

IMPROVING JOB QUALITY:

EVIDENCE FROM
GOODWILL INDUSTRIES
OF CENTRAL FLORIDA

Goodwill
Industries of Central Florida, Inc. goodwill





Goodwill Industries of Central Florida

Founded in Orlando in 1959, Goodwill Industries of Central Florida (GICF) is a nonprofit organization that receives, processes, and sells donated goods across its retail network of more than 50 stores, donation locations, and logistics centers. The revenue generated by these donations supports GICF's mission of "Building Lives That Work."® To advance that mission, GICF creates jobs, funds education, and provides supportive employment services—particularly for individuals facing barriers to employment, including people with disabilities.

7527 S. Orange Blossom Trail, Orlando, FL 32809

www.goodwillcfl.org

Acknowledgments

Several individuals contributed to this report: Clinton Key of Key Evidence & Insights, LLC, conducted and authored this research; Ed Durkee, President and CEO of Goodwill Industries of Central Florida, conceptualized the project and provided overall leadership; consultant Anne Allen contributed her expertise in writing, editing, and project management; and Kristin Coffey provided copyediting support. Graphic design by Kate Alter (Chazwald Jones, LLC).

Abstract

This descriptive study examines how Goodwill Industries of Central Florida implemented investments in job quality—including safety improvements, higher wages, stable schedules, expanded benefits, and career advancement supports—across its workforce of more than 1,500 employees. Findings show that GICF successfully implemented these changes, with measurable improvements in earnings, safety, schedule predictability, and retention. The findings offer important lessons about improving the quality of existing jobs as a powerful and underutilized strategy for advancing economic mobility alongside sector-based job training programs.

Content

01 Overview

Introduction	01
Summary of Key Findings	01
Goodwill and Job Quality	01
Methodology	05

06 Findings

1. Workplace safety improved, reducing risk and cost.	07
2. Worker earnings more than doubled, while hours worked increased by 40%.	08
3. Work schedules became more stable and predictable.	09
4. Benefit utilization increased by 30 percentage points.	11
5. Employee retention increased, strengthening workforce stability.	12
6. Access to economic mobility support expanded.	14

15 Job Quality Investments Compared to Training Models

1. Job quality investments deliver greater short-term wage and tenure gains than leading training programs.	16
2. GICF provides immediate, stable full-time employment compared to uncertain training outcomes.	17
3. Job quality investments enable advancement without income loss.	18
4. Job quality investments offer more consistent and equitable outcomes across workers.	19

20 Lessons Learned and Implications

22 Conclusion

23 Endnotes

25 Appendix

Overview

Introduction

Aligned with its mission of “Building Lives That Work,”® Goodwill Industries of Central Florida (GICF) has made significant investments to improve the quality of jobs created by its social enterprise. Beginning in 2021, GICF implemented its Five Promises—a comprehensive, worker-informed approach that included changes to wages, scheduling, benefits, safety, and career advancement practices.

The American Job Quality Study (2025) highlights persistent deficiencies in job quality across the U.S. labor market, finding that roughly 60% of U.S. workers do not hold quality jobs.¹ GICF demonstrates how employers can translate job quality principles into concrete workplace changes, alongside measurable improvements in worker outcomes.

Key Evidence & Insights, LLC, an independent research firm, conducted a descriptive analysis involving more than 1,500 employees working in over 50 retail and logistics locations. The study documents GICF's job quality investments and examines corresponding changes in selected employee and organizational outcomes between 2019 and 2025. This research brief presents the key findings, lessons learned, and broader implications for employers seeking to invest in job quality while strengthening long-term organizational performance.

Goodwill and Job Quality

ABOUT GOODWILL INDUSTRIES OF CENTRAL FLORIDA

Founded in Orlando in 1959, GICF is a nonprofit organization that receives, processes, and sells donated goods across its retail network of more than 50 stores, donation locations, and logistics centers. The revenue generated by these donations supports GICF's mission of “Building Lives That Work.” To advance that mission, GICF creates jobs, funds education, and provides supportive employment services—particularly for individuals facing barriers to employment, including people with disabilities. Serving the six counties of Central Florida, GICF has approximately 1,500 employees and an annual budget of \$132 million as of 2025.



SUMMARY OF KEY FINDINGS

Workplace safety improved, reducing risk and cost

Workplace safety improved substantially over the study period. Losses as a percentage of payroll—a standard insurance metric—declined from a peak of 4.03% in 2022 to 0.87% in 2025. This reduction reflects both safer working conditions and significant cost savings.

Worker earnings more than doubled, while hours worked increased by 40%

GICF's job quality investments were associated with substantial earnings gains. Between 2019 and 2025, typical worker earnings more than doubled. Workers employed for a full quarter earned more than \$9,200 in 2025, compared with about \$4,400 (inflation-adjusted dollars) in 2019. These gains reflect both higher wages and expanded access to full-time hours, with full-quarter workers logging approximately 40% more hours.

As an operator of thrift stores selling donated goods, GICF spends more than half its revenue on labor. For comparison, for-profit retailers, such as Walmart and Target, spend less than 10% of their revenue on wages.² Thus, GICF has five times the headcount per dollar of revenue. GICF views this larger headcount as an opportunity to pursue its mission by creating many high-quality jobs.

JOB QUALITY GOALS: THE FIVE PROMISES

Beginning in 2021, GICF embraced quality jobs as the first expression of its mission. The organization developed five core goals—known as the Five Promises. The Five Promises reflect decades of research, policy, and practice on job quality.³ Each promise was supported by specific progress indicators and organizational policies:



1. Safer workplaces: Promote employee well-being through investments in workplace safety, equipment, facility design, and safety training.



2. Higher wages and better benefits: Increase compensation and strengthen employee benefits to improve financial security.



3. Greater stability and agency: Provide full-time work with predictable schedules and consecutive days off.



4. Increased confidence through training: Invest in training and professional development to build employees' skills, confidence, and opportunities for advancement.



5. Support to achieve life goals: Provide coaching, resources, and other supports that help employees achieve their personal, financial, and career goals.

Together, the Five Promises establish GICF's definition of a quality job and serve as the foundation for the organization's operational changes and measurement framework.

OPERATIONAL STRATEGY: DELIVERING ON THE FIVE PROMISES

Most workforce programs aim to help people obtain quality jobs by equipping them with new skills and credentials. In contrast, GICF's strategy focuses on improving the quality of the jobs employees already hold.

Work schedules became more stable and predictable

Workers had more predictable schedules with fewer last-minute changes, reflecting progress toward stable, full-time work. Weekly hour consistency increased by roughly 8%, while the share of shifts requiring unscheduled extra hours fell from more than 75% in 2019 to 51% in 2025.

Benefit utilization increased by 30 percentage points

Participation in employee benefits rose from about 50% of workers in 2019 to over 80% in 2025. Growth was especially strong in retirement savings participation, suggesting that higher earnings and expanded benefits supported longer-term financial security.

Employee retention increased, strengthening workforce stability

Retention improved meaningfully. Among workers hired in 2025, 57% remained employed for at least six months, compared with 40% in 2019. Longer tenures benefit both workers and employers by reducing income volatility and turnover costs. Promotion rates declined slightly as the organization expanded, likely reflecting slower growth in supervisory roles relative to overall staffing.

Achieving the Five Promises required more than increasing wages and benefits—it required a complete transformation of GICF’s business practices. The four operational choices of Dr. Zeynep Ton’s *The Good Jobs Strategy* illustrate the types of connected operational changes GICF made to improve productivity and motivation, which enabled investments in the workforce.⁴

- **Focus and Simplify:** Focus on offering customers fair pricing and a fresh assortment in neat, clean, and organized stores. Design the donation flow for high-volume processing and accurate pricing to maximize the value of each donation. Eliminate unnecessary complexity such as ecommerce and fitting rooms so frontline employees can be productive and execute consistently.
- **Standardize and Empower:** Standardize the high-volume production method to improve material flow. Invest in logistics to move materials and distribute material handling equipment through a central warehouse. Empower and train employees to offer fair, consistent pricing to produce revenue that funds wage increases.
- **Cross-train:** Train employees to perform multiple roles—increasing flexibility, productivity, and ownership. Cross-trained employees contribute to both improved workflows and stable schedules.
- **Operate with Slack:** Schedule enough labor and capacity so employees have time to serve customers well, solve problems, improve processes, and develop leadership.

