

2025 ANNUAL REPORT

GOODWILL OF CENTRAL AND NORTHERN ARIZONA | GOODWILL INDUSTRIES OF MONOCACY VALLEY | GOODWILL OF THE SAN FRANCISCO BAY

2025 WAS A YEAR OF MEANINGFUL GROWTH, INNOVATION, AND DEEP IMPACT ACROSS OUR COMMUNITIES. ***AND IT STARTED WITH YOU.***



TIM O'NEAL
PRESIDENT &
CHIEF EXECUTIVE OFFICER

At Goodwill, our mission remains clear: to empower individuals, strengthen families, and build stronger communities.

This year, our mission continued to come to life in powerful ways. Across our regions in Central and Northern Arizona, San Francisco Bay, and Monocacy Valley, Maryland, Goodwill's no-cost career, education, training, and wellness services empowered thousands of individuals and families. This impactful work is made possible by every donation.

Alongside our mission services, we remained focused on advancing sustainability in the reuse space. Goodwill's legacy is built on finding new uses for things no longer needed.

This year, we continued to develop innovative solutions to increase reuse and recycling opportunities. From advances in textile recovery and recycling to the launch of Arizona's first virtually monitored, solar-powered donation containers, we advanced new ways to serve people and the planet. We are proud of our work not only to reduce waste but also to reimagine how donated goods can create even greater value for our communities.

These achievements are made possible by the dedication and commitment of our 6,000 team members, who turn every donation and purchase into positive impact through our career and education services and future-focused sustainability initiatives. That is our true impact as an organization.

Together, we continue to grow, innovate, and invest in solutions that move us closer to our mission.

THANK YOU FOR BEING PART OF GOODWILL'S MISSION.





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FINANCIAL OVERVIEW

GOODWILL of Central & Northern Arizona | GOODWILL Monocacy Valley | Goodwill SAN FRANCISCO BAY

SUPPORT & REVENUES

Donated Goods Programs	$394,214,986
Contributions and Grants	$13,268,795
Other Income	$3,290,371
Total Support and Revenues	**$410,774,152**



GOODWILL GAVE BACK TO THE COMMUNITY

PROGRAM SERVICES

Thrift Operations	$335,917,995
Mission Services	$8,193,429
Education Services	$3,354,629

SUPPORT SERVICES

Management and General	$54,410,269
Fundraising	$160,595
Total Given Back to the Community	**$402,036,917**

CONSOLIDATED STATEMENT OF FINANCIAL POSITION

ASSETS

Cash and Receivables	$22,332,809
Prepaids	$5,784,851
Inventory	$23,844,842
Investments	$31,440,810
Land, Buildings and Equipment, Net	$88,400,489
Right-Of-Use Assets, Net	$253,831,959
Other Assets, Net	$2,799,841
Total Assets	**$428,435,601**

LIABILITIES & NET ASSETS

Accounts Payable	$9,357,586
Accrued Expenses	$23,956,293
Deferred Rent and Revenue	$1,123,848
Financing and Capital Lease Obligations	$329,216,881
Other Liabilities	$2,991,960
Total Liabilities	**$366,646,568**
Net Assets	$61,789,033
Total Liabilities & Net Assets	**$428,435,601**

GOODWILL'S MISSION IN OUR COMMUNITY

Goodwill's mission is to empower individuals, strengthen families, and build stronger communities. We take a holistic approach to employment by providing job seekers and veterans with the tools to feel confident, purpose-driven, and successful.



Arizona

328,680
Services Provided

364
People Placed

399
Placements

51,681
Training Courses Taken

420
Credentials Earned

Career Services: **286**
Education Services: **134**

To learn more about our mission and market-specific community impact, visit our websites:

GCNA
goodwillaz.org

GIMV
gimv.org

GSFB
sfgoodwill.org



Maryland

18,372
Services Provided

16
People Placed

16
Placements

5,273
Training Courses Taken

39
Credentials Earned



San Francisco

21,805
Services Provided

735
People Placed

816
Placements

465
Training Courses Taken

78
Credentials Earned



MISSION IN ARIZONA

THE EXCEL CENTER

The Excel Center (TEC) is a tuition-free charter high school for adults ages 18 and up.

In 2025, The Excel Center **graduated 41 students**, granting them diplomas and certifications that will jumpstart their careers.

