



Community Needs Assessment 2019

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Revised and updated June 2019

Goodwill
Because jobs change lives

Executive Summary

“Seattle Goodwill provides quality, effective employment training and basic education to individuals experiencing significant barriers to economic opportunity. Because Jobs Change Lives.”



Seattle Goodwill Industries (SGI) covers a broad territory representing five large Washington State counties (King, Kitsap, Skagit, Snohomish and Whatcom) that are home to more than three and a half million people. Seattle Goodwill students come from very different communities including people of varied income levels, all different races and ethnicities, and those from both urban and rural environments.

The Puget Sound area has a strong economy and is home to many large technology and manufacturing companies, including Amazon, Boeing, and Microsoft. The local economy is currently thriving, and unemployment rates have steadily declined post-recession. However, economic recovery has been inequitable for many individuals and communities including people of color, immigrants, and rural communities. Income inequality has increased, and

the new economies that have emerged have brought rising housing costs and increased demands for particular skills in the labor market. While some people are prospering, many individuals continue to work in low-paid occupations and increasingly struggle with achieving economic independence, or even stability, as the local cost of living rises.

Goodwill conducts a Community Needs Assessment (CNA) every 4 years, and it is instrumental in providing Goodwill and community partners with a snapshot of current local demographics, community needs, and labor market information. The data helps to identify how effective Goodwill is in serving its community, as well as to identify potentials areas of improvement, and inform strategies for future job training and education programming. SGI has a mission to change lives through quality, effective employment training and basic education to individuals experiencing significant barriers to economic opportunity.

A lens of equity guided the design, research, and implementation of this work. Research focused on how regional economic development has impacted people of different races, ethnicities, and national origins, what needs remain unmet in different communities, and how labor market trends can guide the design of SGI programs to increase economic prosperity for all members of our communities. This research was conducted with a strengths-based philosophy which acknowledges that individual participants (in this case students) are experts. They possess knowledge and understanding about both the strengths

and needs of their communities and should be included when developing solutions toward stability and self-sufficiency. Community partners and employers also shared their expertise.

Below we explain the main implications that surfaced from the findings and provide some recommendations for SGI regarding target population, program portfolio, and program quality. The recommendations follow the main findings from the four sections of this report: Demographic Information, Participant Qualitative Research, County Narratives, and Labor Market Analysis.

Key Findings – Demographics

Increasingly Diverse Communities

The SGI service area has steadily become more racially and ethnically diverse over the past two decades. People of color in SGI's five counties now comprise about one-third of the region's total population, compared to just 15% in 1990.¹ The population of people of color is growing at a faster rate than the overall population in all 5 counties, and immigrant populations are growing at a faster rate than the overall population in King and Snohomish Counties.

Among persons of color, either Latinos or Asians comprise the largest race/ethnic groups in each county in the SGI service area. In King County, the Asian population accounts for 16.5% of the total population. In Snohomish County, the Asian and Latino population are similar, accounting for about 10% of the population each. In the three remaining counties, the Latino population is the largest. The African American/African population is 6% of the population in King County, but a smaller share of the population in the other 4 counties.

The SGI service area counties are home to more than 600,000 immigrants and this number continues to increase. Between 2012 and 2017, the foreign-born population in both King and Snohomish County increased at over twice the rate of the US-born population. This difference was largest in King County, where the foreign-born population grew by 19%, while the US-born population grew by 7%. In the remaining three counties, the opposite was true – the growth in the US-born population was at least double the growth of the foreign-born population.

Disparity in Employment Opportunity

All counties' unemployment rates are now the same or lower than they were before the recession. However, Kitsap, Skagit, and Whatcom Counties, which are the more rural counties in the service area, have lower labor force participation rates and higher unemployment rates than King and Snohomish Counties. The group with the highest labor force participation rate is people ages 25 to 45 in King County.

