



Goodwill Industries of Middle Tennessee

A N E C O N O M I C A S S E S S M E N T



**MIDDLE
TENNESSEE**
STATE UNIVERSITY

prepared by **Dr. Murat Arik, Director**
JONES COLLEGE OF BUSINESS
Business and Economic Research Center

Acknowledgement and Study Contributors

This is a study analyzing Goodwill Industries of Middle Tennessee's economic impact to the regional economy. I would like to thank Goodwill Industries of Middle Tennessee (in particular, Karl Houston, senior director of marketing and community relations, and Niketa Hailey-Hill, Marketing Manager). Furthermore, many individuals from Goodwill Industries spent their precious time gathering the necessary data to complete this project. I thank them for their efforts and contributions to this project. Special thanks go to the following individuals for making a real difference in the project: BERC's Sally Govan (senior editor) and undergraduate research associates Allison Logan (project coordinator) and Katherine Stubblefield.

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"Goodwill believes that **paid, productive work** is integral to the **positive self-esteem** of individuals and to the **success of the communities** in which those individuals live."

Paid: Total wage and salary impact was over \$276 million.



Productive: Over 17,000 trainings were received, making productive workers.

Positive Self-Esteem: 88% of employees were mission related.



1,834 employees with barriers were given independence through the power of work.

Success of Communities



\$475 million in business revenues were generated.



Over \$21 million in state and local taxes were produced.



28 million pounds of salvage and recyclable material were diverted from landfills.

Individuals:

Over



Served



Placed



Employed

Glossary of terms	
Regional economy	The regional economy is defined as the 48 county territory that makes up Goodwill Industries of Middle Tennessee.
Net new	Net economic activity refers to an economic activity that would not have happened if Goodwill Industries was not operating.
Donated goods	Donated goods consists of the following major segments associated with the donation process: warehousing, salvage, processing, and transportation.
Supporting services	The Supporting Services sector encompasses housing, occupancy, management, and general occupations.
Direct impact	Changes in economic activity during first round spending.
Indirect impact	Changes in sales, income, or employment within the region in backward linked industries supplying goods and services to Goodwill Industries.
Induced impact	Increases in sales within the region from spending earned as a result of Goodwill Industries (e.g., employment, job placement, etc.). For example, employees working at a Donation Express Center spend their earnings on goods and services in the regional economy. This spending generates business revenues, employment, and wages and salaries throughout the study area.
Total effect	Sum of direct, indirect, and induced impacts.
IMPLAN model	An input-output modeling system. IMPLAN includes procedures for generating multipliers and estimating impacts by applying final demand changes to the model.
Disposable Income	The amount of money that households have available for spending and saving after income taxes have been accounted for.

Executive Summary

The Business and Economic Research Center (BERC), Middle Tennessee State University, under the sponsorship of Goodwill Industries of Middle Tennessee, has produced this assessment of the organization's contribution to the regional economy. Study findings show that Goodwill Industries of Middle Tennessee has greatly impacted individuals, communities, and businesses in the region.

Key Findings:

I. Profile of Goodwill Industries

- Goodwill Industries of Middle Tennessee in 2014
 - employed 2,076 people, a 149 percent increase from 2006 and
 - had 150 establishments, an 81 percent increase from 2005.
- Over 10,000 Career Solutions clients were placed in jobs. Ninety percent of these placements were outside Goodwill, a historical high for Goodwill Industries of Middle Tennessee.
- Since 2005, donations have increased 95 percent. A record-breaking 1.5 million items were donated in 2014.

II. 2014 Economic Impact of Goodwill Industries¹

- Goodwill Industries of Middle Tennessee spent \$77 million dollars in the regional economy.
 - Total impact generated with this spending is estimated around \$165 million.

¹ All impact assessments include the impact of 9,263 placements

- The economic impact of *direct* business revenues of \$214 million associated with Goodwill Industries (including the direct impact of placements) accounts for \$476 million in business revenue in the regional economy.
- Through job placement services, capital projects, and operations, Goodwill Industries of Middle Tennessee is directly responsible for the employment of 11,397 individuals creating a total of 13,392 jobs through a multiplier effect.
 - For every 100 jobs Goodwill is directly responsible for, an additional 18 jobs are created in the regional economy.
- Goodwill's operations, including the placement of 9,263 people in jobs, are directly responsible for \$184 million in wages and salaries generating an economic impact of \$277 million across the study-area.
 - For every dollar of wages and salaries paid as a direct result of Goodwill Industries, an additional \$.50 of wages and salaries is created in the local economy.
- Goodwill Industries created total annual state and local tax revenues of \$21.2 million.
- Every dollar spent by Goodwill Industries of Middle Tennessee creates an additional \$3.30 of benefit to the local economy (including job placements through Career Solutions).

III. Future Impact of Goodwill Industries in 2024²

- By 2024, the economic impact of direct spending associated with operations, including the impact of placements, is projected to account for \$701 million in business revenue.
- Employment due to job placements, capital projects, and operations is projected to increase 66 percent, making Goodwill directly responsible for the employment of nearly 19,000 people; the efforts of Goodwill Industries of Middle Tennessee are expected to have a total employment impact of 21,659.
- Future wages and salaries directly generated by the employment of placements, capital projects workers, and operation employees are expected to reach \$184 million creating a total wage and salary impact of more than \$419 million.
- Annual state and local tax revenues are forecast to rise nearly \$8 million, creating a total impact of \$29 million.

In conclusion, Goodwill Industries of Middle Tennessee is a strong, diverse, and vibrant organization within the middle and west Tennessee regions. Its major impact on individuals, communities, and businesses play a vital role in making it a focal point in the area's strong economic picture.

² All impact assessments include the impact of 15,407 placements.

I. Introduction

Goodwill Industries is an important part of the regional economy as evidenced by its impact on the region. The mission of Goodwill Industries of Middle Tennessee is: “We sell donated goods to provide employment and training opportunities for people who have disabilities and others who have trouble finding and keeping jobs.” This study will show that the impact of Goodwill goes beyond helping individuals, affecting communities and regional businesses, thus strengthening the economy. The Business and Economic Research Center (BERC), Middle Tennessee State University, under the sponsorship of Goodwill Industries of Middle Tennessee has produced this assessment of the organization’s impact on the regional economy.

The purpose of this study is to find answers to the following questions:

- i. What is the scope and size of Goodwill Industries of Middle Tennessee?
- ii. How has Goodwill Industries of Middle Tennessee evolved over the years?
- iii. What is Goodwill Industries of Middle Tennessee’s economic impact on the individuals, communities, and businesses of the region?
- iv. What is the projected impact of Goodwill in the next 10 years?

To answer these questions, BERC designed a conceptual framework using literature resources as well as obtaining data from Goodwill Industries and various other sources. Study findings demonstrate a considerable impact on the regional economy from the activities of Goodwill Industries.

The rest of this report will proceed as follows. The second chapter reviews selected literature and methodological issues. The third chapter presents a summary of the characteristics of Goodwill

Industries of Middle Tennessee. The fourth chapter provides a comprehensive assessment of its economic impact. The fifth chapter gives the projected impact of Goodwill Industries in the next 10 years. A conclusion and appendix follow.

II. Study Goals and Methodology

How did BERC analyze the impact Goodwill Industries on the local economy? In this chapter, we briefly address the question by reviewing literature, identifying the geographic areas of influence, and developing a conceptual framework for data analysis.

II.1. Literature Review

In recent years, several Goodwill regions have invested in research regarding the economic and financial impact their company has had on the community and the state. In this research, it is evident that Goodwill Industries is positively impacting communities nationwide.

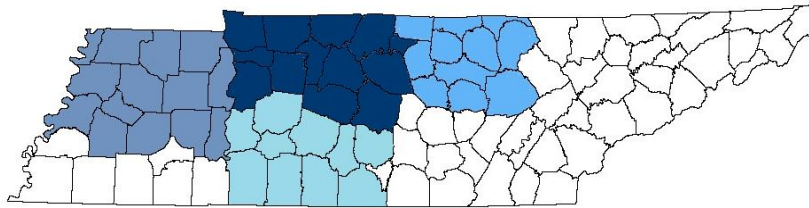
According to Goodwill International, nearly 262,000 people found jobs with Goodwill's help in 2013. That same year, 9.8 million people utilized Goodwill's career and financial programs. The total revenue generated by Goodwill organizations was \$5.17 billion. In California, according to a report done by Elliot D. Pollack and Co., Goodwill generated a total of 11,124 jobs with total wages of \$119.1 million and a total economic impact of \$289.3 million. This enhanced the state's economy and "the fiscal impact generated by the placements was \$9.8 million for the State of California." In fact, Goodwill Industries represented 2.3 percent of California's statewide 2013 job growth. Goodwill also provides job training, which allows the economy to continue to grow and develop as employees are better prepared to enter the workforce. Another report, provided by the Virginia Goodwill Network, shows they contributed nearly a half-billion dollars in economic and fiscal benefits to the state in 2013. It was also determined that "Goodwill engineered job placements in 2013," representing "21 percent of statewide employment growth —more than 8,400 of the 39,781 new jobs that the Bureau of Labor Statistics says were created in Virginia."

Similar findings can be found in Tulsa, where Goodwill Industries of Tulsa produced \$3.1 million in fiscal impact alone and a total economic impact of \$93.8 million across all of its programs.

These reports show how Goodwill regions across the country are making significant impacts on their state and local economies as well as providing a large amount of the job growth seen in recent years³. Goodwill Industries of Middle Tennessee follows this pattern, as we present in this report.

II.2. Geography and Scope of Goodwill Industries of Middle Tennessee

Goodwill Industries of Middle Tennessee covers 48 counties (listed in the appendix) throughout middle and west Tennessee. These counties collectively contain 35 retail stores, 30 Career Solutions centers, and 85 Donation Express Centers.



How does this study include all 48 counties?

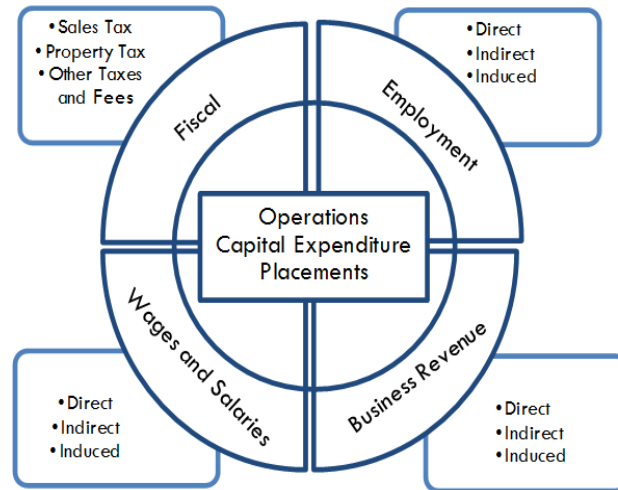
Although Goodwill does not have operations in every county, it makes job placements in every county. Despite the lack of revenues and expenditures in these counties, the economic impact can be analyzed by looking at the impact of the wages and salaries of placements. These wages impact the regional economy through taxes, business revenues, and job creation. County-level impact analysis can be seen in the appendix.

³ Goodwill Industries of Middle Tennessee's impacts are considered significant due to their level of employment and the number of previously unemployable individuals they have placed in jobs.

II.3. Economic Impact Definition and IMPLAN Software.

What is the concept of economic impact, and how do we estimate it? Economic impact refers to economic activities that are net new to the local economy. Such activities include exporting of goods and services by local businesses to areas outside of the region, out-of-area visitor spending, and recapturing of economic activities sent outside the region due to lack of local business services. In the case of Goodwill, the framework for estimating impact is illustrated in the diagram to the right. This study quantifies the amount of impact in these categories using the IMPLAN model.

Identifying the Impact of Goodwill Industries of Middle Tennessee



IMPLAN Model. To estimate the future impact expected from Goodwill Industries of Middle Tennessee, BERCC uses the IMPLAN model developed for the 48 counties encompassing the Goodwill Industries of Middle Tennessee region. IMPLAN is a nationally recognized, commonly used input-output model to measure the economic and fiscal effects of economic development projects.

II.4. Data and Data Sources

Where did the data originate? All data collected for this study was provided by Goodwill Industries of Middle Tennessee and its various publications. Additional demographical data at the

county level came from the Bureau of Economic Analysis (www.bea.gov), the Census Bureau (www.census.gov), and the Bureau of Labor Statistics (www.bls.gov).

Data identification and extraction process. BEREC created several databases used in this study. At the county and regional level, establishment, employment, revenue, expenditure, donation, and placement information was collected.

III. Characteristics of Goodwill Industries of Middle Tennessee

Goodwill Industries of Middle Tennessee is a diverse organization creating impacts in a multitude of areas: employment, revenue, expenditures, career solutions, and donations. This chapter explores the dynamics of Goodwill Industries of Middle Tennessee.

