVEMENT

- a. Gap between technology capabilities of our customer and the technologies desired are growing. The desire to have complex technology solutions has outstripped our ability to increase internal staff skillsets.
- b. Lack of internal controls on associate behavior in terms of processes. Failure of associates to either follow process or fail to report issues with systems, does not constitute a platform issue. It's process, people, then platforms in our typical challenges to success.
- c. Lack of subject matter experts in key departments who can lend support to not only coworkers in regards to process, but also provide us information to properly capture their needs.
- d. Inadequate project management discipline and skill across the company to support the myriad of projects being undertaken at any one time.

#### V. ACTIONS TO ADDRESS IMPROVEMENTS FOR 2018

- a. Use our data analysis capabilities and skillsets to create actionable information from raw collected data. Find the business owner's needs, and meet those directly with our solution. Quick, direct access to information drives business efficiency, as opposed to masses of data being unusable.
- b. Enforce the process mapping and project management methodologies. No longer begin implementations for our clients before they fully document their current state. If this is followed, better solutions can be obtained for improved processes. Cautionary however to say that the methods must remain customer focused, as befits our unsophisticated culture.
- c. Enforce the use of a review group on new application requests, those of a more "systems" nature to assure future successes with the selected applications. Ensuring that applications are compatible with our stated strategies.
- d. We've provided exceptional technologies, now we must make sure our end users can use them to their fullest potential. Turn our customer interactions into learning opportunities. Study ticket trends to prescribe training tailored to

improving unit and individual associate skill sets. Create a variety of learning tools to meet the needs of the widest range of audience.

- e. Take steps to improve the user experience and versatility of the systems we've already installed. Make them more productive (GoodPoint). Refine existing systems to be more "mobile" friendly. Improve access and reliability of video conferencing technologies to encompass more sites.
- f. Implement architecture changes for our networks to further enhance reliability and improve our position in terms of business continuity in case of area disasters. Likewise eye all changes that touch Community Workforce with an eye to the customer experience.

## **MARKETING & COMMUNICATIONS**

*Report prepared by: Laura Faison, Creative Services Manager*

### **I. Mission/Purpose**

To increase mission awareness among a variety of audiences to promote GCCVA's revenue-generating social enterprises and support our mission, and to reach prospective users or our workforce development services. Audiences include job seekers, shoppers, donors, community employers, referral partners and associates.

### **II. Overview**

The Marketing and Communications (MarCom) department underwent management changes in 2017 with the departure of VP Derby Bracket on Jan. 1. We promoted a high performing staff member to manage daily operations and develop into a management role. Andrea Butler was promoted from Director of Development and Community Relations to VP of Mission Advancement and oversees MarCom and Development.

As part of the strategic planning process in 2017, leadership developed a new mission statement, purpose statement and vision statement; MarCom plays a key role in disseminating and integrating this information, along with a brand refresh.

Under the umbrella of Mission Advancement, MarCom is focused on increased mission awareness, return on investment, mission and revenue impact, internal customer satisfaction, and integrating MarCom, Development and Community Relations.

A new position added in 2017, content specialist, identifies and produce stories primarily related to the success of job seekers that we serve.

### III. Performance Indicators for 2017

- Demonstrate integrated planning and execution for MarCom, Development and Community Relations in order to increase community awareness.
- Develop a comprehensive MarCom plan reflective of the needs of all departments. Deliverables include budgeting, digital media, collateral materials, advertising, public relations, instore merchandising, branding, special events support and promotions, among others.
- Provide high-quality support to internal departments using the MarCom Service Center. Housed on GoodPoint, the Center offers several tools to support users organization-wide, enables users to submit and track requests.
- Track ROI on activities to adapt to changing needs. The Marketing ROI chart tracks media spending and messaging, changes in revenue, shoppers and donors, and growth of target audience engagement across all active social media channels and website.
- Measure key performance data related to goodwillvirginia.org traffic, visitor patterns and trends with Google Analytics.