Certain populations are also experiencing higher unemployment rates than the overall average. African Americans/African have the highest unemployment rates of all races/ethnic groups in King, Kitsap, and Skagit County. In Whatcom County, both Native Americans and Latinos have a high unemployment rate. In Snohomish County, unemployment rates for all races/ethnicities are below 8.8%; the highest unemployment rate is among people who identify as two or more races. Unemployment rates for immigrants are lower than U.S. born individuals in every county except Skagit, where immigrants without citizenship have the highest unemployment rate of any group at 6.3%. Non-citizen immigrants have a higher unemployment rate than immigrant citizens in all counties besides Whatcom County.

¹ Puget Sound Regional Council, *Racial and Ethnic Diversity in the Central Puget Sound Region*, , April 11, 2018 <https://www.psrc.org/sites/default/files/trend-race-ethnicity-201804.pdf>

Youth unemployment (16-19) ranges from 14.6% in Kitsap to 23.6% in Skagit County. In all counties except Kitsap, the unemployment rate for teenagers (ages 16-19) is double that of young adults (20-24 year olds). In Kitsap County, they are almost the same, with young adults (ages 20 to 24) at 14.3%. Whatcom County had the highest unemployment rate for people ages 65+, and King County had the lowest.

Inequity in Educational Attainment

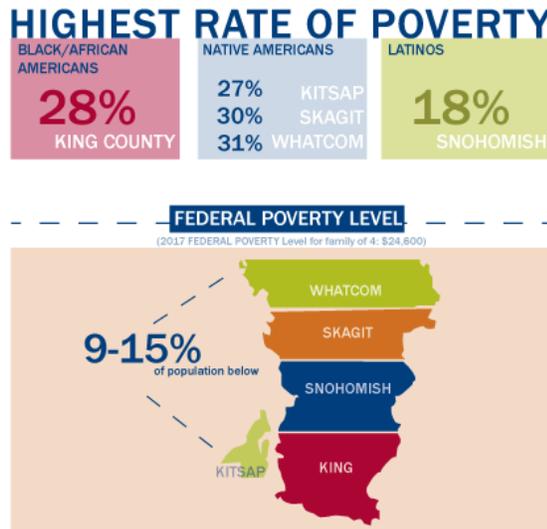
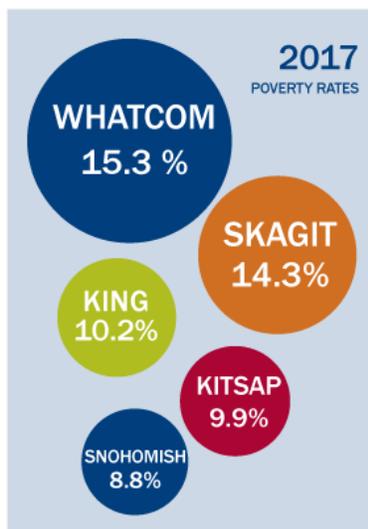
Among the racial and ethnic groups analyzed, Latino people were the most likely to not have a HS diploma in King, Skagit, and Whatcom County. In all counties except Kitsap, more than 27% of Latino individuals had less than a high school diploma. In Kitsap County, Asian and Native American people are the most likely to not have a diploma, and in Snohomish County, Native American people were the most likely to not have a diploma (28%). Of all groups, the group of people most likely to not have a diploma were Latinos in Skagit (43%).

King County has the highest rates of both Bachelor’s and Graduate or professional degrees; Skagit County has the lowest. Associates degree rates are similar for all counties, around 10% for all counties except King (8.2%). Kitsap has the highest rate of people with some college/no degree (29.9%) and the lowest rate of people with less than 9th grade education. Skagit County had the lowest education rates overall, with both the highest rate of people with both less than 9th grade (4.5%) and 9th to 12th grade education (6.6%).

People of all races and ethnicities, as well as citizenship and immigration statuses, in King County have a higher rate of Bachelor’s degrees or higher than the other counties. The group with the lowest percentage of Bachelor’s degrees or higher are Latinos (7.4%) in Skagit County. Skagit County has the highest rate of people with less than a high school diploma across people of all immigration and citizen statuses. Fifty five percent of non-citizens in Skagit County have less than a high school diploma.