III.1. Size, scope, and change by segment

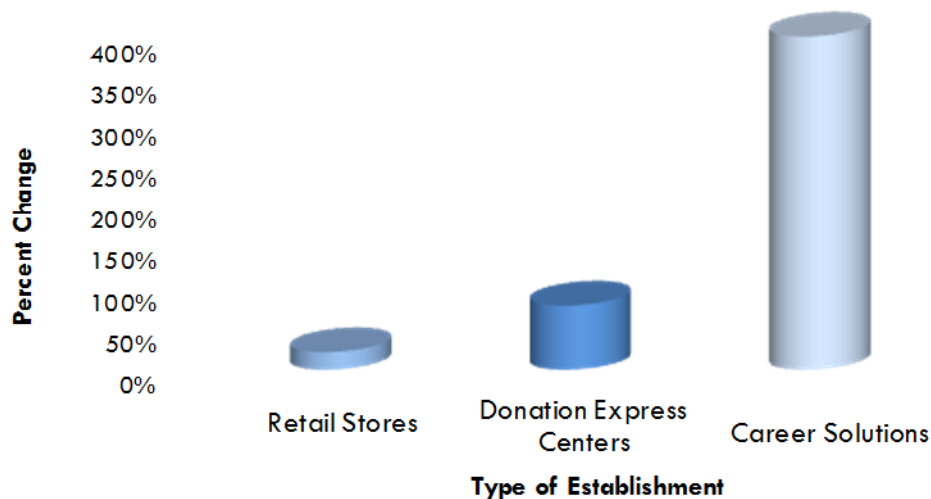
Number of establishments. Over the past 10 years, the number of establishments has grown tremendously. In 2014, there were a total of 150 establishments including Career Solutions Centers, retail stores, and Donation Express Centers. Donation Express Centers accounted for 57 percent of total establishments with 85 locations. There were considerably fewer retail stores and Career Solutions Centers, which held a 23 percent and 20 percent share of establishments, respectively.

Goodwill Industries of Middle Tennessee
Establishments by Type (% in 2015)



Since 2005, the number of establishments has grown 81 percent adding 67 new establishments in the past 10 years. Career Solutions Centers have shown the greatest amount of growth adding 24 new centers, a 400 percent increase. Donation express centers also experienced a period of strong growth with an increase of nearly 77 percent.

Change in the Number of Goodwill Establishments by Type: 2005 to 2015



Goodwill revenues. What is the size of Goodwill Industries of Middle Tennessee? In order to calculate this figure, revenue data was collected from all sectors of Goodwill Industries: Career Solutions, donated goods, retail stores, and supporting services.

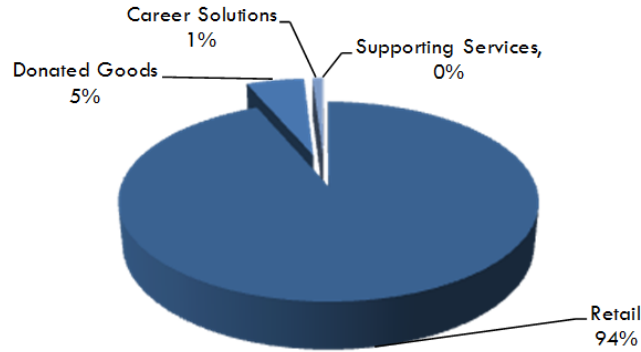
In 2014, total reported revenue was \$77.1 million. Goodwill Industries experienced significant revenue growth between 2005 and 2014, with a total increase of \$49.7 million, or 181 percent averaging 12 percent growth per year.

Goodwill Industries of Middle Tennessee experienced significant revenue growth between 2005 and 2014:

Up 181%

How is this revenue distributed across the different sectors? The chart below summarizes the breakdown of revenues by sector. The retail sector accounts for the majority of revenues (94 percent). Other areas of revenue include donated goods (5 percent), Career Solutions (1 percent), and supporting services (.01 percent).

Goodwill Industries of Middle Tennessee: Revenues in 2014



Goodwill Industries of Middle Tennessee, Change in Revenue and Percent Change by Sector (2005-2014)

Sector	Change (\$)	% Change
Supporting Services	\$8,040	14.84%
Career Solutions	\$427,083	153.06%
Retail	\$46,061,310	179.02%
Donated Goods	\$3,339,010	418.34%

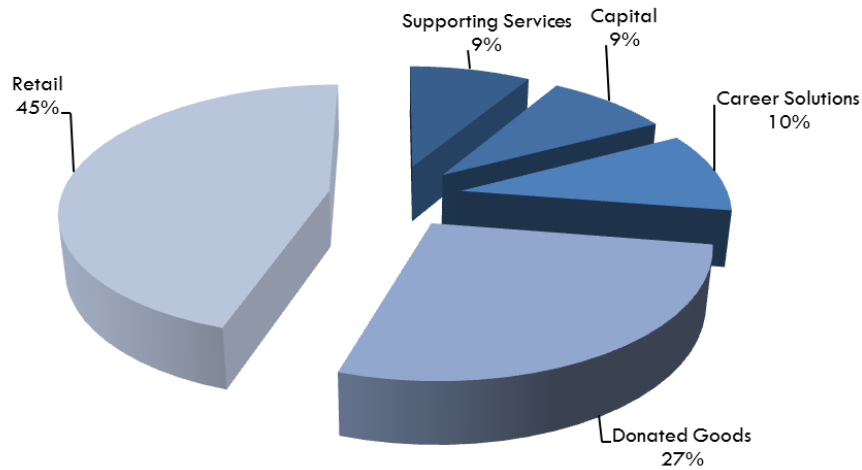
While Goodwill Industries as a whole experienced growth in 2014, not every sector grew. Since 2005, supporting services has experienced a reversal of trends showing large fluctuations. These fluctuations are masked due to the rapid increase in retail revenues.

Goodwill expenditures. A critical factor in this study is how much money Goodwill Industries spent in the regional economy. The amount of money spent is entered as a direct input into the regional IMPLAN model to measure the economic impact. BERG used data provided by Goodwill Industries to analyze total expenditure.

According to Goodwill Industries of Middle Tennessee, total expenditure was \$75.9 million in 2014. Since 2005, expenditures have tripled resulting in an average annual increase of 13%. The largest increase in a single year to date was 2006 when expenditures increased over 25 percent.

How is this expenditure distributed across the major sectors? The chart below summarizes the breakdown of expenditure by sector. The retail sector accounts for nearly half (45 percent) of Goodwill expenditures. Donated goods is the second largest source of expenditures accounting for 27 percent. Following are Career Solutions with 10 percent, capital expenditures with 9 percent, and supporting services with 9 percent.

**Goodwill Industries of Middle Tennessee:
Expenditures in 2014**

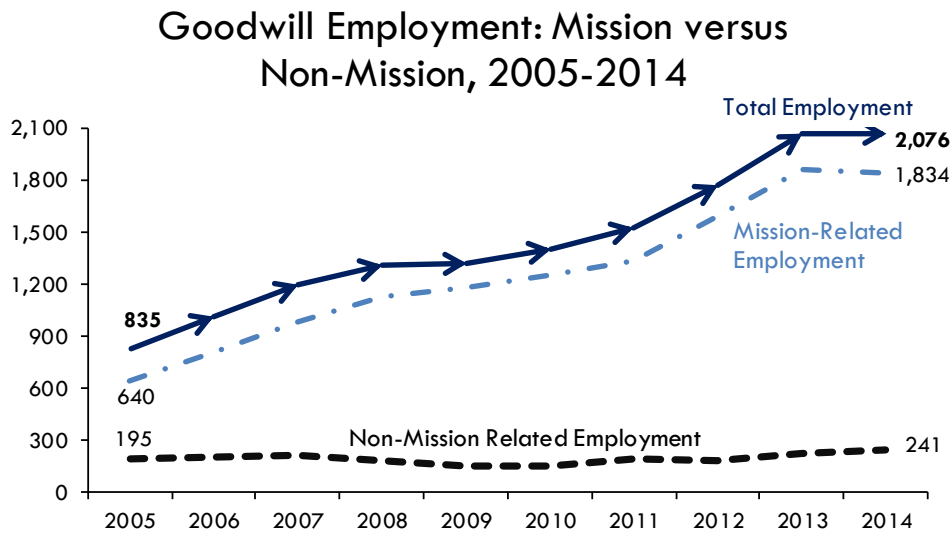


Goodwill Industries of Middle Tennessee, Change in Expenditure and Percent Change (2005-2014)

Sector	Change (\$)	% Change
Supporting Services	\$3,733,395	109%
Retail	\$23,222,260	164%
Donated Goods	\$16,077,665	238%
Career Solutions	\$7,353,512	677%
Capital	\$6,306,958	687%

What portion of wages are mission-related? In 2014, 74 percent of wages were mission-related. Since 2005, mission-related wages have risen 21 percent. Mission-related wages have consistently accounted for 74 to 75 percent of wages since 2010. This is proof that Goodwill is achieving its mission and actively working to impact more lives than ever before.

Goodwill employment. *How many people are employed by Goodwill Industries?* In 2014, Goodwill Industries of Middle Tennessee employed 2,076 people. Of these employees, 88 percent were mission-related. The charts below highlight the increase in mission and non-mission employment.



Goodwill Industries of Middle Tennessee, Change in Mission and Non-Mission Employment: 2005 to 2014

Employment	Change	% Change
Non-Mission	46	24%
Mission	1,194	187%
Total	1,241	149%

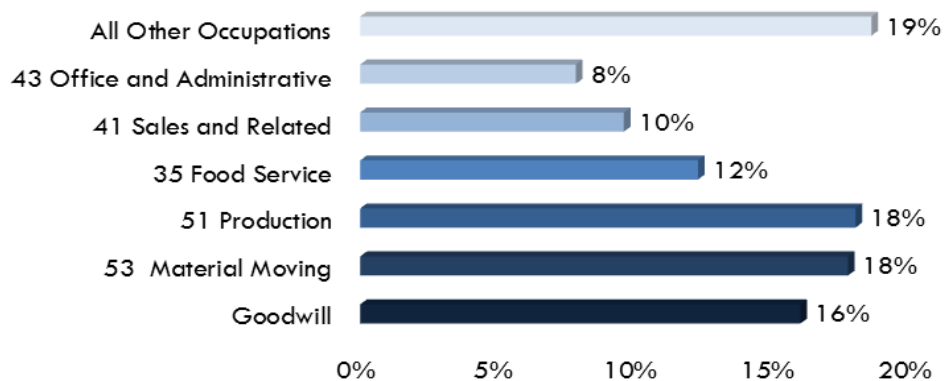
Throughout the past 10 years, Goodwill has increased its mission-related employment 187 percent, adding nearly 1,200 jobs. Non-mission employment has increased 24 percent, adding approximately 50 jobs. From 2005 to 2014, for every 100 Goodwill jobs created, 96 were

mission related. The importance of the increasing number of mission-related employees is that these employees likely would not have found a job elsewhere.

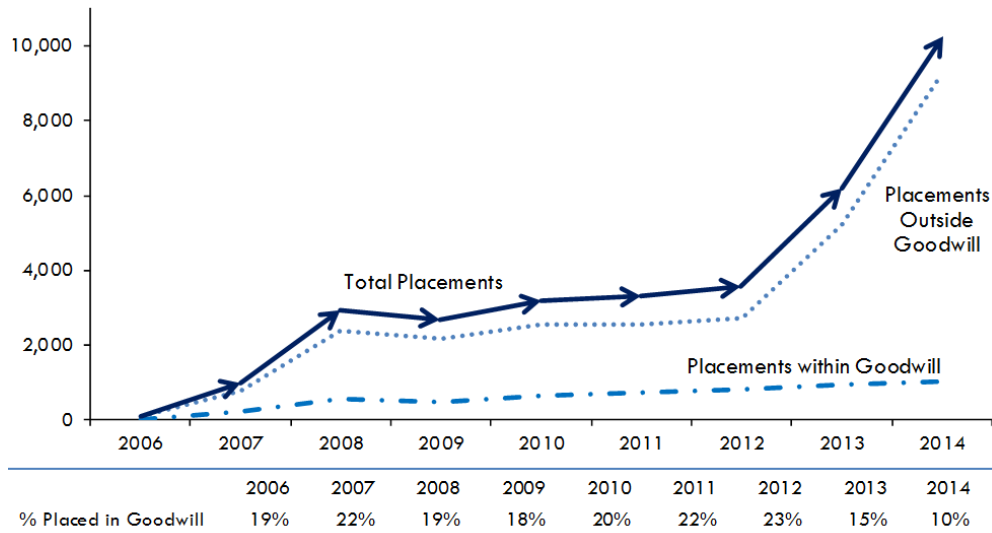
These employees are split among 21 counties within the Goodwill Industries of Middle Tennessee region. Employees work in a variety of locations: retail stores, Donation Express Centers, Career Solutions Centers, and headquarters. Historically, nearly half of employees work in Davidson County because of its many Goodwill locations. Rutherford and Williamson counties also make up a large portion of regional Goodwill employment with over 100 employees in each.

Career Solutions Placements. Placements made by Career Solutions are the focal point of Goodwill Industries as a whole. Placements are made in nearly every county within the region and in a few special cases outside the region. Since 2006, Career Solutions has placed more than 33,000 clients. These placements were made in every occupational group ranging from warehouse worker to tax preparer.

Career Solutions Placements by Occupation: 2006-2014



Placements Inside and Outside of Goodwill Industries: 2006 to 2014



Of the clients placed, 84 percent were placed outside of Goodwill. In 2014, clients placed at Goodwill Industries were at a historical low of 10 percent of total clients placed. Displayed in the graph below, placements have risen consistently, especially between 2012 and 2014, where the number of placements grew 190%. This increase is possible because of Goodwill’s many partnerships from countless companies that believe in its mission as well as increased marketing efforts put forth since 2012.

The table below outlines the top ten outside employers of Career Solutions clients. The number placed in these companies shown is the historical total from 2006 to 2014. Since 2006, 37 companies have hired more than 100 clients. These partnerships with outside corporations allow Goodwill to continue its mission of providing employment to those with barriers. It is with the support of these companies that Goodwill Industries of Middle Tennessee can make such a significant impact.