### IV. Accomplishments

- Reduced advertising spending by 50% in an effort to streamline costs and create a baseline for marketing efforts through the second half of 2017. There was no measurable impact as a result of this cut.
- Integrated MarCom, Development and Community Relations planning and activities, resulting in successful cross promotions, community survey feedback and increased media coverage and tours for prospective supporters.
- Managed 105 requests for MarCom support, compared to 68 in 2016, including three store openings.
- Improved website engagement with an 11% increase in sessions and a 12% increase in unique users; prepared for new website to replace the current one and identified vendor; strong click-through results supported by paid search.
- Increased audience size and frequency of eNewsletter that's central to reaching our stakeholders; switched email platforms. Average open rate was 22% (industry average 18.6%), subscribership increased by 38% over 2016.
- Produced and published 26 profile/success stories in six months, creating an active library for all departments to use for a variety of purposes.

### V. Areas Needing Improvement

- Refining marketing measurement for success and KPIs.
- Develop a "periscope" culture to anticipate MarCom needs and manage resources.
- The bi-annual MAGIC human resources survey indicated that Associate communications is of key importance to our workforce.
- Current website is clunky, inefficient and does not deliver a great customer experience or meet the marketing objectives of various departments.

## VI. Actions to Address Improvements

- Explore tools and systems to measure impact in 2018.
- Capture and assess customer data and associate communication needs to inform marketing priorities and strategies.
- Support the new Community Workforce structure with messaging aimed at the B2B audience.
- Develop and launch (April 1) the new goodwillvirginia.org website to further support our “customer first” approach – putting the needs of customers, partners, and candidates as the focal point of all content.
- An associate communications work group composed of associates from various job grades and all departments will make recommendations to the Executive Team.

## **PURCHASING**

*Report prepared by: Doris Martin, Purchasing Manager*

### I. MISSION/PURPOSE

Our mission is to bring best practices in organizational procurement.

Our purpose is to purchase goods and services at the best overall value. The contract review function of Purchasing insures that agreements are in Goodwill’s best interest.

The centralization of Purchasing allows for an economy of scale, demonstration of a high performance skill set and allows for best practices.

### II. PERFORMANCE INDICATORS

- Manage expenses favorably to budget
- Department associates challenged to complete a minimum of 26 learning and development hours
- Complete all projects on time and budget with emphasis on quality
- Assure high level of quality control in managing all aspects of Purchasing
- Assure Microix data integrity
- Consistent or improved levels of customer satisfaction

### III. ACCOMPLISHMENTS

Purchasing – The Purchasing department continues to increase their breadth of products and services as they assist other departments.

- As an added layer of diligence, all contracts and agreements are required to be reviewed by the Purchasing Manager. The Purchasing Manager is completing a certification course in Contract Management, which will allow us to reduce or eliminate unfavorable terms, and will also allow us to add terminology to the agreements such as restrictions on price increases.
- We were able to negotiate better pricing on several commonly used, high volume items; i. e., Sterifab, thermal paper, etc., resulting in incremental savings.
- As reported last year, the NCPP (National Cooperative Purchasing Program) has allowed our Goodwill to take advantage of savings based on Goodwill's national volumes. This program has continued to develop. Due to the continued negotiating power of the NCPP, in addition to past savings, last year we saved an additional \$17,000 on our purchasing of paper products and chemical cleaning products.

#### IV. AREAS NEEDING IMPROVEMENT

- **Ease of ordering:** The Purchasing Department is dedicated to making the ordering process as simple and as user friendly as we can. In an effort to improve our internal customers' procurement experience, the Purchasing Department associates have conducted site visits to operational sites to gain a better understanding of their needs. Going to where the work is done has helped to improve our services. We have worked towards creating a comprehensive needs/usage ordering process for each site based on historical data, which has reduced order times and excess on-site inventory.
- **Ongoing training of ordering system:** The Purchasing Manager is working with retail store management teams in creating a system generated master order form of commonly ordered items. Using the master order form, along with usage reports, will greatly reduce the time involved in placing the monthly supply order for each site.
- **Record keeping:** Record keeping and organization is critical for the success and efficiency of our department.