Poverty: Wage Stagnation and Rising Cost of Living

Within the five counties, 9-15% of the population now lives below the federal poverty line. Between 2010 and 2017, all counties in the SGI service area, except King County, had a



slight increase in poverty. While poverty rates in all five counties did begin to decline around 2014 after the recession, only King County has achieved full recovery. Skagit County had the latest recovery. The poverty rate did not begin to decrease until

2016, and in 2017, it was still 14.3%, 4.3% higher than 2010.

Whatcom and Skagit Counties have the highest share of the population living at or below the poverty level. Poverty rates are lower among whites and Asians in all five counties. Native Americans have the highest rates in Kitsap, Skagit, and Whatcom Counties. African Americans/African have the highest rate of poverty in King County. Latinos have the highest rate in Snohomish County. Groups with over 25% poverty rate include African Americans/African in all counties except Snohomish, Native Americans in Kitsap, Skagit, and Whatcom Counties. Snohomish County is the only county where all groups had a poverty level of less than 18%.

Key Findings - Participant Research

A qualitative portion of the Community Needs Assessment was conducted to connect a face and human story to the statistics. First, focus groups were held with JTE students in each of the five counties, as well as three youth programs. Second, interviews were conducted with a group of community partners and employers that were suggested by Goodwill staff. Students from the University of Washington Evans School of Public Policy and Governance and a multidisciplinary team of JTE staff contributed to this portion of the research. This research was conducted with a strengths-based philosophy which acknowledges that individual participants (in this case students) are experts. They possess knowledge and understanding about both the strengths and needs of their communities and should be included when developing solutions toward stability and self-sufficiency.

Students

Students offered positive feedback including praise for Seattle Goodwill's instructors and staff, and appreciation for case management services and resources to remove barriers, particularly transportation assistance. Students suggested that Goodwill could make improvements around marketing and communication, additional class offerings, and computer/technology upgrades.

Students also offered feedback on the status of their communities. The responses represented diverse perspectives from a range of different communities. Students identified various resources for people in need, and many mentioned an appreciation for living in a diverse community. Areas that they identified for improvement included housing affordability, healthcare, dental care, transportation, and additional or different employment opportunities.

Community Partners

Interviews with the community partners echoed many of the same strengths and needs, as well as provided additional information from a systemic level about the work that Goodwill is doing and how services could be improved or expanded. Challenges identified included the accessibility and affordability of housing, mental health care, transportation, and childcare. They also identified that while many communities have available entry-level jobs, well-paying jobs that provide stability and a wage that is equal to the cost of living are in short supply, and students often do not possess the required skills, or may have barriers such as criminal backgrounds.

Community partners praised Goodwill's class offerings, professionalism, openness to collaboration, and more. Many community partners spoke highly about the quality of the Goodwill staff on an individual level. The staff are visible in the communities, reach out to the partners, and listen to the needs. Partners also stressed the importance of Goodwill continuing to reach out to its students and to small community-based organizations to engage and understand the needs of the community. Finally, partners suggested that Goodwill continue to work to hire staff that understand and reflect the diverse cultures Goodwill students come from, and reflect those cultures in their curriculum and choice of programming.

Employers

Most employers indicated that for entry level positions, there are not many specific technical skills needed, but a basic knowledge of computers, including Microsoft Office programs and email, is required for many positions. Employers indicated that an ability and willingness to learn was more important than knowing specific technology. Employers did identify essential soft skills that are highly demanded in the workplace, including communication skills and other personal qualities such as integrity, respect, and being passionate about the work. Several hiring managers mentioned the importance of resume writing and interview skills. Finally, some industries do have skill requirements that are harder to meet, such as a commercial driver's license or a basic understanding of mechanics and technology.

Key Findings – County Narratives

The County Narrative section helps provide a more detailed picture of community needs by examining local data and adding the perspectives and research from local organizations and community networks to the demographic data detailed above. Each community within the SGI service area is different, including the demographics, economy, and social service landscape. Reports from local organizations, including United Way, University of Washington, Kitsap Community Resources, Opportunity Council, Community Action of Skagit County, El Centro de la Raza, Whatcom County Health Department, and King County Hospitals for a Healthy Community were reviewed to assess county-level needs.