Together, these operational choices set employees up to be more productive and put employees at the center of the company’s success. Higher wages require higher productivity to sustain them. Stable, full-time schedules require stable workloads, which GICF created by smoothing material flow and cross-training.

To further support the Five Promises, GICF also launched two complementary economic mobility initiatives:

- Prosperity Platform, which helps employees set financial goals, reduce debt, and build assets.
- Goodwill Scholars, which prepays 100% of higher education costs for all GICF employees.

No single strategy explains GICF’s results. Rather, these improvements worked together as an integrated strategy—aligning investments in people with operational excellence that improved both job quality and organizational performance.

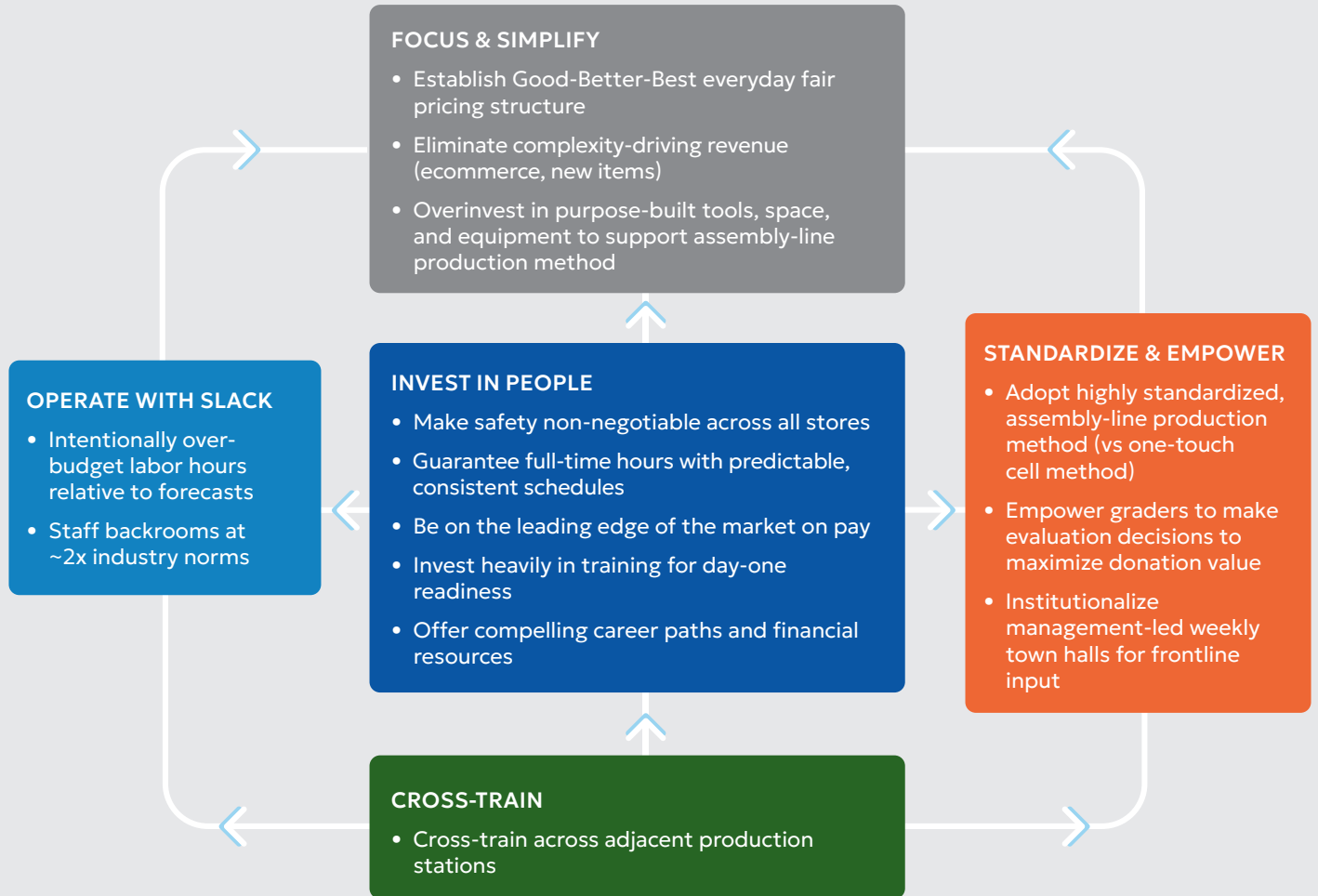
Access to economic mobility support expanded

GICF expanded programs to support workers’ long-term financial well-being, including education assistance and credential attainment through Goodwill Scholars and financial coaching through the Prosperity Platform. These services enable employees to pursue education and credentials, reduce debt, and build savings while maintaining stable employment. To date, 402 employees are enrolled in the Prosperity Platform, and 188 Goodwill Scholars are participating in GED or postsecondary education programs.

Job quality investments complement and rival leading workforce training programs

GICF’s job quality approach generated short-term wage gains, with workers experiencing annual wage increases that were roughly twice as large as those typically achieved by many of the nation’s highest-performing workforce training programs. Unlike many training programs, which often require participants to step away from paid work and do not guarantee employment upon return, GICF workers had stable jobs with benefits, predictable hours, and opportunities to advance while earning, which reduced common barriers to economic mobility. These findings suggest that investing in the quality of jobs people already hold can be as impactful as traditional training programs, while accelerating pathways to economic mobility.

GICF'S SYSTEM OF REINFORCING INVESTMENTS IN PEOPLE AND OPERATIONAL CHOICES



Source: Good Jobs Institute, <https://goodjobsinstitute.org>.

Worker voice is foundational to the conditions and supervision of GICF's workplaces. The organization established structured mechanisms to understand employees' experiences and identify the operational barriers preventing GICF from delivering on the Five Promises. Each week, the CEO and leadership team visit a different retail store or warehouse to hold town hall discussions with employees about what is working well and what needs to improve. Feedback is documented and followed by a formal process for implementing and reporting on changes. Annual employee surveys complement these conversations by assessing employee satisfaction, workplace conditions, and opportunities for improvement.

Methodology

An independent research firm, Key Evidence & Insights, LLC, conducted a descriptive study to evaluate the changes in job quality after the implementation of the Five Promises. The study compares key job quality outcomes experienced by hourly workers in 2019 with those experienced by similar workers in 2025. It then compares those changes in job quality with the changes reported from experimental and non-experimental studies of workforce training programs offering training for jobs in in-demand sectors.

The findings were derived from administrative data collected and shared by GICF as part of its regular human resources (HR) processes and shared in de-identified form. The data cover all workers employed in either 2019 or 2025, including workers with any record of receiving pay. The analysis excludes employees in executive and senior leadership roles, while including front line and material handling staff up to the level of store managers.

To be clear, this is a descriptive study that relies on available administrative data collected prior to the initiation of the research. It would be neither practical nor ethical to randomly allocate access to the implemented working condition improvements to some workers but not others. Nonetheless, the analysis offers 2019 conditions as a counterfactual for context and comparison. In principle, GICF could have retained most of its 2019 employment policies in the 2025 period, rather than making investments and undertaking the changes. The experiences of 2019 employees—working under prior policies—are a suggestive proxy for what they might have obtained without the changes. Because, as noted above, the specific elements that changed are interconnected and mutually reinforcing, it is not possible to separate the specific contribution of any given policy and all the changes (along with external changes in the economy and local labor markets) are treated as a package.

The analysis focused on elements of the work experience that are most likely to be available across other workforce development or training programs, allowing for broader comparison. In the descriptive analyses of conditions in 2019 and 2025, we use measures of distribution and central tendency—most often focusing on the median worker’s experience.

The study relies on measured, observable worker outcomes; the analysis did not capture workers’ personal experiences of those outcomes. For example, Finding 2 (in the next section) estimates how much a typical worker’s earnings increased as a result of the new pay policy, but it does not discuss how workers perceived those additional earnings or how the increased income affected their lives. Other research demonstrates that wage gains and additional improvements in job quality—such as those discussed below—can have substantial positive downstream effects on workers and their families. Future research may further explore these human impacts.

Findings

The analysis found that investments in workplace safety, operational efficiency, employee supports, and more stable staffing practices preceded substantial improvements in both job quality and business performance from 2019 to 2025. As operating margins and revenues increased, GICF reinvested those gains into higher wages, expanded benefits, more predictable schedules, education supports, and career mobility initiatives (see Appendix on business results). The findings that follow document the scale of these interconnected investments and the significant gains observed for both workers and the organization.