#### VI. ACTIONS TO ADDRESS IMPROVEMENTS FOR 2017

- We will continue work towards keeping up to date files both electronically and physically (paper).
- We will use our data analysis capabilities and skillsets to create actionable information from raw collected data, find the business owner's needs, and meet those directly with our solution. Quick, direct access to information drives business efficiency.
- **CONTRACTS:** We will create actionable information by creating a database to track expiring contracts, renewal terms, and RFP's. This will be done to insure compliance, and to make sure that we are finding the highest quality at the best price.

# REAL ESTATE & FACILITIES

*Report prepared by: Ed Mack, Director Real Estate & Facilities*

## I. MISSION/PURPOSE

The mission of the Real Estate Management Department is to support the company's business plan by providing leadership, expertise, and management of site selection, development, construction and maintenance of real estate to be utilized by GCVA in conducting its operations.

The Real Estate Department is responsible for a wide range of activities including site selection and adaptation, lease/contract negotiations, construction/renovation, maintenance, and providing maximum adaptation and utilization of facilities within allocated budgets.

## II. PERFORMANCE INDICATORS

- Refinement of the selection process and identification of screening criteria for store property.
- Growth strategy for the next five years.
- Identification and selection of diverse methods of site identification and acquisition.
- Identification and selection of enhanced Attended Donation Center sites.
- Maintain an acceptable level of open repair tickets.
- 80%+ tickets closed in house.

## III. ACCOMPLISHMENTS

- Determined the minimum criteria for store and ADC property including optimal square footage, preferred location, traffic counts low to high figures, population density, average family income levels within ten minutes of store location, versatility of site (potential other uses).
- Refined the growth strategy for the next five years, taking into account our two major markets – Central Virginia and Hampton Roads. Identified properties that need to be replaced and developed relationships with development firms and real estate brokers.
- Opened 2 stores, Laburnum and High St. Opened 1 ADC, Tuckernuck. Identified and acquired a new retail site in Emporia.
- Constructed our 4th “Made in the USA” store. The building is constructed of at least 98% materials that were made in the USA.
- Completed 86% of maintenance tickets in house.



- Worked with Publix to keep our donation trailer at their Short Pump location.

#### IV. AREAS NEEDING IMPROVEMENT

Goodwill suffers from a preconceived negative “thrift shop” image with many landlords and localities, especially in the Hampton Roads area. Often a suitable location may be found, but the landlords are reluctant or refuse to lease to Goodwill. Goodwill must devote marketing resources to improve our image. Our maintenance techs would benefit from more extensive training in the fields of Electrical, Plumbing and HVAC.

#### V. ACTIONS TO ADDRESS IMPROVEMENTS

With financing, presently at an all-time low, Goodwill has now transitioned to a combination of purchased and leased sites. A cost analysis reveals that it is now cheaper to own properties than it is to lease, therefore depending on the company’s financial position at the time, additional raw properties may be considered either for development/lease and/or purchase.

To be able to capitalize on opportunities and maintain consistent growth, Goodwill leadership will need to continue to plan strategically and maintain the flexibility to be prepared to quickly commit to future sites and targets of opportunity as they are presented.

Working with regional community college partners, obtain training for Facilities Technicians.

## **RETAIL OPERATIONS**

January, 2018

Prepared by: Martha Murdock, Director of Retail Operations

### **Mission/Purpose:**

*To create pathways to opportunities and success for job seekers facing challenges to work.*

*We believe that work is a foundation for empowering individuals, strengthening families and building prosperous communities.*

Retail Operations Support Team engages, educates, and motivates store leadership and staffs to meet revenue, net contribution and associate satisfaction goals. This is done through the sale of donated goods through our retail store locations.

Our organization has 32 retail store locations, 2 “Buy by the Pound” Outlets and 2 Computer stores. Over 550 associates are a part of the Retail Operations Team in all locations. The store teams are compelled to operate strategically and responsibly to continually improve net contribution to pass this profit to the Community Workforce side of our organization. The

stores also provide opportunities for clients who are seeking employment and opportunities to grow their skills.