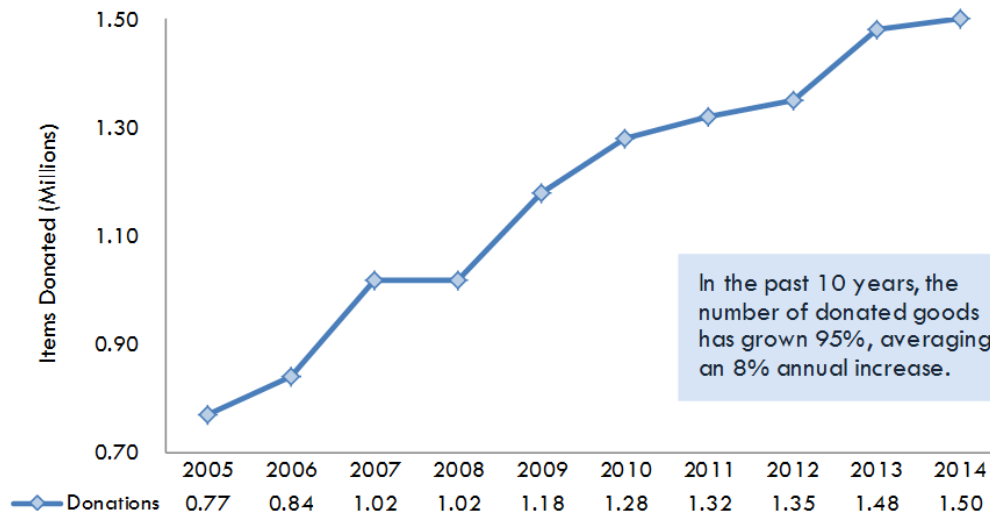
Historical Top Employers: 2006-2014

Rank	Company	Placed Clients
1	Tyson Foods	643
2	Ranstad	621
3	Walmart	574
4	Express Employment Professionals	506
5	Macy's Logistics	468
6	Amazon	397
7	Hamilton Ryker	333
8	McDonald's	326
9	All Star Personnel	286
10	Wise Staffing	278

What is the significance of Career Solutions Placements? Career Solutions allows Goodwill to have an impact on areas without any Goodwill locations. Clients from counties without a Goodwill presence can travel to nearby counties and use the Career Solutions services offered such as training and job placement assistance. This furthers Goodwill’s impact and helps communities that are too small to support locations on their own.

Donations. Donations allow Goodwill to operate and benefit the region. The past 10 years have shown an increase in goods donated to the organization enabling it to expand and grow in other areas. Donations have increased 95 percent since 2005.

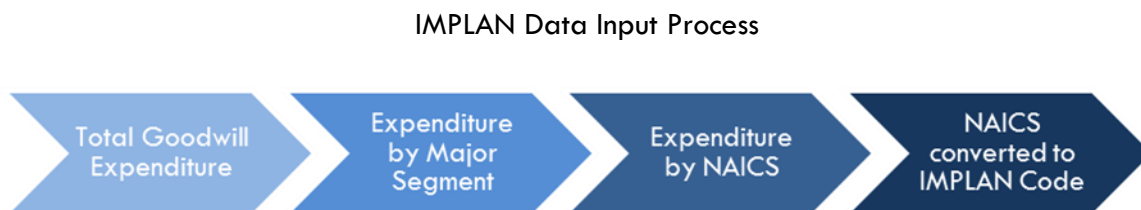
Donations To Goodwill: 2005 to 2014



This period coincides with a large increase in the number of donation sites. Within the past 10 years, 35 new donation express centers have opened. Other factors contributing to the rise in donations include increases in neighborhood, corporate, and university donation drives and estate and corporate pickups. Through these free services, Goodwill is increasing the amount of donations while gaining exposure in the community.

IV. Economic Assessment of Goodwill Industries of Middle Tennessee

As discussed in the previous chapters, Goodwill Industries of Middle Tennessee is a sizeable organization with many areas of influence. In this section, we explore the direct, indirect, and induced effects on the regional economy. For the analysis, we use the IMPLAN model created for the study region with data provided by Goodwill Industries of Middle Tennessee. The process is summarized in the following chart.



What is the meaning of economic impact? Economic impact refers to an economic activity's net new contribution to the region in which the activity takes place. Some examples include a visitor from out of town spending money on a hotel/motel, a new manufacturing plant operating in the region, federal or out-of-region money flowing to an area to support a new program, or an activity that is unique in the region.

How is the direct economic impact figure determined? BEREC used data provided by Goodwill to determine the direct economic impact. In reporting economic impact estimates, we follow the procedure outlined below:

- 1) *Business revenue (output) effect: direct, indirect (the effect of business-to-business interactions), and induced (the effect of employee spending of wages and salaries) by Goodwill Industries. These measures (indirect and induced) are also called the ripple effect. The business revenue effect represents all economic activities (i.e., trades, value added, income,*

taxes, proprietary income, etc.) associated with the activity. Therefore, this figure should not be aggregated with any other measures reported here.

- 2) *Employment effect: direct, indirect and induced by Goodwill Industries*
- 3) *Labor income effect: direct, indirect, and induced by Goodwill Industries*
- 4) *Local and state taxes: total taxes by nonprofit segment.*

In this context, it is also important to remember the major assumptions used for this section:

- 1) The study region is the total area of Goodwill Industries of Middle Tennessee-48 counties in middle and west Tennessee.
- 2) Total wages for the people placed in jobs are estimated at around \$164 million. We assume that 86% of these wages are used as disposable income.

A certain degree of discrepancy may exist in the data files in terms of establishments, revenue, expenditure, employment, and placement, resulting from (a) the use of multiple databases, and (b) several levels of aggregation.

IV.1 Economic Impact by Segment

Business Revenue. The total economic impact of Goodwill Industries of Middle Tennessee in terms of business revenue is \$475 million. Which segment's impact is the largest? The placements segment accounts for the largest amount of business revenues with more than 9,000 individuals stimulating business. Total business revenues associated with placements is nearly \$298 million. For every direct dollar generated by businesses, \$1.23 was created in the regional economy.

Economic Impact of Goodwill Industries in the Regional Economy

Business Revenue

Segment	Direct	Indirect & Induced	Total
Operations	\$77,073,973	\$87,938,747	\$165,012,720
Capital Expenditures	\$7,225,531	\$5,972,901	\$13,198,432
Placements	\$129,206,929	\$168,342,776	\$297,549,705
Total Effect	\$213,506,433	\$262,254,424	\$475,760,857

Source: BERC estimates from IMPLAN regional model

Employment. What is the net employment impact of the nonprofit sector on the regional economy?

The table below highlights the economic impact estimates by segment. In all, Goodwill's efforts produced 13,392 jobs in 2014. For every 100 direct jobs, an additional 18 were created in the regional economy. Placements, responsible for 10,551 jobs⁴ (direct, indirect, and induced) made the largest contribution to employment impact. The operations and capital expenditures segments fall behind with 2,742 and 99 jobs, respectively.

Economic Impact of Goodwill Industries in the Regional Economy

Employment

Segment	Direct	Indirect & Induced	Total
Operations	2,076	666	2,742
Capital Expenditures	58	41	99
Placements	9,263	1,288	10,551
Total Effect	11,397	1,995	13,392

Source: BERC estimates from IMPLAN regional model

Wages and salaries. How much money do people earn because of Goodwill Industries of Middle Tennessee? The following table presents the extent of wage and salary impact of Goodwill on the regional economy. In FY 2014, Goodwill Industries-related economic activities account for \$277 million in wages and salaries. For every dollar of direct wages and salaries, an additional \$.50 of

⁴ In order to avoid double counting this estimate only includes clients placed with outside employers. Placements made to Goodwill Industries are counted as employees in the operations segment.

wages and salaries were created in the regional economy. Three segments account for this impact on wages and salaries: placements with \$189 million, operations with \$83 million, and capital expenditures with \$5 million.

Economic Impact of Goodwill Industries in the Regional Economy

Wages and Salaries

Segment	Direct	Indirect & Induced	Total
Operations	\$52,225,005	\$30,599,318	\$82,824,323
Capital Expenditures	\$2,830,331	\$2,036,467	\$4,866,798
Placements	\$129,206,929	\$59,777,477	\$188,984,406
Total Effect	\$184,262,265	\$92,413,262	\$276,675,527

Source: BERC estimates from IMPLAN regional model

Fiscal impact. How much tax revenue has Goodwill Industries generated in the regional economy?

The table below illustrates the fiscal impact of Goodwill Industries among the three sectors (operations, capital expenditures, and placements) over the three areas of influence (sales tax, property tax, and other taxes and fees). Together, the total fiscal impact of Goodwill Industries was more than \$21 million dollars in 2014. The majority (59 percent) of taxes generated were from sales tax. Operations accounted for 54 percent of total generated taxes, followed by placements (44 percent).

Economic Impact of Goodwill Industries of Middle Tennessee in the Regional Economy

Fiscal Impact

Segment	Sales Tax	Property Tax	Other Taxes & Fees	Total Effect
Operations	\$6,871,776	\$2,963,591	\$1,718,430	\$11,553,797
Capital Expenditures	\$248,349	\$107,608	\$69,505	\$425,462
Placements	\$5,357,338	\$2,309,107	\$1,570,478	\$9,236,923
Total Effect	\$12,477,463	\$5,380,306	\$3,358,413	\$21,216,182

Source: BERC estimates from IMPLAN regional model

IV.2. Economic Impact by Major Industries

Business Revenue. Goodwill's Impact on the community in terms of business revenue is over \$347 million. The largest sectors impacted (outlined in the following table) are retail trade, health and social services, and real estate and rental⁵. These three industries receive 49 percent of the business revenues produced by Goodwill Industries.

2014 Economic Impact by Major Sector*		Business Revenue			
Sector	Description	Direct	Indirect	Induced	Total
0	Total	\$84,299,504	\$36,714,994	\$225,539,429	\$346,553,927
20	44-45 Retail trade	\$44,516,674	\$613,928	\$20,950,750	\$66,081,352
41	62 Health and Social Services	\$9,587,075	\$724	\$40,553,799	\$50,141,598
52	53 Real Estate and Rental	\$0	\$6,894,362	\$44,302,315	\$51,196,677
65	56 Administrative and Waste Services	\$14,588,581	\$3,305,055	\$6,587,155	\$24,480,791
395	52 Finance and Insurance	\$0	\$4,195,568	\$19,354,656	\$23,550,224
396	81 Other Services	\$3,793,257	\$880,796	\$11,049,914	\$15,723,967
408	48-49 Transportation & Warehousing	\$4,588,142	\$3,721,333	\$5,572,431	\$13,881,906
417	92 Government and Non-NAICs	\$0	\$2,505,200	\$11,952,937	\$14,458,137
433	51 Information	\$0	\$2,866,723	\$10,868,716	\$13,735,439
440	42 Wholesale Trade	\$0	\$1,854,836	\$10,671,875	\$12,526,711
447	72 Accommodation and Food Services	\$0	\$788,194	\$11,192,759	\$11,980,953
461	31-33 Manufacturing	\$0	\$1,864,798	\$9,884,297	\$11,749,095
462	54 Professional—Scientific and Tech Services	\$0	\$3,694,609	\$7,633,091	\$11,327,700
472	23 Construction	\$7,225,531	\$711,443	\$3,360,181	\$11,297,155
475	55 Management of Companies	\$0	\$1,768,205	\$2,124,863	\$3,893,068
488	61 Educational Services	\$0	\$137,340	\$3,268,880	\$3,406,220
499	71 Arts—Entertainment and Recreation	\$0	\$290,634	\$3,027,300	\$3,317,934
504	22 Utilities	\$0	\$519,519	\$2,440,182	\$2,959,701
1	11 Agriculture, Forestry, Fish and Hunting	\$0	\$51,405	\$531,201	\$582,606
518	21 Mining	\$0	\$50,322	\$212,126	\$262,448

*Business revenue by sector does not include total direct revenues associated with the placement of 9,263 people in 2014.

⁵ For more information on NAICS codes and their breakdown, see www.census.gov/eos/www/naics.

Employment. Goodwill Industries of Middle Tennessee created an employment impact of 4,129 jobs. Sectors seeing the most job generation are retail trade (receiving 39 percent of employment), administrative and waste services (receiving 14 percent of employment), and health and social services (receiving 14 percent of employment). Employment impacts range from 1 job in mining to 1,625 in retail.

2014 Economic Impact by Major Sector*		Employment			
Sector	Description	Direct	Indirect	Induced	Total
0	Total	2,134	264	1,731	4,129
20	44-45 Retail Trade	1,350	8	267	1,625
41	56 Administrative and Waste Services	413	57	105	575
52	62 Health and Social Services	195	0	370	565
65	81 Other Services	60	10	189	258
395	72 Accommodation and Food Services	0	15	198	213
396	53 Real Estate and Rental	0	40	126	165
408	52 Finance and Insurance	0	25	111	135
417	48-49 Transportation and Warehousing	58	31	38	127
433	54 Professional—Scientific and Tech Services	0	27	60	87
440	23 Construction	58	4	20	82
447	42 Wholesale Trade	0	8	48	57
461	61 Educational Services	0	2	50	52
462	71 Arts—Entertainment and Recreation	0	4	44	48
472	92 Government and Non-NAICs	0	8	33	42
475	51 Information	0	10	29	39
488	31-33 Manufacturing	0	7	19	26
499	55 Management of Companies	0	8	9	17
1	11 Agriculture, Forestry, Fish and Hunting	0	1	12	13
504	22 Utilities	0	0	2	2
518	21 Mining	0	0	1	1

*Employment by sector does not include total direct placement of 9,263 people in 2014.

Wages and Salaries. The economic impact from wages and salaries totaled \$147 million in 2014.

Retail trade, health and social services, and administrative and waste services saw the highest impact. Sixty percent, or \$88 million, of direct, indirect, and induced wages were from these three sectors.