1 WORKPLACE SAFETY IMPROVED, REDUCING RISK AND COST.

Improving safety at GICF was not just a component of job quality—it was the starting point for it. Leadership prioritized safety improvements, recognizing that safer operations would drive efficiency, reduce costs, and generate the resources needed to reinvest in workers through higher wages and expanded benefits. In this way, safety became both a foundational investment in workers and a core business strategy.

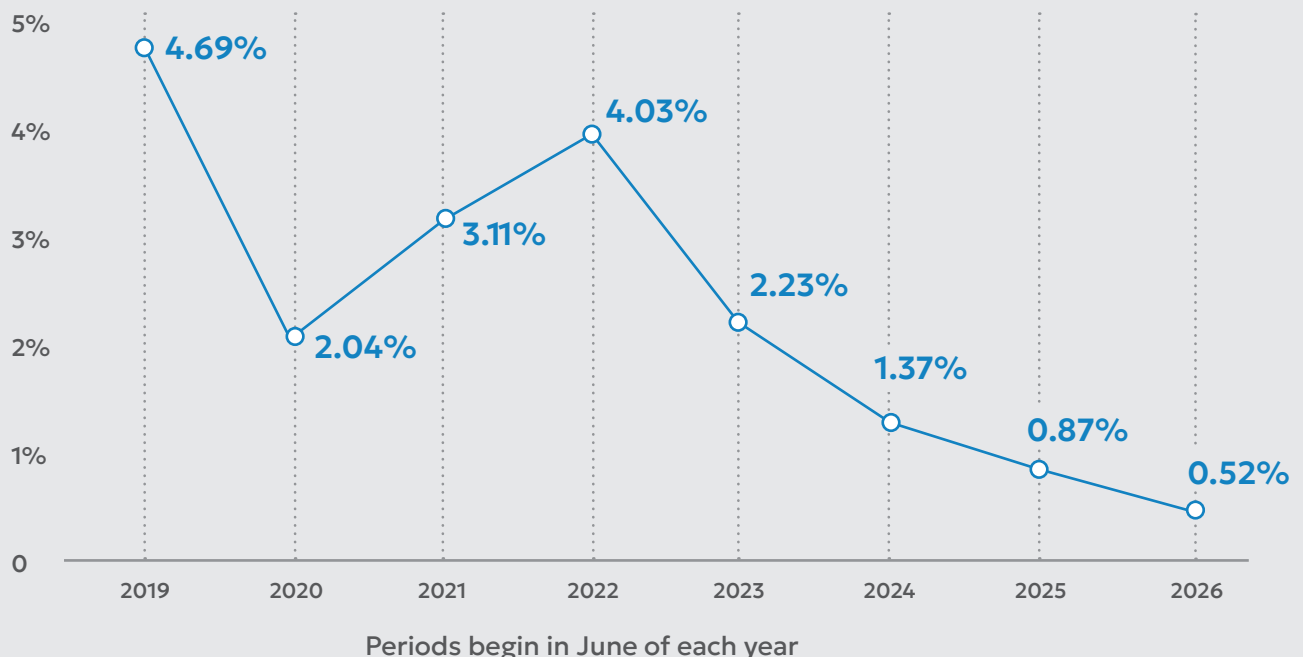
To put this approach into practice, GICF made significant investments in infrastructure and process improvements, strengthened supervisor training, replaced nearly all equipment and the entire truck fleet, and hired managers with expertise in worker safety.

Over the same period, work at GICF became significantly safer. **As shown in Figure 1, losses as a percentage of payroll peaked at 4.03% in 2022 and have steadily declined to 0.87% of payroll by 2025. For comparison, losses in similar retail industries average approximately 1.1%–3% of payroll.**⁵

Even as employees work more hours, compensable injuries have declined—reflecting improvements in infrastructure, supervision, training, and worker experience. This decline represents substantial financial savings and, more importantly, fewer disruptions, less physical and emotional strain, and a more stable, supportive workplace.

Improved safety contributed to increased productivity and stronger financial performance (revenues increased from \$69 million to \$132 million during this period), creating additional resources that GICF reinvested in worker pay and benefits. These reinvestments laid the foundation for broader gains in job quality as discussed in the following sections.

FIGURE 1: SAFETY LOSSES OVER PAYROLL TREND



2 WORKER EARNINGS MORE THAN DOUBLED, WHILE HOURS WORKED INCREASED BY 40%.

GICF set a goal to increase pay by improving business performance, beginning with operational changes—including the safety investments described above—that strengthened free cash flow and created the capacity to reinvest in wages. (Operating margins rose from 5% to over 20%.⁶) Management committed to translating these gains into annual pay increases, linking operational performance directly to worker outcomes.

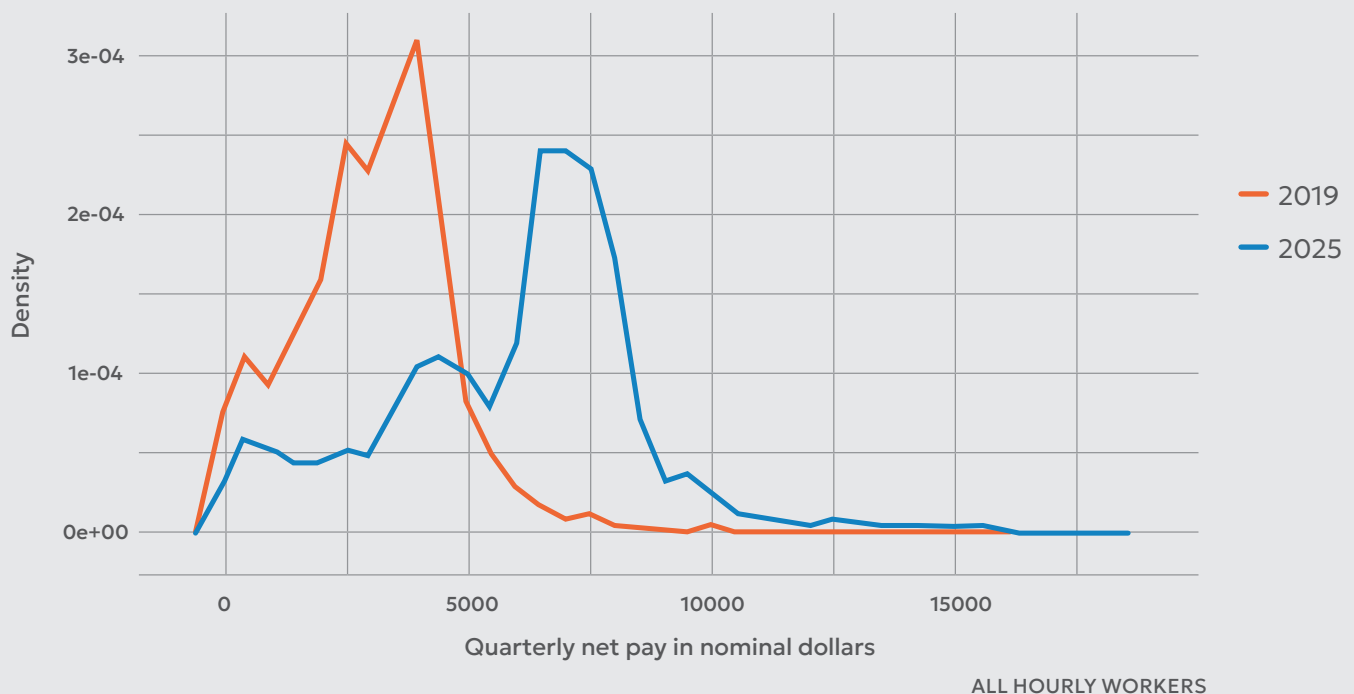
In parallel, HR and hiring managers prioritized expanding access to full-time work, ensuring that all employees who wanted full-time hours could obtain them. This effort included creating clearer pathways from part-time to full-time roles and actively monitoring the balance of part-time and full-time staff.

Between 2019 and 2025, workers at the median experienced significant earnings growth. Among workers employed for the full quarter,⁷ the gains were even larger. In the second quarter of 2025, these workers typically earned \$9,203—**more than double** what workers earned in the second quarter of 2019 (\$3,514, equivalent to \$4,435 in 2025 dollars). Annualized over the full year, this would be an increase of \$19,072⁸ for full-year employees.