While local economies and unemployment rates have shown extensive growth in some areas, the economic opportunity is not being felt equally among all population groups. People of color, immigrants, younger and older workers, single mothers, and Justice Involved Individuals are reported as being particularly vulnerable to difficulties finding meaningful employment.

Housing stability was a key concern in nearly every SGI community. The robust economy has resulted in a large in-migration of workers for industries such as IT and manufacturing, and with it, increased demand for, and cost of, housing. In King County, many low-income people, immigrants, and people of color have relocated to North and South King County in search of lower housing costs. Many individuals in low-wage employment are increasingly struggling as the cost of living outpaces wages. Other significant needs across the SGI service area are access to medical and dental care, transportation, and access to nutritious food.

Each county also has a diverse collection of assets, resources, knowledge, and strengths. Assets that were identified included local community organizations, places of worship, tribal communities, public libraries, food banks, and school districts.

Key Findings – Labor Market Analysis

The last CNA for SGI was written in 2014. At that time, the Seattle Metropolitan area had mostly recovered from the 2009 recession, but rural unemployment remained higher than pre-recession levels. As of 2019, both Washington State and all counties in the SGI service area have unemployment rates that are at pre-recession levels. In October 2018, the Washington State unemployment rate was 4.3%, which is the lowest rate since the state began comparable record-keeping methods in 1976.²

Top occupational clusters within the SGI service area, based on the number of projected annual openings from 2018-2028, are included on the following list. The occupational clusters identified for possible new SGI training programs include: Retail and Sales, Transportation and Logistics, Construction, and Installation, Maintenance and Repair:



All counties showed growth in Retail and Sales, Transportation and Logistics, Construction, and Installation, Maintenance, and Repair occupations. However, given the vast size of the SGI service area and the diversity of sectors within the region, there are differences in priority, scale, and occupation type across counties.



Retail and Sales

There are many Retail and Sales positions in all 5 counties, primarily Retail Salespersons, and Cashiers, and Sales Representatives. Additionally, all counties, except Kitsap have a high demand for Insurance Sales Agents. King County also has a high demand for Advertising and Real Estate Agents.



Transportation and Logistics

Most people in the Transportation and Logistics cluster are employed as Laborers, Material Handlers, Hand Packers / Packagers, and Truck Drivers. Transportation and Logistics occupations are found in various sectors across

²<https://www.seattletimes.com/business/washington-unemployment-rate-drops-to-historic-low-of-4-3-percent/>

the SGI service area. For all counties except King, government is a major employer. In King County, Administrative Support is the top sector. Most of Skagit and Whatcom County's Transportation and Logistics jobs are found in the Trucking industry.



Construction

All counties have a high demand for Construction Laborers, Carpenters, and Electricians. All counties except Snohomish County have a high demand for Plumbers, Pipefitters, and Steamfitters. Both Snohomish and Whatcom have a high demand for Painters.



Installation, Maintenance, and Repair

The majority of Installation, Maintenance, and Repair jobs are General Maintenance and Repair workers. Automotive Service Technicians are in demand in all counties except for Whatcom. Heating, Air Conditioning, and Refrigeration Mechanics and Installers are in demand in King and Whatcom Counties. Aircraft Mechanics and Service Technicians are in demand in King and Kitsap Counties and Kitsap also has a demand for Riggers.

Installation, Maintenance, and Repair occupations are found in various sectors across the SGI service area. All counties have large numbers of positions in Repair and Maintenance and Specialty Trades. Other industries include Real Estate, Motor Vehicle Parts and Accessories, Transportation Equipment Manufacturing, and Government.