2014 Economic Impact by Major Sector*		Wages and Salaries			
Sector	Description	Direct	Indirect	Induced	Total
0	Total	\$55,055,336	\$12,350,903	\$80,062,360	\$147,468,598
20	44-45 Retail trade	\$29,476,014	\$220,100	\$8,766,317	\$38,462,430
41	62 Health and Social Services	\$5,469,796	\$422	\$26,993,949	\$32,464,168
52	56 Administrative and Waste Services	\$11,447,756	\$1,894,869	\$3,497,201	\$16,839,826
65	81 Other Services	\$3,299,975	\$517,290	\$6,397,394	\$10,214,660
395	52 Finance and Insurance	\$0	\$1,452,728	\$6,438,874	\$7,891,601
396	48-49 Transportation & Warehousing	\$2,531,464	\$1,533,462	\$2,013,633	\$6,078,559
408	54 Professional—Scientific and Tech Services	\$0	\$1,876,784	\$3,869,282	\$5,746,066
417	72 Accommodation and Food Services	\$0	\$322,520	\$4,487,998	\$4,810,517
433	23 Construction	\$2,830,331	\$268,809	\$1,231,580	\$4,330,720
440	42 Wholesale Trade	\$0	\$607,637	\$3,496,066	\$4,103,703
447	53 Real Estate and Rental	\$0	\$844,733	\$2,782,461	\$3,627,194
461	92 Government and Non-NAICs	\$0	\$721,590	\$2,850,939	\$3,572,529
462	51 Information	\$0	\$606,191	\$1,779,269	\$2,385,460
472	61 Educational Services	\$0	\$75,614	\$1,805,184	\$1,880,798
475	55 Management of Companies	\$0	\$847,120	\$1,017,990	\$1,865,110
488	31-33 Manufacturing	\$0	\$375,013	\$1,131,768	\$1,506,780
499	71 Arts—Entertainment and Recreation	\$0	\$126,463	\$1,189,523	\$1,315,986
504	22 Utilities	\$0	\$39,346	\$196,669	\$236,014
1	11 Agriculture, Forestry, Fish and Hunting	\$0	\$11,147	\$76,716	\$87,863
518	21 Mining	\$0	\$9,066	\$39,549	\$48,615

*Wages and salaries by sector does not include total direct wages and salaries associated with the placement of 9,263 people in 2014.

To conclude, the economic impact of Goodwill Industries is significant, accounting for more than 4,000 jobs, \$347 million in business revenues, and \$147 million in wages and salaries. In the next section, this study uses Goodwill's and the region's current and past performance to draw conclusions about the future impact of Goodwill Industries of Middle Tennessee.

V. Projected Impact of Goodwill Industries of Middle Tennessee

The past 10 years have shown tremendous growth for Goodwill Industries of Middle Tennessee. Notable accomplishments include placing over 33,000 clients in jobs, helping the economy through nearly half a billion dollars in expenditures, collecting 12.5 million donations, and adding over 1,000 new employees.

The time between 2012 and 2014 showed large increases in nearly every area of Goodwill Industries. BERC's projections in estimating the future impact of Goodwill Industries takes this fact into account. This chapter uncovers the future projected impact of Goodwill Industries in 2024 at the regional level.

V.1 Method of Forecasting

An analysis of historical indicators shows that Goodwill's operation has grown dramatically over the years across the major indicators. Although there seems to be some cyclical elements in employment and capital expenditure growths (every five years in case of employment and three years in capital expenditure), a linear trend equation best fits to the data. BERC included only historical data and 2024 values of each indicator. In estimating economic impact of Goodwill in 2024, the forecasted values will be used.

V.2 Future Projected Impact

Total. As indicated in the table below, Goodwill is projected to have a greater impact on the community and lives of individuals than ever before. The greatest increases that will be seen in 2024 are in employment and wages and salaries. Employment is expected to grow 62 percent, bringing total employment as a result of Goodwill Industries to nearly 22,000. A 52 percent

increase in wages and salaries is expected, bringing the total impact to \$419 million.

Considerable increases are also expected in business revenue (47 percent) and fiscal impact (38 percent).

Goodwill Industries Projected Impact: Total		
	2014	2024
Business Revenue (Total)	\$475,760,857	\$717,441,756
<i>Direct</i>	\$213,506,433	\$352,106,647
<i>Indirect & Induced</i>	\$262,254,424	\$365,335,109
Employment (Total)	13,392	21,659
<i>Direct</i>	11,397	18,882
<i>Indirect & Induced</i>	1,995	2,777
Wages & Salaries (Total)	\$276,675,527	\$419,051,380
<i>Direct</i>	\$184,262,265	\$290,338,728
<i>Indirect & Induced</i>	\$92,413,262	\$128,712,652
Fiscal (Total)	\$21,216,182	\$29,190,973
<i>Sales Tax</i>	\$12,477,463	\$17,155,704
<i>Property Tax</i>	\$5,380,306	\$7,397,990
<i>Other Taxes and Fees</i>	\$3,358,413	\$4,637,279

Business Revenue. In 2024, it is estimated that 61 percent of business revenue will be due to placements. Operations are expected to continue the current growth trend, rising 50 percent in the next 10 years accounting for 35 percent of total business revenues.

Goodwill Industries Projected Impact

Business Revenue

Segment	Direct		Indirect & Induced		Total	
	2014	2024	2014	2024	2014	2024
Operations	\$77,073,973	\$123,964,353	\$87,938,747	\$122,851,891	\$165,012,720	\$246,816,244
Capital	\$7,225,531	\$13,409,845	\$5,972,901	\$11,277,880	\$13,198,432	\$24,687,725
Placements	\$129,206,929	\$214,732,449	\$168,342,776	\$231,205,338	\$297,549,705	\$445,937,787
Total Effect	\$213,506,433	\$352,106,647	\$262,254,424	\$365,335,109	\$475,760,857	\$717,441,756

Employment. In the next 10 years, Goodwill's employment impact is expected to be 21,659, a 62 percent increase from 2014. Placements are expected to account for 79 percent of the total

employment generated by Goodwill Industries of Middle Tennessee. The remaining 21 percent of employment is an effect of operations (20 percent) and capital expenditures (1 percent).

Goodwill Industries Projected Impact
Employment

Segment	Direct		Indirect & Induced		Total	
	2014	2024	2014	2024	2014	2024
Operations	2,076	3,339	666	928	2,742	4,267
Capital	58	136	41	77	99	213
Placements	9,263	15,407	1,288	1,772	10,551	17,179
Total Effect	11,397	18,882	1,995	2,777	13,392	21,659

Wages and Salaries. The total impact of Goodwill Industries on wages and salaries is projected to be \$419 million by 2024. Placements are the main source of direct, indirect, and induced wages and salaries. Over the next 10 years, it is estimated that the amount of wages from placements will increase 57 percent. The share in total wages and salaries will increase to 71 percent, a 3 percent increase from 2014. Additionally, wages due to operations are expected to rise 36 percent, holding a 27 percent share of total projected wages and salaries.

Goodwill Industries Projected Impact
Wages and Salaries

Segment	Direct		Indirect & Induced		Total	
	2014	2024	2014	2024	2014	2024
Operations	\$52,225,005	\$70,127,269	\$30,599,318	\$42,659,757	\$82,824,323	\$112,787,026
Capital	\$2,830,331	\$5,479,010	\$2,036,467	\$3,847,848	\$4,866,798	\$9,326,858
Placements	\$129,206,929	\$214,732,449	\$59,777,477	\$82,205,047	\$188,984,406	\$296,937,496
Total Effect	\$184,262,265	\$290,338,728	\$92,413,262	\$128,712,652	\$276,675,527	\$419,051,380

Fiscal Impact. By 2024, the total fiscal impact generated by Goodwill Industries of Middle

Tennessee is projected to be nearly \$46 million. This surpasses the 2014 impact by more than \$12 million, or 38 percent. Segments of impact are expected to hold the same rank in terms of taxes generated. Placements are expected to contribute \$29 million, up 38 percent from 2014. Operations will have the second largest impact accounting for nearly \$16 million of the \$46 million in total fiscal impact.

Goodwill Industries Projected Impact

Fiscal Impact

	Segment	Operations	Capital	Placement	Total Effect
Sales Tax	2014	\$6,871,776	\$248,349	\$5,357,338	\$12,477,463
	2024	\$9,315,762	\$472,615	\$7,367,327	\$17,155,704
Property Tax	2014	\$2,963,591	\$107,608	\$2,309,107	\$5,380,306
	2024	\$4,017,743	\$204,799	\$3,175,448	\$7,397,990
Other Taxes and Fees	2014	\$1,718,430	\$69,505	\$1,570,478	\$3,358,413
	2024	\$2,345,347	\$132,234	\$2,159,698	\$4,637,279
Total	2014	\$11,553,797	\$425,462	\$9,236,923	\$21,216,182
	2024	\$15,678,852	\$809,648	\$12,702,473	\$29,190,973

V.3. Projected Impact by Functional Area

Goodwill's economic impact is expected to come from three functional areas: operations, capital expenditures, and placements. The breakdown of these three areas will be reviewed as well as a comparative picture of the area's performance over the past five years.

The total impact, of all areas combined, is expected to grow comparable to the rate of the past five years. A large majority of the employment impact is expected to be from the placements area, similar to the current trend. Business revenue is expected to grow nearly 47 percent from

2014. The total impact in 2024 is forecasted to be \$701 million. Wage and salary impacts are

Goodwill Service Area Economic Impact Estimates (in 2014 \$)

Goodwill Total Impact					Current Year	Forecast
Impact Category	2010	2011	2012	2013	2014	2024
Employment						
Direct	4,046	4,137	4,576	7,396	11,397	18,882
Indirect & Induced	897	888	1,005	1,483	1,995	2,777
Total	4,943	5,025	5,581	8,879	13,392	21,659
Business Revenue						
Direct	\$93,899,562	\$95,575,017	\$112,049,238	\$158,074,212	\$213,506,433	\$352,106,647
Indirect & Induced	\$118,721,116	\$117,108,320	\$132,889,667	\$195,513,428	\$262,254,424	\$365,632,109
Total	\$212,620,678	\$212,683,337	\$244,938,905	\$353,587,640	\$475,760,857	\$717,738,756
Wages and Salaries						
Direct	\$75,607,078	\$75,390,697	\$85,184,010	\$130,504,611	\$184,262,265	\$290,338,728
Indirect & Induced	\$41,601,116	\$41,054,682	\$46,539,955	\$68,664,115	\$92,413,262	\$128,712,652
Total	\$117,208,195	\$116,445,379	\$131,723,965	\$199,168,726	\$276,675,527	\$419,051,380

expected to reach \$419 million, increasing 50 percent from 2014.

Operations. The operations area encompasses retail stores, donation express centers, and more.

The total employment impact is expected to rise more than 55 percent being responsible for creating 1,525 new jobs in the next 10 years. Other significant impacts include business revenue where operations related business revenue impacts will increase 50 percent from 2014 producing \$247 million dollars in the regional economy. Wages and salaries are expected to increase 36 percent in the next 10 years.

Goodwill Service Area Economic Impact Estimates (in 2014 \$)

Goodwill Operation					Current Year	Forecast
Impact Category	2010	2011	2012	2013	2014	2024
Employment						
Direct	1,399	1,526	1,772	2,066	2,076	3,339
Indirect & Induced	481	516	590	679	666	928
Total	1,880	2,042	2,362	2,745	2,742	4,267
Business Revenue						
Direct	\$50,282,258	\$57,759,961	\$67,285,570	\$73,801,389	\$77,073,973	\$123,964,353
Indirect & Induced	\$63,461,090	\$68,098,191	\$77,789,338	\$89,556,054	\$87,938,747	\$122,851,891
Total	\$113,743,348	\$125,858,152	\$145,074,908	\$163,357,443	\$165,012,720	\$246,816,244
Wages and Salaries						
Direct	\$38,151,441	\$40,773,491	\$46,519,597	\$53,441,057	\$52,225,005	\$70,127,269
Indirect & Induced	\$22,097,039	\$23,712,091	\$27,087,287	\$31,177,390	\$30,599,318	\$42,659,757
Total	\$60,248,481	\$64,485,582	\$73,606,884	\$84,618,447	\$82,824,323	\$112,787,026

Capital expenditure. While capital expenditures make up a small portion of the Goodwill's current and future economic impact, they nonetheless make a difference. Over the past five years, fluctuations have occurred varying the yearly impact. By 2024, capital expenditures are expected to nearly double in every area they have impact. Employment impacts are expected to increase by 114 jobs (115 percent), business revenue impacts will increase nearly \$10 million (87 percent), and wages and salary impacts will increase \$4 million (92 percent).

Goodwill Service Area Economic Impact Estimates (in 2014 \$)

<i>Goodwill Capital Expenditure</i>					Current Year	Forecast
Impact Category	2010	2011	2012	2013	2014	2024
Employment						
Direct	80	40	59	93	58	136
Indirect & Induced	57	29	53	67	41	77
Total	137	69	112	160	99	213
Business Revenue						
Direct	\$10,128,951	\$5,185,117	\$9,682,343	\$11,811,764	\$7,225,531	\$13,409,845
Indirect & Induced	\$8,372,679	\$4,248,880	\$7,825,155	\$9,743,329	\$5,972,901	\$11,277,880
Total	\$18,501,630	\$9,433,997	\$17,507,498	\$21,555,093	\$13,198,432	\$24,687,725
Wages and Salaries						
Direct	\$3,967,284	\$1,987,267	\$3,583,088	\$4,602,495	\$2,830,331	\$5,479,010
Indirect & Induced	\$2,854,670	\$1,448,149	\$2,665,547	\$3,321,714	\$2,036,467	\$3,847,848
Total	\$6,821,954	\$3,435,416	\$6,248,635	\$7,924,209	\$4,866,798	\$9,326,858

Placements. As highlighted by this report, placements are the driving force of Goodwill's economic impact growth. This trend is expected to continue in the future. Total employment impact due to placements is projected to reach just over 17,000 in 2024 making up 80 percent of projected employment from all areas combined. Remarkably, wages and salary and business revenue impacts due to placements are expected to make up 71 percent and 61 percent of their respective totals across all areas. All impact categories are expected to increase at least 50 percent from 2014.