The increase in earnings reflects both higher hourly wages and more hours worked per quarter. For example, **employees who worked the full second quarter in 2025 worked 40% more hours than their 2019 counterparts** driven in part by more consistent scheduling and practices that ensured workers who wanted full-time employment could obtain it.

These increases in total pay translated directly into higher take-home earnings. The density plot below shows a clear shift toward higher take-home pay in 2025 compared with 2019, indicating that wage gains were experienced broadly across the workforce.

FIGURE 2: WORKERS IN 2025 HAVE GREATER TAKE-HOME PAY THAN IN 2019



3 WORK SCHEDULES BECAME MORE STABLE AND PREDICTABLE.

GICF established a priority within HR to promote not only full-time employment but also stable and consistent scheduling. This included reducing last-minute schedule changes and posting schedules further in advance; providing consecutive days off; and aligning staffing models to support consistent schedules, among other practices to coordinate hours with worker preferences.

To examine changes in schedule stability, the analysis examined two dimensions of schedule stability: (1) the consistency of employees' working hours from week to week; and (2) the extent to which scheduled hours aligned with the hours worked. Both dimensions matter for job quality, as unpredictable schedules or last-minute changes can create instability for workers and make it difficult to plan for childcare, transportation, and other responsibilities outside of work.

Consistency of Weekly Work Hours

To assess schedule predictability, the analysis examined how consistent employees' weekly hours were within a given month. For each worker, a ratio was calculated comparing the week with the fewest hours worked to the week with the most hours worked. A ratio closer to one indicates more consistent weekly hours, while a lower ratio reflects greater variation in schedules.

*Using this measure, **schedule predictability increased by about 8% between 2019 and 2025**, indicating that workers were more likely to have consistent weekly hours. This pattern remains steady across multiple analytical approaches, suggesting a meaningful improvement in scheduling stability. Some variation remains in the data because recorded hours reflect both employer scheduling practices and employee absences, and because calendar months do not always align with the organization's scheduling or pay periods.⁹*

***By 2025, approximately 80% of GICF employees work full time compared to 30% in 2019.** By contrast, retail workers in Orlando typically work fewer than 30 hours per week on average and experience high levels of schedule unpredictability.*

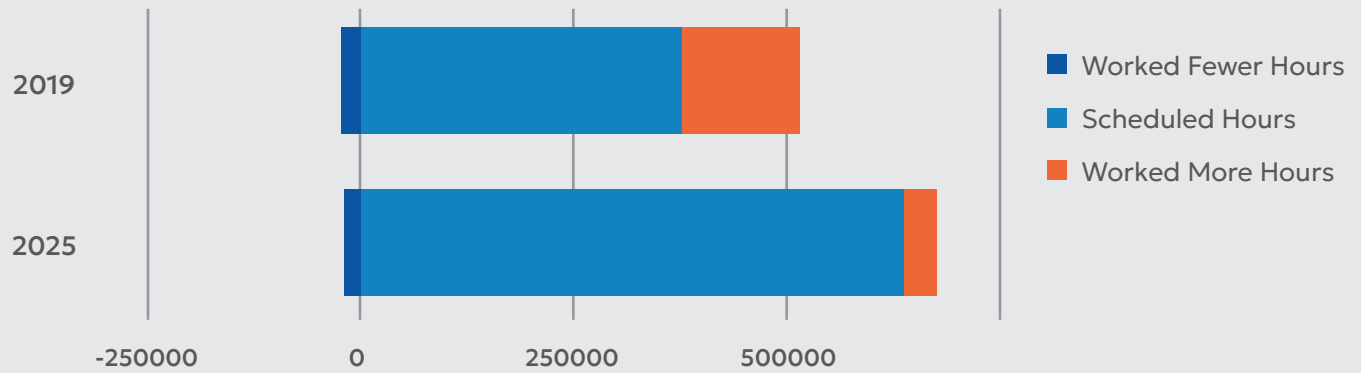
Alignment Between Scheduled and Actual Hours

To assess schedule reliability, the analysis examined how closely employees' actual hours aligned with their scheduled hours, measuring both negative deviations (working fewer hours) and positive deviations (working more hours).

*Schedule fidelity improved substantially between 2019 and 2025. Although workers in both periods sometimes worked fewer hours than scheduled, **shortfalls were roughly half as large in 2025**. Reductions in positive deviations were even more pronounced: In 2019, more than three-quarters of scheduled shifts included additional unscheduled work time; **this fell to 51% in 2025**. Additionally, in 2019 about 32% of all hours worked exceeded the scheduled amount, whereas by 2025 this figure had **declined to about 5%**.*

These changes reflect much stronger alignment between planned schedules and actual hours, helping to create more predictable schedules that are easier for workers to plan around—an important dimension of job quality.

FIGURE 3: SCHEDULE RELIABILITY IMPROVED SIGNIFICANTLY BETWEEN 2019 AND 2025



	2019	2025
Scheduled shifts (count)	55,138	↑ 84,045
Share of scheduled shifts with negative variation (percentage)	37%**	↑ 39%
Share of scheduled shifts with positive variation (percentage)	78%**	↓ 51%
Average (mean) negative variation in hours*	-1.0	↓ -0.5
Average (mean) positive variation in hours*	2.9	↓ 0.8
Total hours scheduled	389,106	↑ 640,690
Total hours worked	495,208	↑ 657,772
Total hours below scheduled	20,238	↓ 17,928
Total hours beyond scheduled	126,341	↓ 35,010

*Mean values include only shifts with negative (positive) variance

**Percentages sum to more than 100 because of variance caused by unscheduled shifts

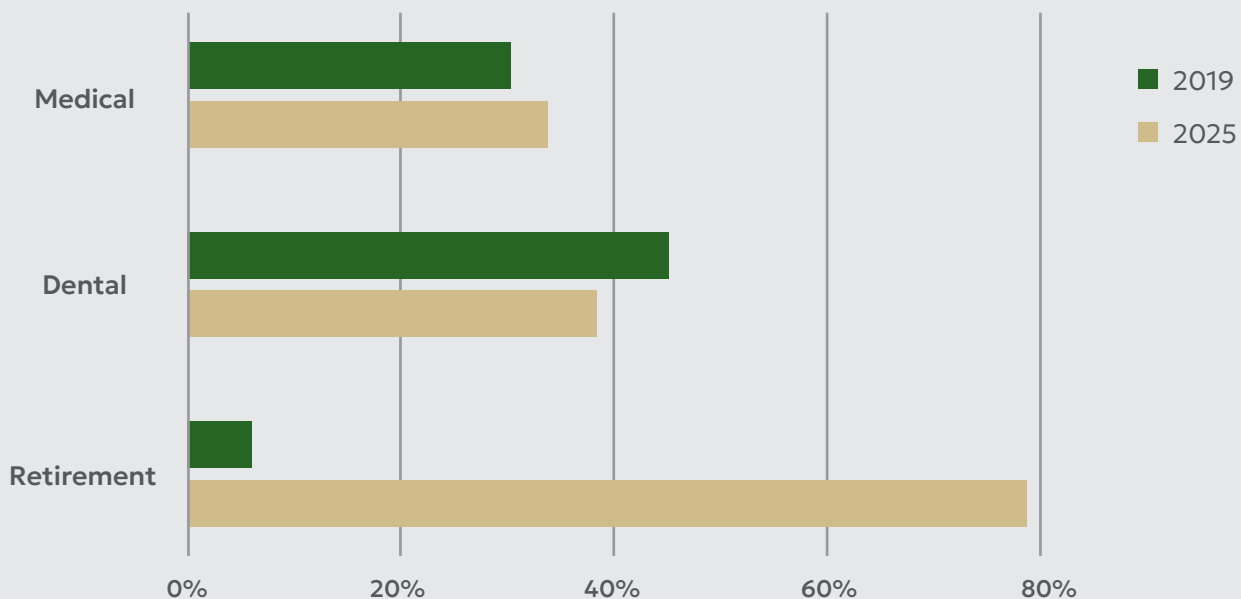
4 BENEFIT UTILIZATION INCREASED BY 30 PERCENTAGE POINTS.

Pay and stable, full-time schedules are essential—but not sufficient—to deliver true job quality. Access to benefits, such as health insurance and retirement savings, is equally critical.