"FOR US, THIS NIGHT IS NOT JUST ABOUT A DIPLOMA. IT IS ABOUT SECOND CHANCES. IT IS ABOUT LEARNING TO BELIEVE IN OURSELVES AGAIN AND ACHIEVING, NOT ALONE, BUT TOGETHER."

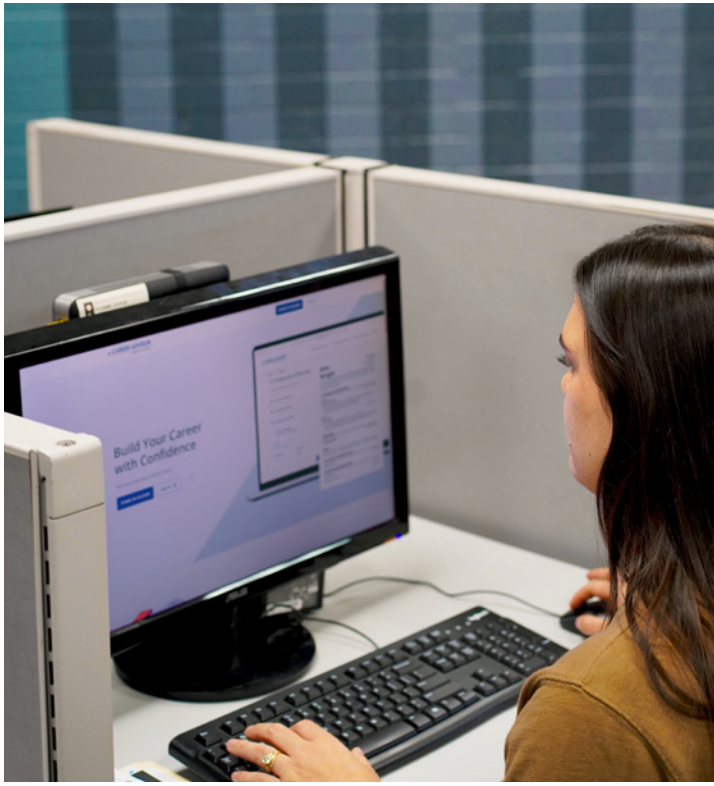
- Erika Lopez, Valedictorian

Excel Community Impact

- Every $1 invested per student returns approximately $7.50 in state tax revenue, or $9.70 when public-assistance and justice-system savings are included.
- By year 4 (2026), The Excel Center is projected to generate $210.5 million in annual economic output and support 1,782 jobs across Arizona.

VETERAN CAREER CENTER

Open Monday through Friday, the Veteran Career Center (VCC) offers veterans and job seekers an opportunity to complete in-demand job skills training at no cost to them, including tech and administrative certifications that can help them upskill and increase their lifetime earnings.



TESTIMONIAL | WAYNE BASS

Army veteran Wayne Bass (1992–1996) visited the Veteran Career Center seeking work after 12 years as his mother's full-time caregiver. After her passing, he experienced homelessness and stayed at MANA House while seeking housing. With support from a Veteran Career Coach, Wayne attended a job-readiness workshop, improved his computer skills, and earned scores above 90% on several proctored Northstar Digital Literacy certification modules. Mock interviews helped him prepare to discuss his experience and respond effectively to questions. Wayne interviewed with USAA Insurance Company and, in January 2025, accepted a Claim Representative position with full benefits. The Veteran Career Center also helped him obtain a State of Arizona Veteran Toolkit, providing nearly $350 in professional clothing for his new job.

SPARK COMMUNITY SCHOOLS

Spark Community Schools are no-cost, K-12 microschools powered by Goodwill, dedicated to providing high-quality, tailored learning experiences. In 2025, Spark experienced strong growth, reaching a peak enrollment of 54 students across five classrooms throughout the valley. Spark students also achieved strong academic gains and outperformed Arizona averages in both reading and math.

	AZ AVG	SPARK STUDENTS
MATH PROFICIENCY	20%	66.7%
READING PROFICIENCY	29%	45.5%

spark COMMUNITY SCHOOLS
one·n·ten Today's Youth. Tomorrow's Future.
Child Crisis Arizona Safe kids. Strong families.



VETERAN SERVICES CENTER IN MARYLAND

The Veteran Services Center (VSC) is a full-service center located in Frederick, MD, offering access to essential services that help our veterans smoothly transition to civilian life, including benefits navigation, career training, and connections to other community resources.