Goodwill Service Area Economic Impact Estimates (in 2014 \$)

Goodwill Placements					Current Year	Forecast
Impact Category	2010	2011	2012	2013	2014	2024
Employment						
Direct (Placements)	2,567	2,571	2,745	5,237	9,263	15,407
Indirect & Induced	359	343	362	737	1,288	1,772
Total	2,926	2,914	3,107	5,974	10,551	17,179
Business Revenue						
Direct	\$33,488,353	\$32,629,939	\$35,081,325	\$72,461,059	\$129,206,929	\$214,732,449
Indirect & Induced	\$46,887,347	\$44,761,249	\$47,275,174	\$96,214,045	\$168,342,776	\$231,502,338
Total	\$80,375,700	\$77,391,188	\$82,356,499	\$168,675,104	\$297,549,705	\$446,234,787
Wages and Salaries						
Direct	\$33,488,353	\$32,629,939	\$35,081,325	\$72,461,059	\$129,206,929	\$214,732,449
Indirect & Induced	\$16,649,407	\$15,894,442	\$16,787,121	\$34,165,011	\$59,777,477	\$82,205,047
Total	\$50,137,760	\$48,524,381	\$51,868,446	\$106,626,070	\$188,984,406	\$296,937,496

VI. Conclusion

What are the major takeaways from this analysis? Here are some critical highlights: Goodwill Industries of Middle Tennessee is an important asset to individuals and the communities in which they live. Economic impact analysis suggests Goodwill has a sizeable impact on the region through increases in employment, wages and salaries, business revenue, and fiscal impact. The Business and Economic Research Center, Middle Tennessee State University, projects these impacts will not only continue in the future but also increase.

This study aims to start a conversation about Goodwill Industries and the true impact of its mission. We hope the findings in this report provide a compelling reason to see Goodwill Industries of Middle Tennessee as more than just a social welfare company—as a diverse nonprofit that makes a considerable impact on the individuals, communities, and businesses of the region.

VII. Works Consulted

- Alliance for Nonprofit Excellence. (2014) *Inside the Mid-South Nonprofit Sector*. Memphis, TN.
- Arik, Murat. (2013) *The Nonprofit Sector in the Nashville MSA*. Murfreesboro, TN.
- Center for Governmental Research. (2006) *The Nonprofit Sector: A Vital Economic Force in the Mid-Hudson Valley*. Rochester, NY.
- Elliott D. Pollack & Company. (2015). *Goodwill Industries Operating in California: Economic and Fiscal Impact 2014*. Scottsdale, AZ.
- Goodwill Industries International Inc. (2014) *GuideStar Exchange Charting Impact Report*. Rockville, MD. BBB Wise Giving Alliance, GuideStar USA, and Independent Sector.
- Goodwill Industries of Middle Tennessee. (2015) *2014 Annual Report*. Nashville, TN.
- Goodwill Industries of Tulsa. (2015) *2014 Annual Report*. Tulsa, OK.
- Virginia Goodwill Network. (2014). *2013-VGN Economic Impact* [Press release].

VIII. Appendix

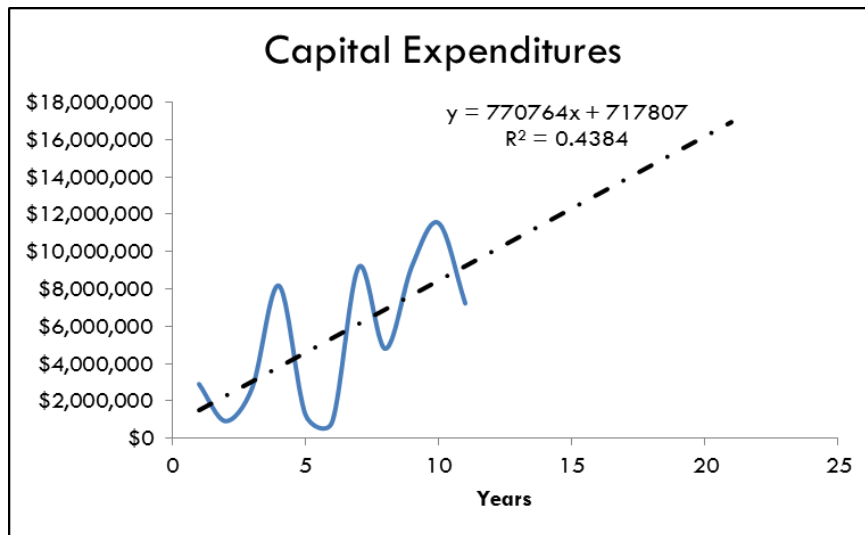
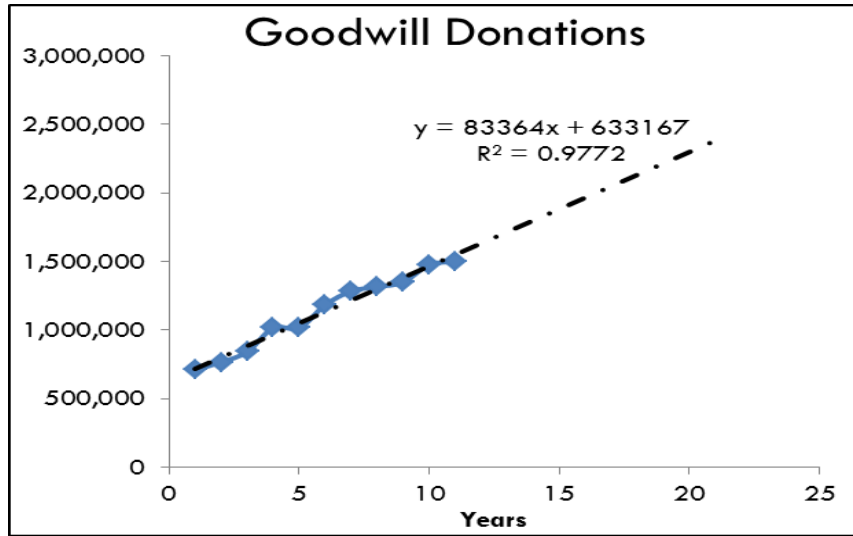
A. Counties effected by Goodwill Industries

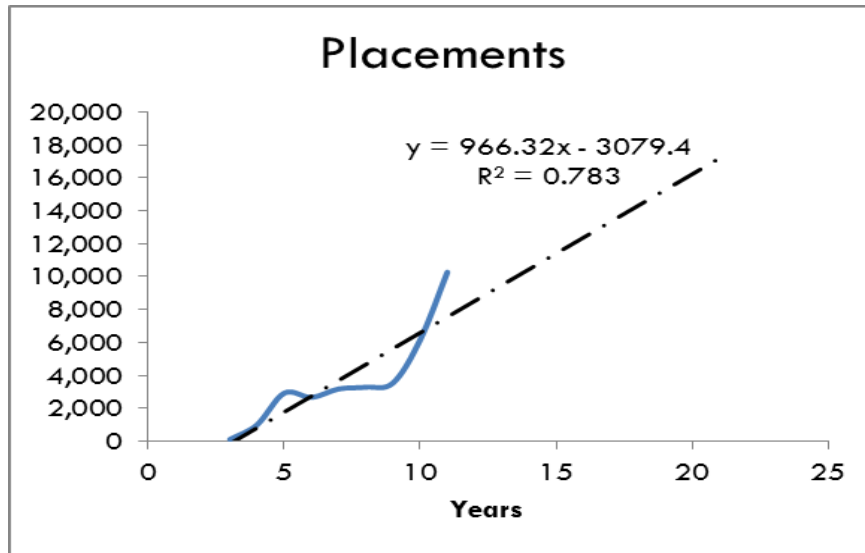
Goodwill Industries of Middle Tennessee's Geographic Area. 48 counties throughout middle and west Tennessee make up the area in which Goodwill Industries of Middle Tennessee has impact: Bedford, Benton, Carroll, Cheatham, Clay, Crockett, Cumberland, Davidson, Decatur, DeKalb, Dickson, Dyer, Fentress, Gibson, Giles, Haywood, Henderson, Henry, Hickman, Houston, Humphreys, Jackson, Lake, Lauderdale, Lawrence, Lewis, Lincoln, Macon, Madison, Marshall, Maury, Montgomery, Obion, Overton, Perry, Pickett, Putnam, Robertson, Rutherford, Smith, Stewart, Sumner, Trousdale, Wayne, Weakley, White, Williamson, and Wilson.

Goodwill Industries Presence outside the Region. In some special cases, placements are made by Goodwill Industries outside of the 48-county region outlined above. Additional counties impacted are as follows: Bledsoe, Blount, Campbell, Cannon, Chester, Coffee, Franklin, Grundy, Hamblen, Hamilton, Hardeman, Hardin, Knox, Marion, McNairy, Monroe, Moore, Morgan, Scott, Sevier, Shelby, Tipton, Van Buren, Warren, and Washington.

B. Additional Forecasting Material

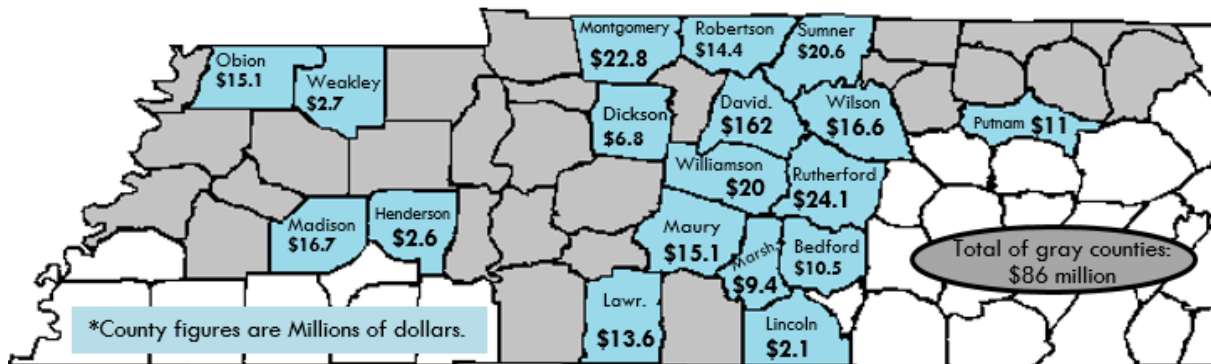
Time	Year	GW Employment	Population	GW Donation	Capital Expenditure	Placements
1	2004	789	1,650,381	710,970	\$2,902,285	
2	2005	835	1,687,524	767,241	\$918,573	
3	2006	1,010	2,604,994	842,667	\$2,704,827	114
4	2007	1,195	2,658,620	1,016,545	\$8,171,332	1,001
5	2008	1,305	2,701,405	1,016,963	\$1,251,282	2,928
6	2009	1,184	2,739,964	1,184,723	\$872,265	2,670
7	2010	1,399	2,770,344	1,284,521	\$9,173,057	3,180
8	2011	1,527	2,796,333	1,316,773	\$4,793,169	3,288
9	2012	1,775	2,833,320	1,349,855	\$9,224,706	3,543
10	2013	2,066	2,864,133	1,478,702	\$11,529,243	6,166
11	2014	2,076	2,905,053	1,497,888	\$7,225,531	10,273
21	2024	3,343	3,278,661	2,383,811	\$16,903,851	17,207





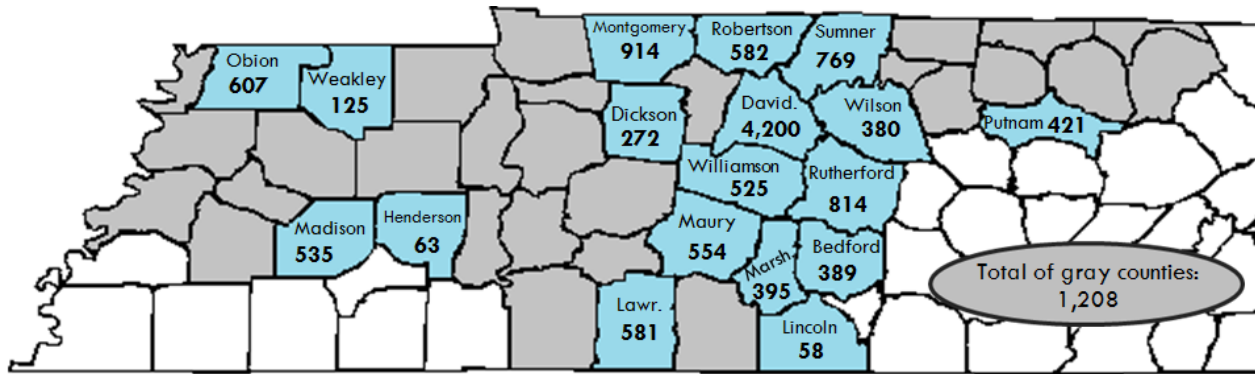
C. Visual Impact of Goodwill Industries of Middle Tennessee

Business Revenue.