To increase benefits uptake, GICF expanded its 403(b) program to include all workers; simplified enrollment processes; increased its share of medical insurance cost; and proactively promoted benefits through HR, supervisors, and Prosperity Planners. Additional efforts included aligning eligibility with increased access to full-time roles and reinforcing participation through onboarding and ongoing employee engagement.

To examine the changes of these practices, the study analyzed participation in health, dental, and retirement benefits.¹⁰ Among workers employed in 2025, **more than 80% participated in at least one employee benefit, compared with about half of workers in 2019**. Participation rates for health and dental insurance remained similar to 2019 levels. However, the share of workers contributing wages to a private retirement account and receiving employer matching funds increased substantially, suggesting that higher earnings and expanded benefits made it easier for workers to participate in longer-term financial security programs.

FIGURE 4: PARTICIPATION IN EMPLOYEE BENEFITS ROSE



5 EMPLOYEE RETENTION INCREASED, STRENGTHENING WORKFORCE STABILITY.

Worker tenure is both a feature and an outcome of job quality: Better jobs tend to support longer employer–employee relationships. Frequent turnover is costly for employers and destabilizing for workers, often leading to income volatility and increased risks of food and housing insecurity.

To increase worker tenure, GICF implemented targeted supervisor training focused on retention and advancement, along with HR practices such as stay interviews and structured career pathways planning. These efforts were complemented by improvements in compensation, benefits, schedule predictability, and safety improvements, discussed as part of this research paper.

Workers hired in 2025 were more likely than those hired in 2019 to reach key employment tenure milestones commonly used by workforce programs to measure the success of post-training placements. Of the 713 workers hired during the observation period (Q4 2024–Q3 2025), 54% remained employed through Q4 2025. As shown in Figure 5, workers hired in 2025 were more likely to remain employed for at least one, three, and six months compared with those hired in 2019. For comparison, the six-month industry average for frontline new hire retention is approximately 50%.¹¹

FIGURE 5: 2025 HIRES HITTING MILESTONES

PERCENTAGE REACHING	2019	2025
One month	72%	87%
Three months	54%	70%
Six months	40%	57%

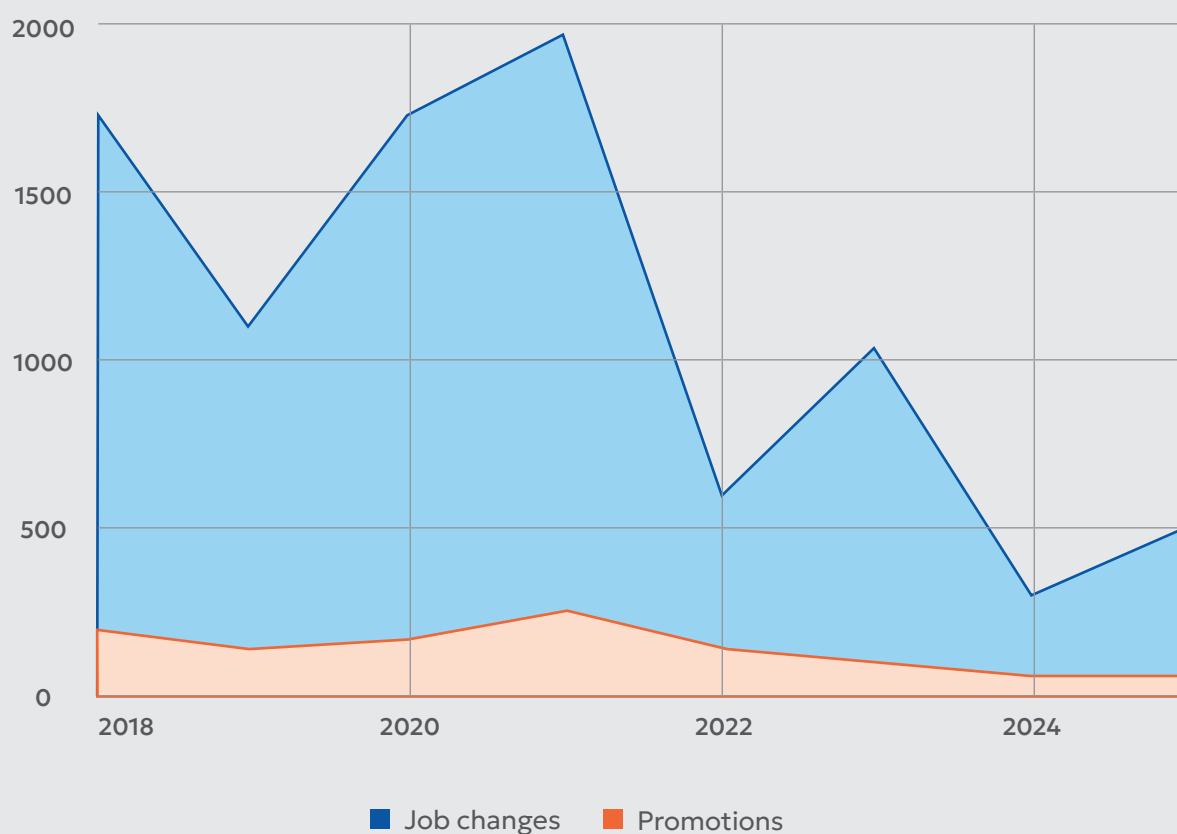
Advancement is closely tied to retention. Research shows that many workers leave employers when they cannot progress internally, which is why job quality measures often track promotions—typically indicated by changes in job title—as a signal of upward mobility.¹²

By this measure, advancement is the only indicator in this analysis where 2019 outperforms 2025. Because the workforce was smaller in 2019, a larger share of hourly employees were promoted to roles with greater supervisory or management responsibility than in 2024 or 2025.

At GICF, however, advancement is not limited to internal promotions. Programs such as the Goodwill Scholars support employees in pursuing education and credentials, while maintaining stable hours and income. Future research could explore whether improvements in job quality at GICF help workers access higher-quality roles—either within the organization or with future employers—by examining long-term earnings and career mobility.

FIGURE 6: JOB CHANGES ARE MUCH MORE COMMON THAN PROMOTIONS AMONG HOURLY EMPLOYEES

	ALL POSITION CHANGES	PROMOTIONS
2018 (after 8/13/2018)	1,723	183
2019	1,092	132
2020	1,757	147
2021	1,970	240
2022	588	116
2023	1,020	87
2024	284	46
2025 (Q1-Q3 only)	489	39



6 ACCESS TO ECONOMIC MOBILITY SUPPORT EXPANDED.

In 2022, GICF launched Goodwill Scholars, a prepaid tuition program that covers 100% of education costs—including tuition, books, and fees—for all employees, both full time and part time, pursuing any field of study at an accredited Florida-based public institution. Participation in Goodwill Scholars is approximately 8% of workers, compared to an industry standard of about 2% for tuition assistance programs.¹³

Goodwill also instituted Prosperity Platform, which connects employees to Prosperity Planners who help them make and achieve their own goals and connect them to resources that can help reduce debt, save, and build assets. To date, 402 employees are enrolled in the program. Early program data point to positive outcomes, including increased educational attainment, more promotions, improved housing stability, higher credit scores, and greater use of tax benefits.

Further research is needed to assess the long-term effects of Goodwill Scholars and the Prosperity Platform on employees' educational attainment and financial stability. The programs represent promising approaches to advancing the field of job quality and economic mobility.



Job Quality Investments Compared to Training Models

GICF's approach to connecting people to good jobs is **to make the jobs themselves better**. Many workforce programs pursue a different but complementary strategy: preparing workers for better jobs through training and credentials. Over the past several decades, federal and state governments, along with philanthropy, have invested billions of dollars in workforce training programs designed to help workers move from lower-quality jobs into higher-quality employment.¹⁴

These programs typically emphasize technical training paired with supportive services, such as job placement assistance, social supports, and post-program coaching. Training initiatives span many industries and target workers with varying levels of experience and education. Some programs, such as Per Scholas (technology) and Project Quest (healthcare and other sectors), require a high school diploma to enroll, while others—for example, Goodwill of Central and Southern Indiana's Excel Centers—serve individuals without diplomas and aim to help them obtain both a credential and access to jobs with advancement opportunities. Harvard's Project on Workforce has identified more than

75,000 training providers eligible for federal workforce funding.