Overall Recommendations from CNA Findings

Target Population

1. Even as the economy improves, there are still populations that are experiencing high unemployment and barriers to economic opportunity including people of color, young and older adults, and certain immigrant populations. SGI should continue to focus on these populations for training and employment services.
2. SGI should continue outreach efforts to specific immigrant populations, including Latinos, for Adult Basic Education (ABE) classes.
3. Rural communities have experienced a slow economic recovery and have different populations and labor markets that will require strategies that are different from rural communities.
4. Information in the county narratives suggests that SGI should review current services to Justice Involved Individuals and youth to see if there are opportunities for expanded services.
5. SGI should continue to examine each county to develop and implement programming that meets the specific needs of local communities, including rural, racial/ethnic, immigrant, and tribal communities. Examples include program development in the Central District in Seattle, a historically African American neighborhood, increased collaboration with the Northwest Indian College in Whatcom County, or programming in Kitsap County for young adults.

Program Portfolio

1. While poverty persists for many individuals in SGI communities, it is contrasted by a thriving and robust economy. We recommend that SGI review current programs to help more students obtain and sustain high-demand, high-wage work. One possible opportunity is to expand the vocational training offerings. Key industries identified from labor market research for new programming include: Retail and Sales, Transportation and Logistics, Construction, and Installation, Maintenance, and Repair (Mechatronics). In the planning of new vocational programming, SGI should consider labor market variances among counties.
2. There is a continued need for skill attainment services, including High School Completion, ABE, Sector Pathways, and Youth Programs, in order to bridge the gap between employers' needs and job applicants' abilities. We recommend that SGI identify skill needs with employers in targeted industries as guidance for program curriculums and competencies.
3. Most SGI communities have rapidly increasing immigrant populations, and many immigrant communities are experiencing increased barriers to economic stability and opportunity, both due to actual policy changes on the national level, as well as an increase in anti-immigrant sentiments and white nationalism. In order to effectively serve immigrant communities, SGI will need to provide additional support services such as legal assistance, mental health services, and basic needs. Additionally, staff will require ongoing professional development around immigration issues and

trauma-informed practices. Job training for immigrants will likely include ESOL classes, Citizenship classes, Vocational Training, and possibly some type of Entrepreneurial Training.

4. Digital skills and technology skills are now required for most entry-level positions. We recommend reviewing current programming, both computer classes as well as additional programs and services, for opportunities to help students develop their digital literacy and fluency.
5. To maximize impact, leverage resources, increase student support, and improve outreach and connection with diverse communities, including people of color, rural communities, and immigrants, SGI should continue to build and maintain strategic partnerships in all counties.

Program Quality

1. While many people have benefited from the stronger economy, there are still many individuals experiencing barriers to employment, such as Justice Involved Individuals or immigrants, who often require more intensive services. Additionally, because of the increasing cost of living, students often require larger amounts of financial assistance for items such as housing. Thus, we recommend that SGI examine current policies to determine how to serve individuals who need a more intensive level of service.
2. As the communities we serve become more diverse, we recommend that SGI continue to conduct all activities with an intentional lens of equity, including providing ongoing training for staff, and implementing specific equity metrics, to ensure that SGI Job Training and Education (JTE) Centers are welcoming, inclusive, and supportive environments for all students.
3. We recommend that SGI improve strategies for collecting student, community, and employer input to better measure the quality of service and community impact. One suggested strategy would be student advisory boards.
4. There is a need for increased marketing and communication of JTE classes and services. This should be informed by both demographic research and cultural competency to effectively reach target populations.

Overview: The Community Needs Assessment Report

The full CNA Report provides a detailed profile of the SGI service area. The main objective is to examine the most recent data and information to ensure that SGI Job Training and Education programs are best meeting the needs of the region's diverse low-income communities for a supported path to employment.

This report contains four sections:

- 1** The most recent data from the Census Bureau was used to report on demographic trends;
- 2** A qualitative participant analysis was conducted to seek expertise from students, community partners, and employers;
- 3** Local community needs assessments, strategic plans, and reports from various government and nonprofit organizations were reviewed to identify community needs and to provide context to the quantitative data presented;
- 4** And lastly, labor market information was examined, for both the overall service area and each county, to determine high demand occupations and potential areas for sector training.

The CNA seeks to serve as a valuable guide to SGI, and the community at large, to better understand and meet the needs of the region, as it strives towards an inclusive economy that supports economic self-sufficiency for all.