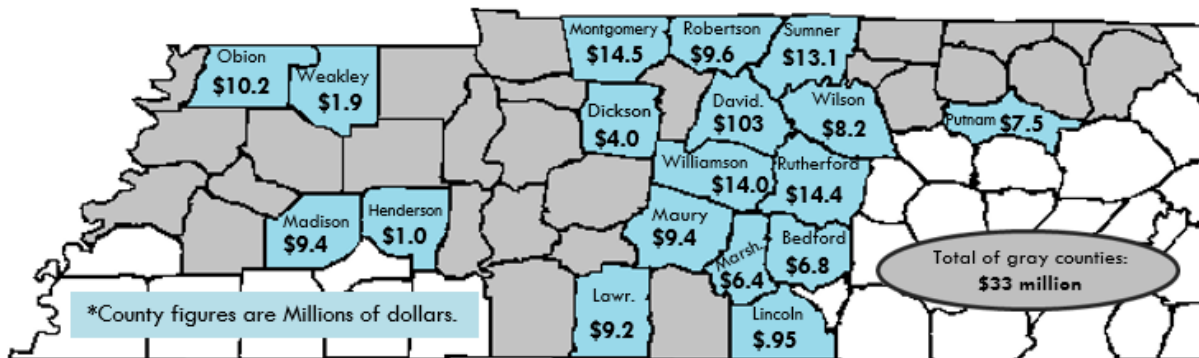
Goodwill Industries of Middle Tennessee encompasses 48 counties in middle and west Tennessee. As indicated, the blue counties represent areas in which Goodwill has one or more of the following: 100 placements, retail locations, Donation Express Centers, or Career Solutions Centers. The gray counties represent areas where Goodwill has placement impact only due to lack of establishments. The business revenue impact of the gray counties combined totaled \$86 million in 2014.

Employment Impact



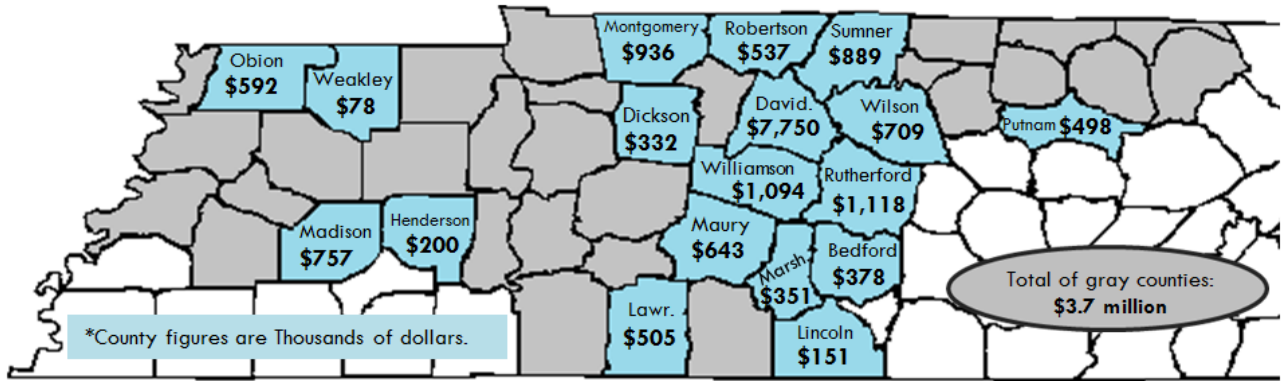
Goodwill Industries of Middle Tennessee encompasses 48 counties in middle and west Tennessee. As indicated, the blue counties represent areas in which Goodwill has one or more of the following: 100 placements, retail locations, Donation Express Centers, or Career Solutions Centers. The gray counties represent areas where Goodwill has placement impact only due to lack of establishments. The employment impact of the gray counties combined totaled 1,208 jobs in 2014.

Wages and Salaries



Goodwill Industries of Middle Tennessee encompasses 48 counties in middle and west Tennessee. As indicated, the blue counties represent areas in which Goodwill has one or more of the following: 100 placements, retail locations, Donation Express Centers, or Career Solutions Centers. The gray counties represent areas where Goodwill has placement impact only due to lack of establishments. The wages and salaries impact of the gray counties combined totaled \$33 million in 2014.

Fiscal Impact



Goodwill Industries of Middle Tennessee encompasses 48 counties in middle and west Tennessee. As indicated, the blue counties represent areas in which Goodwill has one or more of the following: 100 placements, retail locations, Donation Express Centers, or Career Solutions Centers. The gray counties represent areas where Goodwill has placement impact only due to lack of establishments. The fiscal impact of the gray counties combined totaled \$3.7 million in 2014.

D. County Economic Impact Rankings

Employment Impact:

Rank	County	Employment Impact*
1	Davidson	4,200
2	Montgomery	914
3	Rutherford	814
4	Sumner	769
5	Obion	607

*Includes the direct, indirect, and induced impact of operations and placements in 2014.

Wages and Salaries Impact:

Rank	County	Wages and Salaries Impact*
1	Davidson	\$177,206,088
2	Rutherford	\$24,762,441
3	Williamson	\$23,367,944
4	Montgomery	\$23,298,592
5	Sumner	\$21,050,936

*Includes the direct, indirect, and induced impact of operations and placements in 2014.

Business Revenue Impact:

Rank	County	Business Revenue Impact*
1	Davidson	\$109,303,262
2	Rutherford	\$16,637,463
3	Montgomery	\$15,755,281
4	Sumner	\$14,761,844
5	Williamson	\$13,502,479

*Includes the direct, indirect, and induced impact of operations and placements in 2014.

Fiscal Impact:

Rank	County	Fiscal Impact*
1	Davidson	\$7,750,332
2	Rutherford	\$1,117,965
3	Williamson	\$1,094,164
4	Montgomery	\$936,342
5	Sumner	\$889,483

*Includes sales, property, and other taxes from operations and placements in 2014.

D. Region and County Economic and Fiscal Impact Assessment

	Aggregate Total							
	2008	2009	2010	2011	2012	2013	2014	2024
Employment ¹	1,305	1,184	1,399	1,527	1,775	2,066	2,076	3,343
Capital Expenditures ²	\$1,251,282	\$872,265	\$9,173,057	\$4,793,169	\$9,224,706	\$11,529,243	\$7,225,531	\$16,903,851
Placements ³	2,384	2,180	2,540	2,564	2,737	5,222	9,263	17,207*
Annual Wage ⁴	\$43,324,445	\$38,715,534	\$48,238,819	\$48,522,989	\$52,650,964	\$99,203,541	\$154,598,729	\$278,860,000

	Economic and Fiscal Impact Assessment							
	Goodwill Operation		Capital Expenditure		Placements		Total Impact	
	2014	2024	2014	2024	2014	2024	2014	2024
Employment	2,742	4,267	99	213	10,551	17,179	13,392	21,659
Direct ⁵	2,076	3,339	58	136	9,263	15,407	11,397	18,882
Indirect ⁶ and Induced ⁷	666	928	41	77	1,288	1,772	1,995	2,777
Wages and Salaries	\$82,824,323	\$112,787,026	\$4,866,798	\$9,326,858	\$188,984,406	\$296,937,496	\$276,675,527	\$419,051,380
Direct	\$52,225,005	\$70,127,269	\$2,830,331	\$5,479,010	\$129,206,929	\$214,732,449	\$184,262,265	\$290,338,728
Indirect and Induced	\$30,599,318	\$42,659,757	\$2,036,467	\$3,847,848	\$59,777,477	\$82,205,047	\$92,413,262	\$128,712,652
Business Revenue	\$165,012,720	\$246,816,244	\$13,198,432	\$24,687,725	\$297,549,705	\$445,937,787	\$475,760,857	\$717,441,756
Direct	\$77,073,973	\$123,964,353	\$7,225,531	\$13,409,845	\$129,206,929	\$214,732,449	\$213,506,433	\$352,106,647
Indirect and Induced	\$87,938,747	\$122,851,891	\$5,972,901	\$11,277,880	\$168,342,776	\$231,205,338	\$262,254,424	\$365,335,109
Fiscal Impact	\$11,553,797	\$15,678,852	\$425,462	\$809,648	\$9,236,923	\$12,702,473	\$21,216,182	\$29,190,973
Sales	\$6,871,776	\$9,315,762	\$248,349	\$472,615	\$5,357,338	\$7,367,327	\$12,477,463	\$17,155,704
Property	\$2,963,591	\$4,017,743	\$107,608	\$204,799	\$2,309,107	\$3,175,448	\$5,380,306	\$7,397,990
Other	\$1,718,430	\$2,345,347	\$69,505	\$132,234	\$1,570,478	\$2,159,698	\$3,358,413	\$4,637,279

1.Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.

2. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.

3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)

4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.

5. Direct impact of employment, wages and salaries, and business revenue refers to the current state of these individual entities generated by Goodwill Industries.

6. Indirect impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by a business-to-business transaction.

7. Induced impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by employee spending.

*Placement Projection includes placements in public and private sectors as well as Goodwill Industries.

Nashville MSA ¹							
	2008	2009	2010	2011	2012	2013	2014
Employment ²	935	837	1,045	1,169	1,393	1,651	1,618
Capital Expenditures ³	\$960,097	\$852,649	\$8,979,562	\$4,331,607	\$8,794,768	\$11,195,971	\$6,100,124
Placements ⁴	1,693	1,550	1,830	1,875	1,790	3,269	5,426
Annual Wage ⁵	\$22,962,647	\$21,166,374	\$25,558,557	\$24,169,890	\$22,318,519	\$47,916,241	\$90,192,111

Economic and Fiscal Impact Assessment

	Goodwill Industries of Middle Tennessee ⁶	Nashville MSA Nonprofit Sector ⁷ Economic Impact	Goodwill's share in Economic Impact
Employment	8,096	72,095	11%
Wages and Salaries	\$175,951,223	\$2,663,501,138	7%
Business Revenue	\$280,004,292	\$6,116,475,694	5%
Fiscal Impact	\$12,430,286	\$201,247,937	6%

1. This table includes counties that fall in the Goodwill of Middle Tennessee and Nashville MSA region that have a Goodwill presence. These counties include: Davidson, Dickson, Maury, Robertson, Rutherford, Sumner, Williamson, and Wilson.
- 2.Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.
3. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.
4. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
5. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.
6. Figures for Goodwill Industries represent the sum of direct, indirect and induced variables from the 3 sectors of operations, capital expenditures, and placements from FY 2014.
7. Figures for the Nashville MSA Nonprofit Sector are estimates of the economic impact and economic contribution of the nonprofit sector in FY 2011. For more information see Murat Arik, *The Nonprofit Sector in the Nashville MSA*.

Bedford County							
	2008	2009	2010	2011	2012	2013	2014
Employment ¹	21	19	21	27	30	28	30
Capital Expenditures ²	\$169,147	\$2,264	\$4,088	\$6,535	\$28,733	\$2,671	\$17,017
Placements ³	85	75	103	110	123	216	323
Annual Wage ⁴	\$1,145,664	\$1,076,712	\$1,507,660	\$1,739,738	\$1,956,536	\$3,796,865	\$6,203,771

Economic and Fiscal Impact Assessment : 2014				
	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	35	0	354	389
<i>Direct</i> ⁵	30	0	323	353
<i>Indirect</i> ⁶ and <i>Induced</i> ⁷	5	0	31	36
Business Revenue	\$1,714,559	\$25,997	\$8,809,010	\$10,549,566
<i>Direct</i>	\$1,113,780	\$17,017	\$5,111,634	\$6,242,431
<i>Indirect and Induced</i>	\$600,779	\$8,980	\$3,697,376	\$4,307,135
Wages and Salaries	\$632,810	\$8,582	\$6,115,228	\$6,756,620
<i>Direct</i>	\$481,021	\$6,186	\$5,111,634	\$5,598,841
<i>Indirect and Induced</i>	\$151,789	\$2,396	\$1,003,594	\$1,157,779
Fiscal Impact	\$112,399	\$696	\$247,040	\$377,806
<i>Sales</i>	\$78,590	\$486	\$144,608	\$223,684
<i>Property</i>	\$33,809	\$210	\$62,166	\$96,185
<i>Other</i>	\$17,540	\$131	\$40,266	\$57,937

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.

2. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.

3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)

4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.

5. Direct impact of employment, wages and salaries, and business revenue refers to the current state of these individual entities generated by Goodwill Industries.

6. Indirect impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by a business-to-business transaction.

7. Induced impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by employee spending.

Davidson County

	2008	2009	2010	2011	2012	2013	2014
Employment ¹	677	613	753	841	1,036	1,161	1,017
Capital Expenditures ²	\$908,499	\$799,248	\$7,706,888	\$3,941,866	\$5,355,331	\$2,458,995	\$2,003,433
Placements ³	825	721	952	1,057	1,000	1,901	2,567
Annual Wage ⁴	\$9,212,767	\$8,561,133	\$11,586,484	\$10,924,360	\$8,900,570	\$24,006,473	\$42,419,880

Economic and Fiscal Impact Assessment: 2014

	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	1,292	22	2,886	4,200
Direct ⁵	1,017	12	2,567	3,596
Indirect ⁶ and Induced ⁷	275	10	319	604
Business Revenue	\$77,511,117	\$3,355,682	\$81,214,327	\$162,081,126
Direct	\$37,757,142	\$2,003,433	\$35,637,397	\$75,397,972
Indirect and Induced	\$39,753,975	\$1,352,249	\$45,576,930	\$86,683,154
Wages and Salaries	\$47,204,099	\$1,443,314	\$54,492,096	\$103,139,509
Direct	\$31,593,389	\$906,222	\$35,637,397	\$68,137,008
Indirect and Induced	\$15,610,710	\$537,092	\$18,854,699	\$35,002,501
Fiscal Impact	\$5,302,460	\$94,396	\$2,353,476	\$7,750,332
Sales	\$3,130,980	\$54,923	\$1,360,803	\$4,546,706
Property	\$1,390,891	\$23,804	\$586,396	\$2,001,091
Other	\$780,589	\$15,669	\$406,277	\$1,202,535

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.

2. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.

3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)

4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.

5. Direct impact of employment, wages and salaries, and business revenue refers to the current state of these individual entities generated by Goodwill Industries.