Job quality investments and workforce training programs address different parts of the economic mobility challenge. Training can help people gain credentials, enter new sectors, and access opportunities they might not otherwise reach. Job quality investments address whether the jobs people enter—or already hold—provide sufficient wages and benefits and access to opportunities for advancement.

Placing GICF's Earnings in a Broader Context

To place the outcomes observed among GICF workers between 2019 and 2025 in context, we compared them with results from several widely studied workforce programs considered to be the highest performing.¹⁵ This analysis focuses on measures commonly reported by workforce training programs, allowing the magnitude of the changes observed at GICF to be considered within the broader workforce development context.

1 JOB QUALITY INVESTMENTS CAN PRODUCE WAGE AND TENURE GAINS GREATER THAN THOSE REPORTED BY LEADING TRAINING PROGRAMS.

Systematic reviews find that workforce training programs, on average, have a small, positive effect on participants' wages.¹⁶ Although a small number of programs have demonstrated stronger results than typical public-sector training efforts, impacts across the field vary widely.

Figure 7 presents findings from several rigorously evaluated workforce training programs to place the wage changes observed at GICF in the broader context of earnings effects reported by training programs.

These figures are not direct impact comparisons. The workforce training program evaluations used randomized controlled trials or quasi-experimental methods to estimate how participation affected subsequent earnings in the broader labor market relative to a control or comparison group. The GICF analysis, by contrast, descriptively compares outcomes among two different cohorts of hourly employees in 2019 and 2025. It does not follow the same employees over time, include a comparison group, or isolate the causal effects of GICF's job quality investments.

Within those limitations, the comparison provides useful context for understanding the scale of the changes observed at GICF. Average annual wages among GICF workers were \$11,828¹⁷—or 58%—higher in 2025 than 2019, while estimated annual earnings effects reported by most training programs shown in Figure 7 ranged from about \$4,700 to \$6,800, or 26% to 38%. These findings should not be interpreted as evidence that GICF's approach outperformed these programs. Rather, they illustrate that substantial earnings growth can occur through multiple pathways, including helping people access new employment opportunities and improving the quality of jobs they already hold.

FIGURE 7: COMPARING WAGE IMPACT OF GICF AND HIGH-PERFORMING WORKFORCE TRAINING PROGRAMS

PROGRAM	SOURCE	FOCUS	TIME PERIOD	ANNUALIZED IMPACT ON WAGES (2025\$)	IMPACT ON WAGES (%)	ESTIMATED COST PER PARTICIPANT (2025\$) ¹⁸
GICF	This study	Quality jobs	2019–2025	\$11,828	58%	N/A
Excel Centers	Notre Dame LEO ¹⁹	High school credential	2013–2015	\$4,725	38%	\$8,000–\$10,000
Per Scholas	MDRC ²⁰	Tech-sector skills	2011–2015	\$5,142 ²¹	26%	\$9,000–\$12,000
Project Quest	Economic Mobility Corporation ²²	Healthcare	2006–2012	\$5,863	Not reported	\$15,000
Wisconsin Regional Training Partnership ²³	Public/Private Ventures ²⁴	Construction trades	2003–2005	\$6,813	29%	Not reported
Year Up	Abt Associates ²⁵	Young adults	2013–2014	\$10,534	53%	\$30,000

2 JOB QUALITY INVESTMENTS CAN PROVIDE IMMEDIATE ACCESS TO STABLE, FULL-TIME EMPLOYMENT COMPARED TO UNCERTAIN TRAINING OUTCOMES.

Studies of the programs cited above find that 20% or more of participants often have no evidence of employment after completing training. While the rates of participants working are 7–10 percentage points higher than non-participants, not all are employed for pay.²⁶ Even fewer secure full-time positions or jobs in the sector they trained to enter. In some tech training programs, roughly half of early placements are contract (1099) roles without the benefits and protections of standard W-2 employment.

These findings illustrate an inherent limitation of workforce training: Programs can prepare participants for employment but have limited control over the availability or quality of the jobs participants ultimately obtain. Evaluations also tend to emphasize employment and earnings, providing less information about safety, stability, benefits, advancement opportunities, and other dimensions of job quality.

This is where employer-led job quality strategies play a complementary role. As an employer, GICF can directly shape wages, schedules, benefits, safety, and advancement opportunities, helping ensure that employment itself provides a stronger foundation for stability and economic mobility.



3 JOB QUALITY INVESTMENTS ENABLE ADVANCEMENT WITHOUT INCOME LOSS.

GICF's model allows workers to build skills and pursue advancement while earning wages. This addresses a challenge that can limit access to workforce training: the time and income required to participate.

Although the programs cited above are free and some provide stipends or assistance with transportation, equipment, or licensing fees, these supports rarely replace full-time earnings.²⁷ Programs typically last several months to more than a year, and participants are often encouraged—or required—to limit outside employment to focus on training. As a result, many participants must rely on family support, take on debt, or use public assistance to meet basic needs. Material hardship is common and a leading reason participants do not complete training or obtain credentials.

This limitation does not diminish the value of training, which can open pathways to new occupations and opportunities. It highlights the complementary value of employer-led strategies—such as GICF's—that allow workers to earn wages while building skills and improving their prospects for advancement.

“Goodwill is diving deeper into helping its employees and that makes us feel more valued.”

– Geo



4 JOB QUALITY INVESTMENTS COMPLEMENT WORKFORCE TRAINING.

Workforce training helps people gain the skills and credentials needed to access new opportunities. Job quality investments address whether the jobs they enter—or already hold—provide sufficient wages, stable hours, benefits, safety, and opportunities for advancement.

GICF demonstrates how an employer can improve these conditions while employees continue earning wages and building skills. Because organization-wide policies apply broadly—not only to workers selected for or able to complete a training program—they have the potential to extend meaningful improvements to more workers. Further research is needed, however, to determine whether workers across demographic groups benefit equitably.

Together, these strategies provide complementary pathways to economic mobility: Workforce training helps people access opportunity, while job quality investments help ensure that available jobs support stability and advancement.



Lessons Learned and Implications

This study illustrates that **improving the quality of existing jobs can be a powerful strategy for advancing economic mobility**. While many workforce development strategies prepare people to access better jobs through training and credentials, GICF invested in the jobs employees already held—through higher wages, expanded benefits, more predictable schedules, safer workplaces, and opportunities for advancement.

Between 2019 and 2025, these investments occurred alongside substantial improvements in earnings, stability, retention, and worker well-being. Some changes were comparable in magnitude to earnings outcomes reported by rigorously evaluated workforce training programs, although differences in populations, methods, and time periods prevent direct comparisons.

LESSONS LEARNED

- **Job quality investments can strengthen both worker outcomes and business performance.**
Improvements in wages, stability, and working conditions—when combined with improved business practices—were associated with increased productivity and financial performance, enabling reinvestment into mission-driven work. During the study period, headcount grew by 25% (from 1,200 to 1,500), revenues increased from \$61 million to \$132 million, and operating margins rose from a pre-pandemic baseline of 5% to over 20% for five consecutive years.
- **Worker voice is a critical driver of job quality improvements.**
Employee input helped GICF identify needs and shape changes in wages, scheduling, and workplace policies.
- **Job quality can reach workers within existing systems.**
Strengthening existing jobs can reach a broader set of workers, particularly those already employed, without requiring them to leave the workforce or forgo income.
- **Workforce training and job quality investments are complementary strategies.**
Sector-based training programs can be highly effective in specific contexts, but improving the quality of existing jobs offers an additional—and often underutilized—pathway to economic mobility.

IMPLICATIONS

The findings suggest that job quality itself can be a central lever for economic mobility.

- **For employers:** Investments in wages, scheduling predictability, benefits, and safety can strengthen both worker outcomes and organizational performance when combined with reinforcing operational choices that build productive, motivating work.
- **For the workforce development field:** Economic mobility strategies should not rely solely on credentialing programs for individuals outside the labor market. Improving the quality of existing jobs can be an equally important pathway to advancement and mobility for incumbent workers.
- **For philanthropy and policymakers:** Supporting employers willing to improve job quality represents a powerful complement to traditional workforce training investments and can drive more immediate and broadly shared gains.

“I love being able to go in and be able to grow as a person. I feel like every day I’m moving to something bigger in the future with my college classes through the Prosperity Platform.”