### Performance Indicators:

- Retail revenue vs. budget and last year
- Net contribution vs. budget and last year
- Expense to revenue ratio
- Salary to revenue ratio
- Associate satisfaction survey results
- Retail market share
- Revenue per household
- Net contribution per household
- Sales per square foot, retail selling space
- Donations per square foot, retail selling space
- Donations per household,
- YTD percent of after-retail revenue

### Accomplishments:

- Values Based Leadership Training in 2017 has been brought to our Retail Operations Managers and Lead Associates.
- Moved the Portsmouth store into a new location, reopened in March, 2017.
- Opened the Laburnum Station store on the East End of Richmond.
- Opened Strawbridge store in Virginia Beach.
- Worked on the changes in Community Workforce as it applied to the supported work teams' in our stores.

### Areas Needing Improvement:

- Retail Store leadership/promotion and development from within.
- Timely resuscitation of down trending stores.
- Workgroups—quality of experience, management teams need to be trained to understand how to step in to cover.

### Actions to Address Improvements:

- New store opportunities/Emporia to open in June.
- ADC site selection/more “under roof” ADCs in the Hampton Roads area.
- Marketing/social media—spending the dollars the right way, use of social media.
- Business Development/new Community Workforce Model, continues.
- Store Manager Performance Management.

Expenses and revenue figures for retail operations are included in the monthly financial and management reports. Detail information is available through the Director of Retail Operations,

monthly management reports and financial statements. This information is confidential in nature and might provide a competitive edge to other similar businesses, it is not in this report.

## **LOGISTICS**

*Report prepared by: Antonio Pride, Director of Logistics*

### **I. MISSION/PURPOSE**

The Logistics Team will provide superior customer service while ensuring the proper and timely collection and distribution of goods and material through the supply chain effectively and at the lowest possible cost.

### **II. PERFORMANCE INDICATORS**

- a. Expense and revenue figures for auction, transportation, the docks, Attended Donation Center operations s are included in the monthly financial reports.
- b. Operational performance indicators include on-time deliveries and pick-ups, safety reports and audits, driver logs, DOT regulation compliance reviews and equipment maintenance validation. Auction sales revenue, number of lots offered, lots sold, and lots passed and average sale price per item sold.
- c. Detailed information regarding these reports is available from the Director of Logistics.

### **III. ACCOMPLISHMENTS**

- a. First conversion of a trailer ADC site (West Park) to a stand-alone facility (Tuckernuck Square). Implemented sorting for retail outlets at Tuckernuck ADC in Richmond.
- b. 100% accountability for tangible assets maintained with zero loss.
- c. Supported the opening of two new retail stores (Gay Ave. and Strawbridge) and one store relocation (High Street)
- d. Successfully moved through all previous calendar year inventories before the end of the 3<sup>rd</sup> quarter of 2017.

### **IV. AREAS NEEDING IMPROVEMENT**

- a. Maximizing usage of brick and mortar ADCs to provide final sort goods for retail locations.
- b. Increasing efficiencies in product movement through the system.

- c. Locating sites for additional stand-alone Attended Donation Centers and finding additional revenue streams on ADC properties

## V. ACTIONS TO ADDRESS IMPROVEMENTS

- a. Performing final sort at ADCs
  - i. Collaborate with Director of Retail in creating a plan, to be tested at the Tuckernuck ADC
  - ii. Implement test plan strategy, monitor for successes/failures, adjust and perfect before attempting to spread to additional ADC
- b. Increase product movement efficiencies
  - i. Dispatch drivers based on most efficient routes
  - ii. Fill trailers to 100% before transporting
  - iii. Increase production and sale of salvage textile bales
- c. Brick and Mortar ADC acquisition and develop revenue generating opportunities
  - i. Collaborate with Director of Facilities in finding desirable locations for stand-alone ADC placement and soliciting revenue generating opportunities for our ADC properties
  - ii. Partner with sister GWs in idea sharing in the development of additional revenue streams

## **CONTRACT SERVICES**

*Report prepared by: Steve Huyck, Director of Contract Services*

### I. MISSION/PURPOSE

The mission of the Contract Services Division is to provide jobs for individuals with significant disabilities while earning net contribution for re-investment in Goodwill's Mission. The focus remains on putting people first and expanding business through core competencies in areas such as warehousing, logistics, janitorial, and facilities management.