6. Indirect impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by a business-to-business transaction.

7. Induced impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by employee spending.

Dickson County							
	2008	2009	2010	2011	2012	2013	2014
Employment ¹	17	14	18	32	39	46	43
Capital Expenditures ²	\$10,618	\$9,073	\$1,870	\$149,729	\$4,244	\$21,670	\$48,834
Placements ³	90	108	124	92	78	84	203
Annual Wage ⁴	\$1,516,975	\$1,820,089	\$2,080,383	\$1,501,793	\$1,256,346	\$1,255,494	\$2,758,599

Economic and Fiscal Impact Assessment: 2014				
	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	52	1	219	272
<i>Direct</i> ⁵	43	1	203	247
<i>Indirect</i> ⁶ and <i>Induced</i> ⁷	9	0	16	25
Business Revenue	\$2,558,764	\$76,904	\$4,135,002	\$6,770,670
<i>Direct</i>	\$1,596,418	\$48,834	\$2,338,303	\$3,983,555
<i>Indirect and Induced</i>	\$962,346	\$28,070	\$1,796,699	\$2,787,115
Wages and Salaries	\$1,139,100	\$23,639	\$2,861,038	\$4,023,777
<i>Direct</i>	\$879,665	\$15,536	\$2,338,303	\$3,233,504
<i>Indirect and Induced</i>	\$259,435	\$8,103	\$522,735	\$790,273
Fiscal Impact	\$207,884	\$2,650	\$121,687	\$332,221
<i>Sales</i>	\$125,506	\$1,572	\$71,423	\$198,501
<i>Property</i>	\$54,025	\$680	\$30,708	\$85,413
<i>Other</i>	\$28,353	\$398	\$19,556	\$48,307

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.

2. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.

3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)

4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.

5. Direct impact of employment, wages and salaries, and business revenue refers to the current state of these individual entities generated by Goodwill Industries.

6. Indirect impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by a business-to-business transaction.

7. Induced impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by employee spending.

Henderson County

	2008	2009	2010	2011	2012	2013	2014
Employment ¹	34	36	32	35	43	49	45
Capital Expenditures ²	\$10,025	\$0	\$18,462	\$102,419	\$61,068	\$101,060	\$8,106
Placements ³	0	7	7	1	0	7	11
Annual Wage ⁴	\$0	\$123,232	\$80,014	\$7,540	\$0	\$111,908	\$146,998

Economic and Fiscal Impact Assessment: 2014

	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	51	0	12	63
<i>Direct</i> ⁵	45	0	11	56
<i>Indirect</i> ⁶ and <i>Induced</i> ⁷	6	0	1	7
Business Revenue	\$2,390,129	\$12,006	\$194,409	\$2,596,544
<i>Direct</i>	\$1,670,670	\$8,106	\$122,989	\$1,801,765
<i>Indirect and Induced</i>	\$719,459	\$3,900	\$71,420	\$794,779
Wages and Salaries	\$902,342	\$3,392	\$142,516	\$1,048,250
<i>Direct</i>	\$708,437	\$2,311	\$122,989	\$833,737
<i>Indirect and Induced</i>	\$193,905	\$1,081	\$19,527	\$214,513
Fiscal Impact	\$194,310	\$396	\$5,156	\$199,862
<i>Sales</i>	\$118,628	\$238	\$3,037	\$121,903
<i>Property</i>	\$50,991	\$103	\$1,305	\$52,399
<i>Other</i>	\$24,691	\$55	\$814	\$25,560

1.Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.

2. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.

3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)

4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.

5. Direct impact of employment, wages and salaries, and business revenue refers to the current state of these individual entities generated by Goodwill Industries.

6. Indirect impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by a business-to-business transaction.

7. Induced impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by employee spending.

Lawrence County

	2008	2009	2010	2011	2012	2013	2014
Employment ¹	29	27	26	27	27	33	32
Capital Expenditures ²	\$23,736	\$0	\$13,630	\$151,575	\$10,823	\$5,356	\$13,528
Placements ³	3	4	4	48	225	489	501
Annual Wage ⁴	\$55,661	\$68,640	\$58,756	\$804,586	\$3,456,882	\$8,366,829	\$8,379,626

Economic and Fiscal Impact Assessment: 2014

	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	38	0	543	581
Direct ⁵	32	0	501	533
Indirect ⁶ and Induced ⁷	6	0	42	48
Business Revenue	\$1,802,852	\$21,407	\$11,800,640	\$13,624,899
Direct	\$1,188,032	\$13,528	\$7,098,312	\$8,299,872
Indirect and Induced	\$614,820	\$7,879	\$4,702,328	\$5,325,027
Wages and Salaries	\$819,371	\$5,292	\$8,391,398	\$9,216,061
Direct	\$656,183	\$3,246	\$7,098,312	\$7,757,741
Indirect and Induced	\$163,188	\$2,046	\$1,293,086	\$1,458,320
Fiscal Impact	\$155,591	\$813	\$348,224	\$504,628
Sales	\$94,683	\$494	\$206,941	\$302,118
Property	\$40,726	\$213	\$88,883	\$129,822
Other	\$20,182	\$106	\$52,400	\$72,688

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.
2. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.
3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.
5. Direct impact of employment, wages and salaries, and business revenue refers to the current state of these individual entities generated by Goodwill Industries.
6. Indirect impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by a business-to-business transaction.
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Lincoln County

	2008	2009	2010	2011	2012	2013	2014
Employment ¹	30	29	24	26	30	30	29
Capital Expenditures ²	\$10,006	\$0	\$11,902	\$6,979	\$4,849	\$27,665	\$9,866
Placements ³	4	0	5	3	7	13	22
Annual Wage ⁴	\$48,553	\$0	\$80,600	\$49,304	\$117,980	\$231,158	\$368,254

Economic and Fiscal Impact Assessment: 2014

	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	34	0	24	58
Direct ⁵	29	0	22	51
Indirect ⁶ and Induced ⁷	5	0	2	7
Business Revenue	\$1,585,022	\$14,530	\$467,930	\$2,097,972
Direct	\$1,076,654	\$9,866	\$302,008	\$1,388,528
Indirect and Induced	\$508,368	\$4,664	\$165,922	\$678,954
Wages and Salaries	\$606,014	\$4,276	\$342,438	\$952,728
Direct	\$484,611	\$3,031	\$302,008	\$789,650
Indirect and Induced	\$121,403	\$1,245	\$40,430	\$163,078
Fiscal Impact	\$138,529	\$461	\$11,652	\$150,642
Sales	\$84,246	\$274	\$6,798	\$91,318
Property	\$36,224	\$118	\$2,920	\$39,262
Other	\$18,059	\$69	\$1,934	\$20,062

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.

2. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.

3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)

4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.

5. Direct impact of employment, wages and salaries, and business revenue refers to the current state of these individual entities generated by Goodwill Industries.

6. Indirect impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by a business-to-business transaction.

7. Induced impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by employee spending.

Madison County

	2008	2009	2010	2011	2012	2013	2014
Employment ¹	67	66	71	73	68	75	97
Capital Expenditures ²	\$33,050	\$0	\$10,342	\$14,992	\$237,492	\$24,987	\$858,599
Placements ³	150	145	157	123	135	181	370
Annual Wage ⁴	\$2,132,208	\$1,949,542	\$2,384,296	\$1,684,451	\$1,889,222	\$2,635,360	\$5,159,206

Economic and Fiscal Impact Assessment: 2014

	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	119	9	407	535
Direct ⁵	97	5	370	472
Indirect ⁶ and Induced ⁷	22	4	37	63
Business Revenue	\$6,093,915	\$1,353,396	\$8,456,934	\$16,650,039
Direct	\$3,601,222	\$858,599	\$4,390,644	\$8,850,465
Indirect and Induced	\$2,492,693	\$494,797	\$4,066,290	\$7,053,780
Wages and Salaries	\$3,100,477	\$568,254	\$5,732,994	\$9,401,725
Direct	\$2,306,646	\$408,049	\$4,390,644	\$7,105,339
Indirect and Induced	\$793,831	\$160,205	\$1,342,350	\$2,296,386
Fiscal Impact	\$463,392	\$40,571	\$252,876	\$756,839
Property	\$279,401	\$23,630	\$149,221	\$452,252
Sales	\$120,318	\$10,252	\$64,175	\$194,745
Other	\$63,673	\$6,689	\$39,480	\$109,842

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.
2. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.
3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.
5. Direct impact of employment, wages and salaries, and business revenue refers to the current state of these individual entities generated by Goodwill Industries.
6. Indirect impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by a business-to-business transaction.
7. Induced impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by employee spending.

Marshall County							
	2008	2009	2010	2011	2012	2013	2014
Employment ¹	24	19	21	26	29	33	31
Capital Expenditures ²	\$1,561	\$4,101	\$22,338	\$6,743	\$15,218	\$320	\$38,162
Placements ³	161	122	165	193	219	282	337
Annual Wage ⁴	\$2,468,735	\$1,873,129	\$2,739,680	\$3,168,566	\$3,714,310	\$4,675,616	\$6,010,557

Economic and Fiscal Impact Assessment: 2014				
	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	36	0	359	395
Direct ⁵	31	0	337	368
Indirect ⁶ and Induced ⁷	5	0	22	27
Business Revenue	\$1,691,219	\$53,991	\$7,638,512	\$9,383,722
Direct	\$1,150,906	\$38,162	\$5,063,036	\$6,252,104
Indirect and Induced	\$540,313	\$15,829	\$2,575,476	\$3,131,618
Wages and Salaries	\$743,055	\$17,073	\$5,643,309	\$6,403,437
Direct	\$616,513	\$12,873	\$5,063,036	\$5,692,422
Indirect and Induced	\$126,542	\$4,200	\$580,273	\$711,015
Fiscal Impact	\$149,303	\$1,662	\$200,341	\$351,306
Sales	\$90,857	\$989	\$117,817	\$209,663
Property	\$39,059	\$427	\$50,555	\$90,041
Other	\$19,387	\$246	\$31,969	\$51,602

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.
2. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.
3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.
5. Direct impact of employment, wages and salaries, and business revenue refers to the current state of these individual entities generated by Goodwill Industries.
6. Indirect impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by a business-to-business transaction.
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Maury County

	2008	2009	2010	2011	2012	2013	2014
Employment ¹	47	44	53	58	57	65	67
Capital Expenditures ²	\$0	\$0	\$15,596	\$8,883	\$5,186	\$1,625	\$9,866
Placements ³	144	117	157	124	117	245	430
Annual Wage ⁴	\$2,102,855	\$1,729,499	\$2,548,148	\$2,182,326	\$2,028,162	\$3,863,660	\$7,253,360

Economic and Fiscal Impact Assessment: 2014

	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	81	0	473	554
<i>Direct</i> ⁵	67	0	430	497
<i>Indirect</i> ⁶ and <i>Induced</i> ⁷	14	0	43	57
Business Revenue	\$4,114,036	\$15,593	\$10,966,229	\$15,095,858
<i>Direct</i>	\$2,487,442	\$9,866	\$6,076,207	\$8,573,515
<i>Indirect and Induced</i>	\$1,626,594	\$5,727	\$4,890,022	\$6,522,343
Wages and Salaries	\$1,851,438	\$5,315	\$7,551,017	\$9,407,770
<i>Direct</i>	\$1,390,984	\$3,588	\$6,076,207	\$7,470,779
<i>Indirect and Induced</i>	\$460,454	\$1,727	\$1,474,810	\$1,936,991
Fiscal Impact	\$322,694	\$500	\$319,660	\$642,854
<i>Sales</i>	\$194,466	\$294	\$186,625	\$381,385
<i>Property</i>	\$83,707	\$127	\$80,255	\$164,089
<i>Other</i>	\$44,521	\$79	\$52,780	\$97,380

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.
2. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.
3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.
5. Direct impact of employment, wages and salaries, and business revenue refers to the current state of these individual entities generated by Goodwill Industries.
6. Indirect impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by a business-to-business transaction.
7. Induced impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by employee spending.