– Vanessa

Conclusion

The impact of GICF's job quality investments is clear and consistent. Workers earn more, work more stable hours, experience greater schedule predictability, and benefit from safer workplaces. At the same time, retention has improved, with new hires in 2025 staying longer than their 2019 counterparts. These gains have been achieved alongside improvements in organizational performance, including increased productivity and a stronger financial position.

Taken together, these findings demonstrate that improving the quality of existing jobs can be a powerful and practical strategy for advancing economic mobility. Although workforce development efforts have traditionally focused on preparing workers for better jobs, employers can drive meaningful improvements in worker outcomes by strengthening the jobs they already offer.

These results also have important implications for the broader workforce development field. Job quality investments should be considered a central complement to workforce training strategies, offering a pathway to advancement that does not require workers to exit the labor market or forgo income. Employers play a critical role in shaping these outcomes, and their policies and practices can directly influence both worker well-being and business success.

For GICF, this work provides a strong foundation to build upon. Continued investment in job quality, and the ongoing study of its effects, can further deepen impact and inform how to apply and scale these strategies.

A key area for future exploration is the lived experience of workers themselves. Although retention and performance data provide important signals, they are only partial measures of success. Understanding how these changes affect workers' quality of life, financial stability, and long-term aspirations is essential. Centering worker voice will help surface the full impact of these investments, including outcomes that cannot be fully captured through administrative data. Ultimately, the true measure of success lies in whether workers are not only more stable, but also better able to thrive.

For GICF, this work provides a strong foundation to build upon. Continued investment in job quality, and the ongoing study of its effects, can further deepen impact and inform how to apply and scale these strategies.



Endnotes

- 1 *The American Job Quality Study: 2025 State of the U.S. Labor Force* (Gallup, Jobs for the Future, Families & Workers Fund, and W.E. Upjohn Institute for Employment Research, 2025), https://www.jff.org/wp-content/uploads/2025/10/AmericanJobQualityReport_Final_10142025.pdf.
- 2 *Walmart Annual Report 2025* (Walmart Inc. Form 10-K, 2025), <https://stock.walmart.com/sec-filings/all-sec-filings/content/0000104169-25-000059/0000104169-25-000059.pdf>.
- 3 *The American Job Quality Study: 2025*.
- 4 Zeynep Ton, *The Good Jobs Strategy: How the Smartest Companies Invest in Employees to Lower Costs and Boost Profits* (New Harvest, Houghton Mifflin Harcourt, 2014).
- 5 Publicly available data on industry averages is scarce. Consultancies estimate that for retail nationally losses as a percentage of payroll are 1.1%–1.6%, with higher figures for subsectors such as grocery and warehousing.
- 6 During this period, revenues increased from \$69 million to \$132 million, and operating margins rose from a pre-pandemic baseline of 5% to over 20% for five consecutive years.
- 7 Among all workers who worked in a quarter, in 2019 the typical worker earned about \$4,006 per quarter in total pay (equivalent to \$5,057 in 2025 dollars). By 2025, the typical worker earned \$8,014 per quarter, representing a substantial increase in earnings.
- 8 Two different wage gain figures are presented in this report for different purposes. The \$19,072 figure used here is for internal comparisons and represents the average change in annualized earnings for GICF employees before and after the study period. The \$11,828 figure used later is calculated using a methodology designed to enable valid, apples-to-apples comparisons with workforce training program evaluations. While the figures differ because of the methodologies used, both describe the positive earnings gains experienced by GICF employees.
- 9 Some of the variation is expected and likely from the way the time tracking system organizes data. The analysis found instances where a worker with a consistent 30-hour week will have a below average week followed by a very heavy week. This could reflect actual working patterns or a quirk in the data where data from one week gets booked in the next week. Similarly, the analysis does not “see” expected non-working days like holidays that would reduce time in one week.
- 10 Other valued benefits—such as paid time off, sick leave, and family and medical leave—are provided by GICF, but comparable data on access and use across the two periods is not available.
- 11 Public data on industry average tenure for new hires is scarce. Several consultancies report figures around 50% from proprietary data.
- 12 Fredrik Andersson, Harry J. Holzer, and Julia I. Lane, *Moving Up or Moving On: Who Advances in the Low-Wage Labor Market?* (Russell Sage Foundation, 2006).
- 13 Employer surveys indicate that traditional tuition assistance programs typically have low utilization, with approximately 2%–5% of eligible employees participating (e.g., SHRM; Bright Horizons EdAssist; Lumina Foundation analyses).
- 14 Notably, in some periods and jurisdictions, the focus of public efforts has been to connect people to any job without a focus on or guardrails for job quality. The “work first” approach moved non-workers to work faster than training-focused programming but did not yield long-term job retention or wage gains over time.
- 15 In this comparison, there are two important differences between the data on GICF and the data used to estimate the impact of the workforce programs. First, each of the programs’ changes comes from randomized controlled trials where people are granted or denied access to the programs at random—isolating differences in outcomes to the receipt of program services. By contrast, GICF does not hire workers randomly, and factors

beyond its policies—such as local labor market conditions—may also contribute to observed improvements in job quality between 2019 and 2025. Second, workforce programs and the researchers who study them struggle to approximate the detailed wage and employment records. In the studies cited, a portion of both participants and the control group are not observed in the impact measures. Even when individuals are included, detailed information on work conditions—such as safety, benefits, and advancement—is often unavailable across the many workplaces that employ program graduates. In contrast, GICF maintains detailed administrative data on its employees, enabling a more complete picture of employment outcomes.

- 16 A 2024 review (<https://acf.gov/opre/report/evidence-snapshot-occupational-and-sectoral-training>) by the federally supported Pathways to Work Evidence Clearinghouse found that among about 20 programs with sufficient studies, the median program had an impact of \$272 on short-term annualized income. Suffice it to say, funding workforce development does not guarantee economic advancement for participants.
- 17 Two different wage gain figures are presented in this report for different purposes. The \$11,828 figure used here is calculated using a methodology designed to enable valid, apples-to-apples comparisons with workforce training program evaluations. The \$19,072 figure used earlier is for internal comparisons and represents the average change in annualized earnings for GICF employees before and after the study period. While the

figures differ because of the methodologies used, both describe the positive earnings gains experienced by GICF employees.