Goodwill Industries of Monocacy Valley assumed the role of "operator" of the VSC on October 1st, 2025, which was celebrated in November with an open house and resource fair offered to the community.

VSC BY THE NUMBERS

1,666
Unique Visitors

218
Individuals Received Services

15
Individuals Placed in Employment

VSC VETERAN SERVICES CENTER AT GOODWILL

GOODWILL Monocacy Valley

THE GOOD WORD IN THE COMMUNITY



GIZETH BACKUS

Gizeth is a Marine Corps Veteran and full-time employee at Hood College through Aramark. She came to the Veteran Services Center for career support and worked with Ms. Willson on her current and future goals, including resume development. With additional interview coaching from Ms. Carver, she secured a part-time position with the Golden Mile Alliance, a Frederick-based nonprofit, and will begin in January 2026.



RYAN PHELPS

A son of Marine Corps Veteran Kevin Phelps, Ryan received resume review and mock interview support from the Veteran Services Center. He applied for a Pharmacy Tech position at CVS in New Market, performed well in his interview, and is now training for certification before starting work in January 2026. He sees the role as a step toward his long-term goal of becoming a Pharmaceutical Sciences researcher.

CAREER & WELLNESS SERVICES IN SAN FRANCISCO

At the Community Assessment and Services Center (CASC), public agencies and nonprofit organizations work together to help people rebuild their lives through the power of work. Goodwill of the San Francisco Bay is proud to be one of those partners.

Through Goodwill of the San Francisco Bay's partnership with the San Francisco Adult Probation Department and CASC, Goodwill offers justice-involved individuals the opportunity to work one-on-one with a career advisor, build a development plan, and complete foundational and advanced skills training that can help them find a job, a better job, and ultimately a career.

Every reentry journey is different, and our approach is tailored to the needs of each individual. At Goodwill, we believe everyone deserves to be seen for their potential and given the opportunity to discover what is possible through the power of work.



THE GOOD WORD IN THE COMMUNITY

NATALIE O'BRIAN

"The Goodwill Career Center at CASC does an outstanding job helping justice-involved individuals secure meaningful employment. The program plays a vital role in reducing recidivism while also helping clients rebuild their confidence, self-esteem, and sense of purpose. The Career Advisor Team genuinely cares about the people they serve and takes personal pride in supporting each client's success."

ELISA MAPSON

Elisa Mapson partnered with a Goodwill career advisor to set goals and track progress. She completed Goodwill's Pathways to Employment and On-Ramp for TechSF programs before enrolling at San Francisco City College, where she is studying Liberal Arts and participating in the college's Work-Study Program. Each step created momentum for the next, reflecting what happens when someone feels supported and chooses to invest in their own future.



PAVING THE FUTURE OF SUSTAINABILITY

Goodwill of Central and Northern Arizona continues to lead sustainability through innovation and recovery. In 2025, we expanded our sustainability efforts by investing in new recovery systems, growing textile sorting and grading capacity, and deepening partnerships to keep more materials in use.



PLASTICS RECYCLING SOLUTIONS

We secured funding from the Dow Business Impact Fund to launch a post-consumer plastic film (soft plastic) recovery pilot. We also continued testing recycled content in newly manufactured products through the Circular Plastics Microfactory partnership with Arizona State University.

CIRCULAR FASHION & TEXTILE INNOVATION

Our Circular Fashion and Textile Innovation initiatives positioned GCNA to serve on a national working group with Reju, a textile-to-textile recycler, and provided leadership with the opportunity to visit Reju's facility in Europe. We launched GCNA's first national retail brand take-back partnership, with 71% of collected materials identified as suitable for reuse. We also advanced innovative tools and training through partnerships focused on AI-enabled sorting, textile repair, and scalable pathways for reuse.

TEXTILE SORTING & GRADING SERVICES

We also strengthened textile recovery infrastructure and expanded grading through new partnerships and value assessments. We launched grading operations in the Maryland warehouse, which now serves as both an operational site and a training hub for our partners.