## II. PERFORMANCE INDICATORS

- a. Financial:
  - a. Year-to-date Contract Services is 23% ahead of budget in net contribution.
  - b. Revenue is 3% ahead of previous year.
- b. People:
  - a. There were several internal promotions within Contract Services during 2017 as we reaped the benefits of associate development and our succession planning. The new opportunities enhanced personal career growth and produced a better standard of living.
  - b. The Contract Services division employs 234 associates.
  - c. The SourceAmerica ratio is 77% agency-wide and 74% at the Ability One contract sites.

## III. ACCOMPLISHMENTS

- a. Five Year Contract Award at SPAWAR Tidewater  
This is significant due to the government's desire to merge the SPAWAR Tidewater and SPAWAR Charleston contracts into one large contract by the end of FY 19.
- b. Successfully Negotiated and Obtained a New Commercial Janitorial Contract  
In mid-December Contract Services was awarded a janitorial contract at three different sites of John Tyler Community College. This new contract provides employment for 30 FTE's.
- c. Successfully Completed CIMS-GB with Honors Re-Certification  
One vehicle that helped with obtaining the new contract at John Tyler is our CIMS- GB with Honors certification. This widely recognized green cleaning certification is vital to our long term growth.

## IV. AREAS NEEDING IMPROVEMENT

- a. Operations at the Ft Eustis Commissary  
The government customer is satisfied with the services provided by GSI however, operations need to be streamlined and productivity increased. In addition, Ability One direct labor ratios have been below compliance level.
- b. Safety and Security  
Although there were no major incidents of concern in this area during 2017, Contract Services wants to ensure it continues to provide the very best work environment for our associates.

c. Business Development and Partnering Opportunities

Methods for obtaining new business that were successful in the past are no longer effective in identifying and securing new contracts. The traditional pipelines for government contracting have stopped producing opportunities.

V. ACTIONS TO ADDRESS IMPROVEMENTS

- a. We are working with the Central NPA, SourceAmerica to resolve issues at Ft Eustis.
- b. We are working towards enhancement of our safety policies and procedures and have implemented new processes in several areas.
- c. The Director of Contract Services joined the Goodwill Industries International Business Development Collaborative Steering Committee in 2017. Our goal is to learn from other Goodwill organizations and explore partnering opportunities that will produce new business.

## **GOODWILL STAFFING SOLUTIONS**

*Report prepared by: Shari Rossino, Operations Manager, Goodwill Workforce Solutions*

I. MISSION/PURPOSE

The mission of Goodwill Industries is to create pathways to opportunities and success for job seekers facing challenges to work. We believe that work is a foundation for empowering individuals, strengthening families, and building prosperous communities.

II. PERFORMANCE INDICATORS

- Total revenue in 2017 exceeded expectations.
- The average wage for a GSS employee \$11.37/hour.
- GSS placed 903 associates in various industries.

III. ACCOMPLISHMENTS

- Restructured agency infrastructure to full-desk operations, so Workforce Solutions Partners are recruiting for the respective accounts they obtain to ensure both job placement retention and employer satisfaction.
- Hired Operations Manager to oversee both sales and recruiting activities in collaboration with all partnering departments to bridge across organizational functions.

IV. AREAS NEEDING IMPROVEMENT

- GSS experienced a significant decrease in revenue as a result of operations changes from its largest account. As a result, efforts are concentrated in marketing to a higher number

of small and medium employers in addition to and in conjunction with a larger sized account.

- Highly competitive market with many large providers who are solely focused on temporary staffing.
- New staff persons to learn and build relationships.

#### V. ACTIONS TO ADDRESS IMPROVEMENTS

- The one key structural change to GSS is the addition of an Operations Manager to focus simultaneously on business development while maximizing seamless GSS operations.
- We will begin to target key markets and industries and develop tactics to leverage companies in close conjunction with the job seeking candidates working with the Community Employment Centers as well as the Education for Employment population.