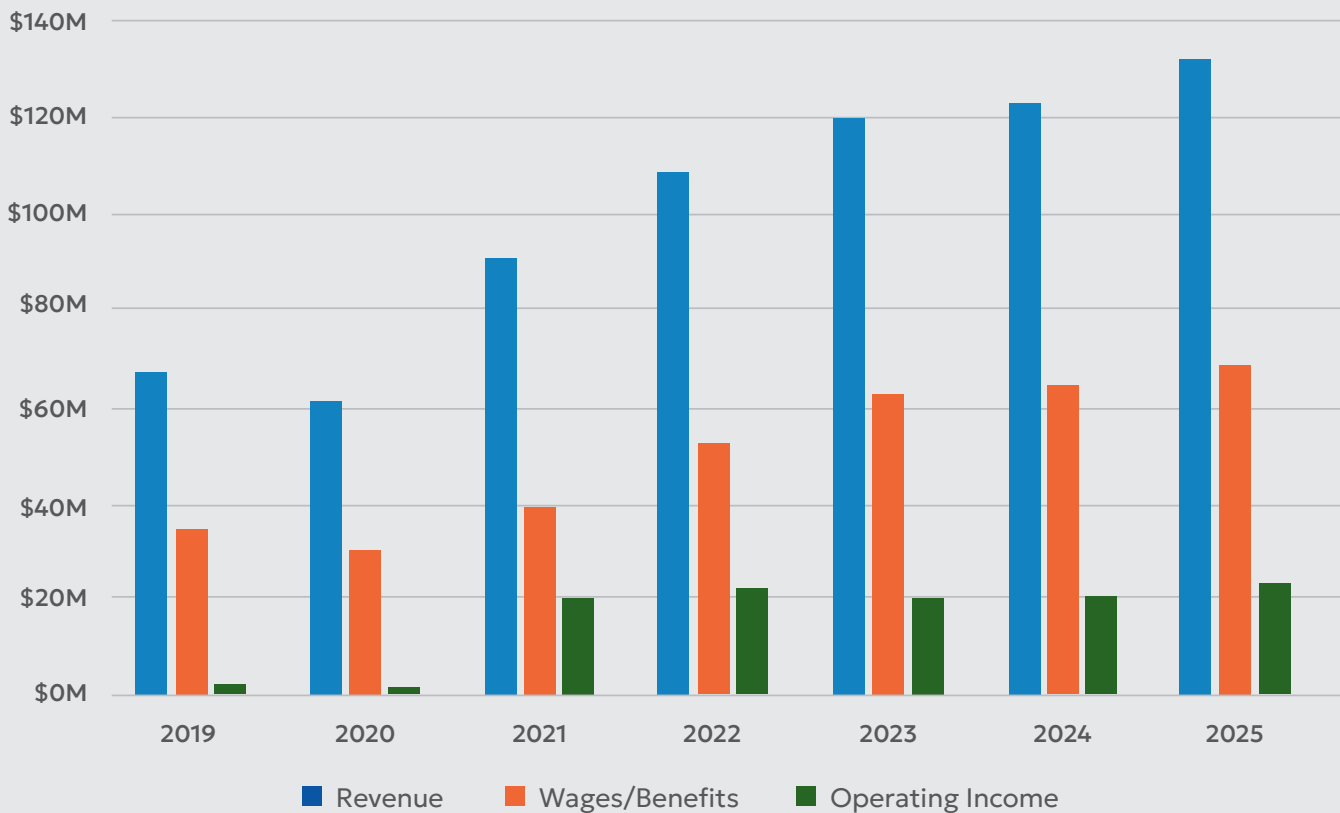
- 18 There is no single accounting standard for overall program costs or cost per student. Some cost studies include organizational expenditures around facilities, administration, recruitment, etc., and total expenditures; others only report direct costs related to instruction. The figures included in Figure 7 are inflation-adjusted expenditures based on published cost studies and other data sources.
- 19 *High Schools Tailored to Adults Can Help Them Complete a Traditional Diploma and Excel in the Labor Market* (University of Notre Dame, 2021), https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3840453.
- 20 Disclosure: The researcher for this study, Clinton Key, worked at MDRC after the linked study was completed and worked with Per Scholas on technical assistance and innovation projects. Key had no role in long-term follow-ups to the impact study described here that MDRC conducted during his tenure there. *Encouraging Evidence on a Sector-Focused Advancement Strategy* (MDRC, 2016), https://www.mdrc.org/sites/default/files/2016_Workadvance_Final_Web.pdf.
- 21 Recently, the 10-year follow-up results showed no difference in wages or employment between Per Scholas participants and the control group. St. Nicks, a green-jobs training program that had no impacts in the 2015 study, interestingly, saw significant impacts on participant earnings after 10 years.
- 22 *Fourteen Year Gains: Project QUEST's Remarkable Impact* (Economic Mobility Corporation, 2024), <https://economicmobilitycorp.org/fourteen-year-gains-project-quests-remarkable-impact/>.
- 23 In the 2024 review, the Wisconsin Regional Training Partnership's construction program had the largest impact of the reviewed programs; so large, in fact, that it badly skewed the reported average impact.
- 24 *Tuning In to Local Labor Markets, Findings from The Sectoral Employment Impact Study* (Public/Private Ventures, 2010), <https://ppv.issuelab.org/resources/5101/5101.pdf>.
- 25 *Evaluating Year Up's Programs for Young Adults* (Abt Associates), <https://www.abtglobal.com/projects/evaluating-year-ups-programs-for-young-adults>.
- 26 Few researchers think that 20% of graduates are not working at all. In some instances, it is work that does not show up in the data source (e.g., some contract work) or that has other data and reporting challenges.
- 27 Among training programs, certified apprenticeship programs are the exception and often, though not always, pay an hourly wage to participants. A study (<https://capolicylab.org/identifying-the-impacts-of-job-training-programs-in-california/>) of certified construction apprenticeship programs in California found wage impacts of about \$12,000 per year relative to a synthetic control group.

Appendix

GOOD JOBS REQUIRE A PRODUCTIVE BUSINESS

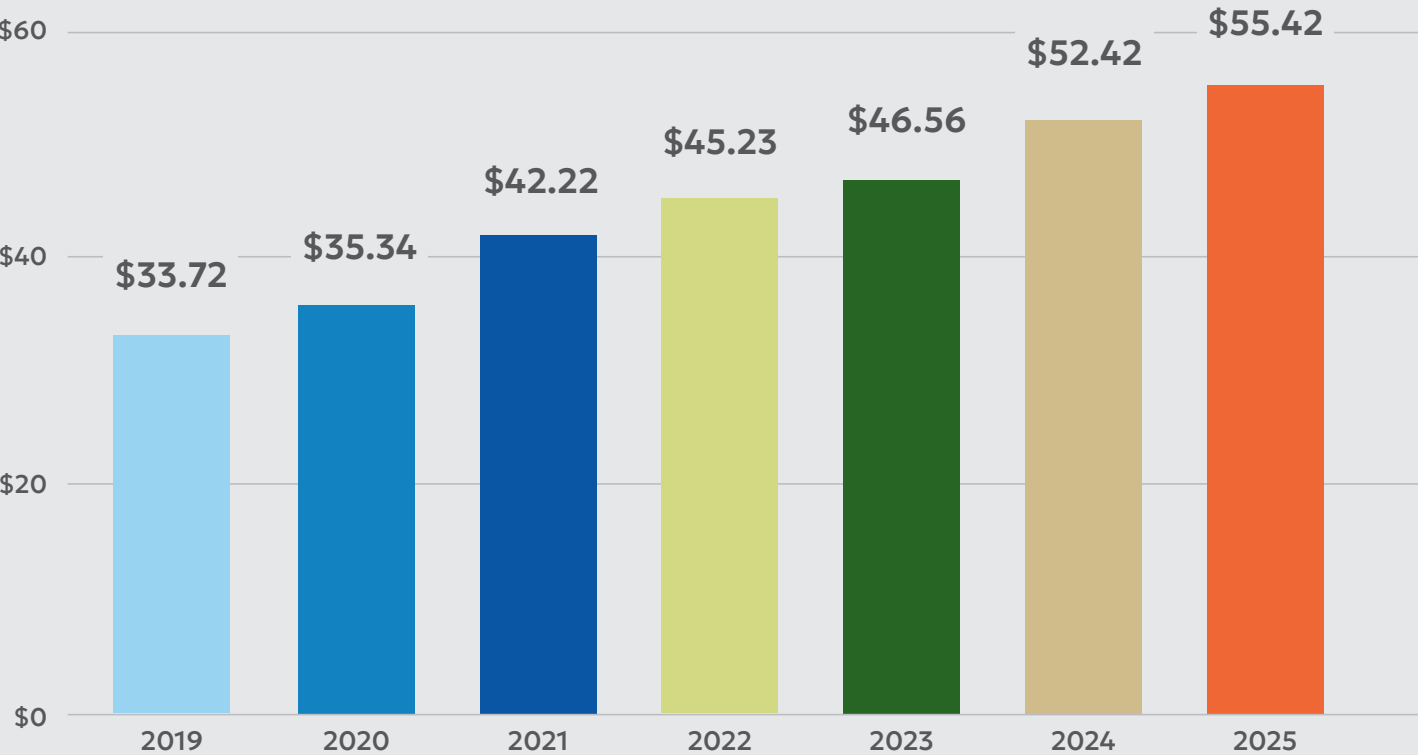
Job quality was funded by improving organizational performance. Between 2019 and 2025, GICF nearly doubled revenue while increasing labor productivity from \$34 to \$55 per labor hour. Operating income increased from approximately \$3 million before the pandemic to more than \$20 million in five consecutive years. Those gains created the financial capacity to invest in higher wages, better benefits, safer workplaces, and more stable schedules—without reducing services to the community.

REVENUE, WAGES/BENEFITS, AND OPERATING INCOME



The reason for the explosion in revenue, wages, and income is simple: Labor productivity improved allowing GICF to create better jobs while simultaneously strengthening the organization. The same operational improvements that increased productivity also reduced injuries, improved schedule stability, strengthened retention, and financed higher wages and benefits.

LABOR PRODUCTIVITY



“A good job means structure: I know my schedule, I know my colleagues, I know the staff, I know what is expected from me as a worker.”

– Norma

Building Lives That Work[®]

GOODWILL INDUSTRIES OF CENTRAL FLORIDA

**7527 S. Orange Blossom Trail
Orlando, FL 32809**

www.goodwillcfl.org

Serving Central Florida to pave the way for success in our community