Montgomery County

	2008	2009	2010	2011	2012	2013	2014
Employment ¹	77	75	82	61	68	75	84
Capital Expenditures ²	\$12,062	\$12,769	\$88,428	\$144,029	\$47,655	\$2,748	\$126,445
Placements ³	144	115	113	174	222	499	747
Annual Wage ⁴	\$1,944,708	\$1,760,751	\$1,774,787	\$2,787,146	\$3,318,092	\$7,518,174	\$11,361,093

Economic and Fiscal Impact Assessment: 2014

	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	100	2	812	914
Direct ⁵	84	1	747	832
Indirect ⁶ and Induced ⁷	16	1	65	82
Business Revenue	\$5,138,410	\$201,761	\$17,434,581	\$22,774,752
Direct	\$3,118,584	\$126,445	\$9,788,013	\$13,033,042
Indirect and Induced	\$2,019,826	\$75,316	\$7,646,568	\$9,741,710
Wages and Salaries	\$2,441,373	\$71,751	\$12,006,212	\$14,519,336
Direct	\$1,882,639	\$50,042	\$9,788,013	\$11,720,694
Indirect and Induced	\$558,734	\$21,709	\$2,218,199	\$2,798,642
Fiscal Impact	\$421,356	\$6,719	\$508,267	\$936,342
Sales	\$253,100	\$3,905	\$297,605	\$554,610
Property	\$109,065	\$1,694	\$128,034	\$238,793
Other	\$59,191	\$1,120	\$82,628	\$142,939

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3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.
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Obion County

	2008	2009	2010	2011	2012	2013	2014
Employment ¹	25	21	25	31	31	33	42
Capital Expenditures ²	\$1,360	\$482	\$11,364	\$4,248	\$8,591	\$7,300	\$44,960
Placements ³	168	140	130	134	98	289	506
Annual Wage ⁴	\$2,323,776	\$2,170,022	\$1,831,825	\$1,894,739	\$1,473,152	\$4,588,349	\$8,752,424

Economic and Fiscal Impact Assessment: 2014

	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	51	1	555	607
Direct ⁵	42	1	506	549
Indirect ⁶ and Induced ⁷	9	0	49	58
Business Revenue	\$2,524,531	\$72,858	\$12,532,156	\$15,129,545
Direct	\$1,559,292	\$44,960	\$7,300,415	\$8,904,667
Indirect and Induced	\$965,239	\$27,898	\$5,231,741	\$6,224,878
Wages and Salaries	\$1,265,663	\$23,066	\$8,883,087	\$10,171,816
Direct	\$986,039	\$14,599	\$7,300,415	\$8,301,053
Indirect and Induced	\$279,624	\$8,467	\$1,582,672	\$1,870,763
Fiscal Impact	\$205,538	\$2,659	\$383,716	\$591,913
Sales	\$124,387	\$1,596	\$228,721	\$354,704
Property	\$53,560	\$689	\$98,287	\$152,536
Other	\$27,591	\$374	\$56,708	\$84,673

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.
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3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.
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Putnam County							
	2008	2009	2010	2011	2012	2013	2014
Employment ¹	56	49	52	52	56	59	58
Capital Expenditures ²	\$30,239	\$0	\$12,941	\$24,042	\$15,511	\$161,166	\$8,726
Placements ³	96	78	104	79	132	144	320
Annual Wage ⁴	\$1,249,198	\$974,657	\$1,627,267	\$1,212,065	\$1,920,822	\$2,192,037	\$5,130,944

Economic and Fiscal Impact Assessment: 2014				
	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	70	0	351	421
Direct ⁵	58	0	320	378
Indirect ⁶ and Induced ⁷	12	0	31	43
Business Revenue	\$3,438,881	\$14,102	\$7,785,279	\$11,238,262
Direct	\$2,153,308	\$8,726	\$4,317,328	\$6,479,362
Indirect and Induced	\$1,285,573	\$5,376	\$3,467,951	\$4,758,900
Wages and Salaries	\$1,640,329	\$4,737	\$5,401,865	\$7,046,931
Direct	\$1,251,436	\$3,105	\$4,317,328	\$5,571,869
Indirect and Induced	\$388,893	\$1,632	\$1,084,537	\$1,475,062
Fiscal Impact	\$266,202	\$489	\$231,772	\$498,463
Sales	\$160,976	\$291	\$136,822	\$298,089
Property	\$69,280	\$125	\$58,809	\$128,214
Other	\$35,946	\$73	\$36,141	\$72,160

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.
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3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.
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Robertson County							
	2008	2009	2010	2011	2012	2013	2014
Employment ¹	34	36	43	35	40	39	48
Capital Expenditures ²	\$4,758	\$0	\$566,692	\$6,233	\$4,836	\$4,988	\$42,614
Placements ³	84	103	97	148	132	208	492
Annual Wage ⁴	\$1,201,462	\$1,435,194	\$1,426,494	\$2,335,351	\$2,051,375	\$3,675,818	\$8,814,200

Economic and Fiscal Impact Assessment: 2014

	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	55	1	526	582
Direct ⁵	48	1	492	541
Indirect ⁶ and Induced ⁷	7	0	34	41
Business Revenue	\$2,616,841	\$62,175	\$11,730,055	\$14,409,071
Direct	\$1,782,048	\$42,614	\$7,380,587	\$9,205,249
Indirect and Induced	\$834,793	\$19,561	\$4,349,468	\$5,203,822
Wages and Salaries	\$1,100,758	\$20,430	\$8,507,090	\$9,628,278
Direct	\$887,213	\$15,008	\$7,380,587	\$8,282,808
Indirect and Induced	\$213,545	\$5,422	\$1,126,503	\$1,345,470
Fiscal Impact	\$218,140	\$2,006	\$317,012	\$537,158
Sales	\$131,703	\$1,174	\$185,389	\$318,266
Property	\$56,690	\$509	\$79,670	\$136,869
Other	\$29,747	\$323	\$51,953	\$82,023

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.
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3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.
5. Direct impact of employment, wages and salaries, and business revenue refers to the current state of these individual entities generated by Goodwill Industries.
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Rutherford County

	2008	2009	2010	2011	2012	2013	2014
Employment ¹	38	28	32	41	37	90	136
Capital Expenditures ²	\$5,357	\$17,644	\$21,853	\$88,453	\$1,887,402	\$3,726,856	\$38,966
Placements ³	167	145	126	140	184	384	591
Annual Wage ⁴	\$2,539,028	\$2,178,758	\$1,963,241	\$2,277,184	\$3,134,477	\$7,048,305	\$9,735,898

Economic and Fiscal Impact Assessment: 2014

	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	166	0	648	814
<i>Direct</i> ⁵	136	0	591	727
<i>Indirect</i> ⁶ and <i>Induced</i> ⁷	30	0	57	87
Business Revenue	\$8,844,596	\$63,358	\$15,206,060	\$24,114,014
<i>Direct</i>	\$5,049,136	\$38,966	\$8,193,938	\$13,282,040
<i>Indirect and Induced</i>	\$3,795,460	\$24,392	\$7,012,122	\$10,831,974
Wages and Salaries	\$3,943,454	\$23,113	\$10,443,659	\$14,410,226
<i>Direct</i>	\$2,821,899	\$15,367	\$8,193,938	\$11,031,204
<i>Indirect and Induced</i>	\$1,121,555	\$7,746	\$2,249,721	\$3,379,022
Fiscal Impact	\$669,266	\$2,061	\$446,638	\$1,117,965
<i>Sales</i>	\$402,183	\$1,200	\$260,253	\$663,636
<i>Property</i>	\$173,158	\$519	\$111,971	\$285,648
<i>Other</i>	\$93,925	\$342	\$74,414	\$168,681

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.
2. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.
3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.
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Sumner County

	2008	2009	2010	2011	2012	2013	2014
Employment ¹	57	49	50	51	54	99	98
Capital Expenditures ²	\$24,305	\$4,111	\$28,062	\$55,793	\$1,284,558	\$3,195,714	\$0
Placements ³	206	144	143	121	106	199	603
Annual Wage ⁴	\$3,512,893	\$2,474,110	\$2,454,177	\$2,148,781	\$1,906,050	\$3,632,148	\$10,213,276

Economic and Fiscal Impact Assessment: 2014

	Goodwill Operation	Placements	Total Impact
Employment	117	652	769
Direct ⁵	98	603	701
Indirect ⁶ and Induced ⁷	19	49	68
Business Revenue	\$5,980,513	\$14,647,284	\$20,627,797
Direct	\$3,638,348	\$8,500,026	\$12,138,374
Indirect and Induced	\$2,342,165	\$6,147,258	\$8,489,423
Wages and Salaries	\$2,724,580	\$10,398,659	\$13,123,239
Direct	\$1,999,743	\$8,500,026	\$10,499,769
Indirect and Induced	\$724,837	\$1,898,633	\$2,623,470
Fiscal Impact	\$475,861	\$413,622	\$889,483
Sales	\$286,715	\$242,741	\$529,456
Property	\$123,458	\$104,406	\$227,864
Other	\$65,688	\$66,475	\$132,163

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.
2. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.
3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.
5. Direct impact of employment, wages and salaries, and business revenue refers to the current state of these individual entities generated by Goodwill Industries.
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Weakley County

	2008	2009	2010	2011	2012	2013	2014
Employment ^{1*}	5	2	5	8	3	4	5
Capital Expenditures ²	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Placements ³	32	21	33	32	19	46	115
Annual Wage ⁴	\$443,290	\$365,995	\$484,255	\$429,961	\$268,005	\$674,113	\$1,846,026

Economic and Fiscal Impact Assessment: 2014

	Placement/ Total Impact
Employment	125
Direct ⁵	115
Indirect ⁶ and Induced ⁷	10
Business Revenue	\$2,699,069
Direct	\$1,576,537
Indirect and Induced	\$1,122,532
Wages and Salaries	\$1,923,230
Direct	\$1,576,537
Indirect and Induced	\$346,693
Fiscal Impact	\$77,684
Sales	\$45,910
Property	\$19,739
Other	\$12,035

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.
 2. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.
 3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
 4. Total annualized earnings of the people placed in jobs through Goodwill Career Solutions Centers.
 5. Direct impact of employment, wages and salaries, and business revenue refers to the current state of these individual entities generated by Goodwill Industries.
 6. Indirect impact refers to the employment, wages and salaries, and business revenue generated in the regional economy by a business-to-business transaction.
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- *To avoid double counting, clients placed by Goodwill Industries are considered employees rather than placements. However, Weakley county does not have any Goodwill locations, so employment in this case is Goodwill employees working in surrounding counties residing in Weakley county.

Williamson County							
	2008	2009	2010	2011	2012	2013	2014
Employment ¹	33	29	61	63	79	97	138
Capital Expenditures ²	\$4,235	\$4,267	\$575,898	\$61,260	\$22,337	\$143,454	\$136,554
Placements ³	175	204	217	184	160	212	313
Annual Wage ⁴	\$2,843,386	\$2,822,789	\$3,263,671	\$2,678,083	\$2,816,986	\$3,779,799	\$4,794,910

Economic and Fiscal Impact Assessment: 2014

	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	180	2	343	525
Direct ⁵	138	1	313	452
Indirect ⁶ and Induced ⁷	42	1	30	73
Business Revenue	\$11,351,628	\$232,877	\$8,407,754	\$19,992,259
Direct	\$5,123,388	\$136,554	\$4,020,751	\$9,280,693
Indirect and Induced	\$6,228,240	\$96,323	\$4,387,003	\$10,711,566
Wages and Salaries	\$8,082,049	\$100,585	\$5,818,006	\$14,000,640
Direct	\$5,621,549	\$62,250	\$4,020,751	\$9,704,550
Indirect and Induced	\$2,460,500	\$38,335	\$1,797,255	\$4,296,090
Fiscal Impact	\$836,685	\$7,523	\$249,956	\$1,094,164
Sales	\$485,992	\$4,267	\$142,952	\$633,211
Property	\$210,353	\$1,856	\$61,706	\$273,915
Other	\$140,340	\$1,400	\$45,298	\$187,038

1. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters.
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3. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
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Wilson County							
	2008	2009	2010	2011	2012	2013	2014
Employment ¹	32	24	35	48	51	54	71
Capital Expenditures ²	\$2,325	\$18,306	\$62,703	\$19,390	\$230,874	\$1,642,669	\$3,819,857
Placements ³	2	8	14	9	13	36	227
Annual Wage ⁴	\$33,280	\$144,801	\$235,959	\$122,012	\$224,554	\$654,545	\$4,201,988

Economic and Fiscal Impact Assessment: 2014				
	Goodwill Operation	Capital Expenditure	Placements	Total Impact
Employment	86	44	250	380
Direct ⁵	71	25	227	323
Indirect ⁶ and Induced ⁷	15	19	23	57
Business Revenue	\$4,355,276	\$5,981,958	\$6,224,904	\$16,562,138
Direct	\$2,635,946	\$3,819,857	\$3,556,168	\$10,011,971
Indirect and Induced	\$1,719,330	\$2,162,101	\$2,668,736	\$6,550,167
Wages and Salaries	\$1,795,256	\$2,094,840	\$4,327,688	\$8,217,784
Direct	\$1,309,033	\$1,439,986	\$3,556,168	\$6,305,187
Indirect and Induced	\$486,223	\$654,854	\$771,520	\$1,912,597
Fiscal Impact	\$342,101	\$188,117	\$178,745	\$708,963
Property	\$205,929	\$109,743	\$104,143	\$419,815
Sales	\$88,646	\$47,573	\$44,789	\$181,008
Other	\$47,526	\$30,801	\$29,813	\$108,140

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	Balance of Region ¹						
	2008	2009	2010	2011	2012	2013	2014
Employment ²	7	6					4
Placements ³	139	149	166	136	192	338	606
Annual Wage ⁴	\$2,157,124	\$2,269,733	\$2,559,252	\$1,940,393	\$2,911,116	\$5,576,850	\$10,290,244

Economic and Fiscal Impact Assessment: 2014

	Placements	Remaining counties include
Employment	1,208	
Direct ⁵	606	• Benton • Gibson • Lauderdale
Indirect ⁶ and Induced ⁷	602	• Carroll • Giles • Lewis
Business Revenue	\$86,170,260	• Cheatham • Haywood • Macon
Direct	\$4,834,713	• Clay • Henry • Perry
Indirect and Induced	\$81,335,547	• Crockett • Hickman • Pickett
Wages and Salaries	\$33,284,169	• Cumberland • Houston • Smith
Direct	\$4,649,572	• Decatur • Humphreys • Trousdale
Indirect and Induced	\$28,634,597	• DeKalb • Jackson • Wayne
Fiscal Impact	\$3,697,557	• Dyer • Lake • White
Property	\$2,132,236	• Fentress
Sales	\$882,673	
Other	\$682,648	

1. For county level analysis and forecasting, counties with retail locations or over 100 placements were used. This template shows the remaining counties Goodwill Industries has made an impact in. In some special cases, placements are made outside of the region in surrounding counties. These clients are included in this template.
2. Total number of Goodwill employees. These employees may be spread among retail stores, Career Solutions Centers, donation sites, or headquarters
3. Money spent on buildings, machinery, or equipment in order to maintain or increase the current scope of operations.
4. Individuals placed in jobs at either public or private employers through Career Solutions. (Clients placed in jobs at Goodwill are included in employment only to avoid double counting)
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