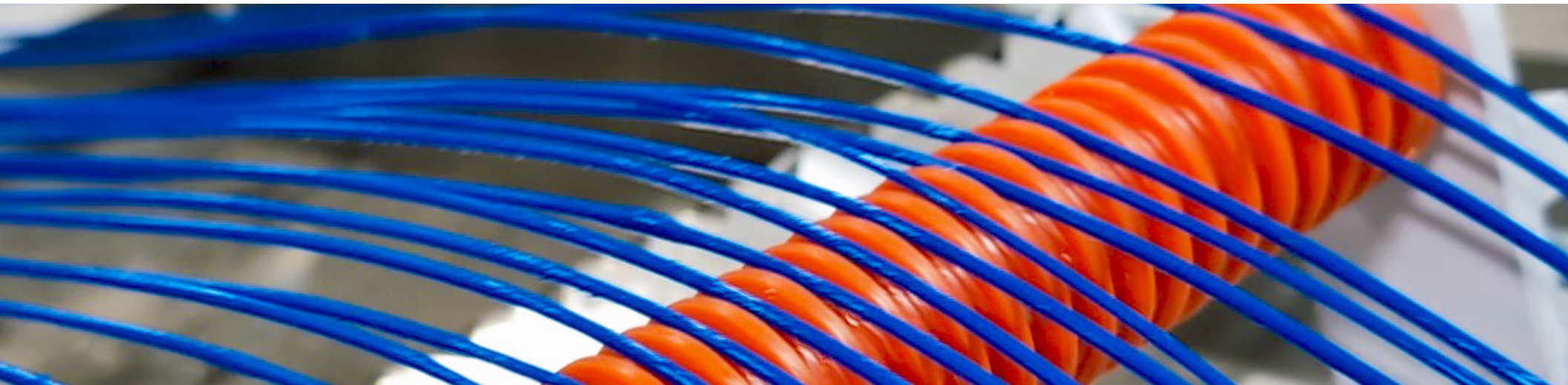
STRATEGIC PARTNERSHIPS

We strengthened strategic partnerships through participation in 15 national industry convenings, including conferences, working sessions, and webinars. As part of that effort, we helped develop programming for the inaugural Textile Recovery Summit at the Plastics Recycling Conference, reaching 2,500 industry stakeholders, including 19 regional Goodwill organizations. We also participated in the Secondary Materials and Recycled Textiles (SMART) conference and hosted nearly 50 international textile aftermarket leaders at the Goodwill Retail Operations Center, marking the first SMART visit inside a Goodwill headquarters. Locally, we partnered with the Town of Gilbert to launch Arizona's first virtually monitored, solar-powered Goodwill donation containers, collecting 8,100 pounds of donations between the October launch and year-end.

POLICY

Goodwill's presence in the San Francisco market directly engaged the organization in California's evolving policy landscape. Through GSFB, national conferences, industry partnerships, and active participation in Extended Producer Responsibility (EPR) policy development, Goodwill helped advance broader industry progress on circularity.

› Leadership joined government officials in Canada to examine current and emerging Extended Producer Responsibility (EPR) policies. Hosted by the California Foundation on the Environment and the Economy (CFEE), California Product Stewardship Council (CPSC), and Stewardship Action Foundation (SAF), the visit positioned Goodwill to engage in the evolving policy landscape.



STORES OPENED

9 ARIZONA

1 MARYLAND





















SPORTS SPONSORSHIPS

GOODWILL IS A PROUD PARTNER OF

Valley Suns

Frederick Keys

RETAIL IMPACT

Our donation acquisition efforts remained a top priority, as donations are the lifeline of our organization. Key donation highlights of 2025 include:

- Summer Donation Campaign: promotion providing donors with a one-time 20% off digital coupon for each donation instance, encouraging them to shop our stores.
- ReSupply Home Pickup Partnership: full-service donation home pickup program offered by our preferred partner, ReSupply.
- Grand Canyon University Student Moveout: annual partnership and collection effort resulting in thousands of pounds diverted.





RETAIL OPERATIONAL EXCELLENCE IN SAN FRANCISCO

Goodwill of the San Francisco Bay integrated shared systems across Bay Area stores and store teams continued to drive excellence through enhanced operational efficiencies. These efforts helped strengthen our mission pillars of career, training, and wellness services in the community.

POUNDS DIVERTED

199.1M	17.8M	39.5M	=	256.4M
ARIZONA	MARYLAND	CALIFORNIA		TOTAL

GOODWILL of Central & Northern Arizona

GOODWILL OF CENTRAL AND NORTHERN ARIZONA

www.goodwillaz.org

GOODWILL Monocacy Valley

GOODWILL INDUSTRIES OF MONOCACY VALLEY

www.gimv.org

Goodwill SAN FRANCISCO BAY

GOODWILL OF THE SAN FRANCISCO BAY

www.sfgoodwill.org