



# 2018 Community Needs Assessment Northern Shenandoah Valley



**People** inc.

*Building Futures, Realizing Dreams™*



**Headquarters** 1173 West Main Street, Abingdon, VA 24210 **Phone:** 276.623.9000 **Fax:** 276.628.2931 **Email:** [info@peopleinc.net](mailto:info@peopleinc.net)  
**Bristol Office** 800 Martin Luther King, Jr. Blvd, Bristol, VA 24201 **Phone:** 276.466.5587 **Fax:** 276.466.0728 **Email:** [bristol@peopleinc.net](mailto:bristol@peopleinc.net)  
**Grundy Office** 20694 Riverside Drive, Grundy, VA 24614 **Phone:** 276.935.4747 **Fax:** 276.935.4368 **Email:** [buchanan@peopleinc.net](mailto:buchanan@peopleinc.net)  
**Lebanon Office** 122 Price Street, Lebanon, VA 24266 **Phone:** 276.889.0999 **Fax:** 276.889.0117 **Email:** [russell@peopleinc.net](mailto:russell@peopleinc.net)  
**Manassas Office** 9324 West Street, Manassas, VA 20110 **Phone:** 571.445.3020 **Fax:** 571.445.3030 **Email:** [pwc@peopleinc.net](mailto:pwc@peopleinc.net)  
**Woodstock Office** 135 South Main Street, Woodstock, VA 22664 **Phone:** 540.459.9096 **Fax:** 540.459.8732 **Email:** [woodstock@peopleinc.net](mailto:woodstock@peopleinc.net)

# Table of Contents

|   |           |
|---|-----------|
| <b>Executive Summary</b> .....  | <b>1</b>  |
| <b>I. Methodology</b> .....   | <b>2</b>  |
| Surveys .....   | 2         |
| Focus Groups.....   | 3         |
| Secondary Data.....   | 3         |
| <b>II. Overview of People Incorporated Region</b> .....                 | <b>4</b>  |
| <b>III. Jobs, the Economy, and Financial Growth</b> .....               | <b>8</b>  |
| Employment .....  | 8         |
| Poverty .....   | 10        |
| Transportation .....  | 12        |
| <b>IV. Housing</b> .....  | <b>13</b> |
| Housing Quality and Quantity .....                                      | 13        |
| Affordable Housing .....  | 14        |
| Mobility .....  | 15        |
| Homelessness.....   | 16        |
| <b>V. Education</b> .....   | <b>17</b> |
| Educational Attainment.....   | 17        |
| <b>VI. Children and Youth</b> .....                                     | <b>19</b> |
| Kindergarten Readiness .....  | 19        |
| Childcare .....   | 20        |
| Head Start Supplemental Info.....                                       | 22        |
| <b>VII. Nutrition, Health, and Wellness</b> .....                       | <b>24</b> |
| Substance Abuse and Mental Health.....                                  | 24        |
| Affordable Health and Dental Care .....                                 | 26        |
| Nutrition.....  | 27        |
| <b>Appendices</b> .....   | <b>28</b> |
| Appendix A: Demographic Statistics by County .....                      | 28        |
| Appendix B: Armed Forces and Veterans Characteristics by County .....   | 29        |
| Appendix C: Unemployment Rate by County .....                           | 30        |
| Appendix D: Employment and Wages by Industry.....                       | 31        |
| Appendix E: Poverty by County .....                                     | 33        |
| Appendix F: Living Wage by County and Family Type.....                  | 34        |
| Appendix G: Transportation Characteristics by County .....              | 35        |
| Appendix H: Housing Characteristics by County .....                     | 36        |
| Appendix I: Educational Attainment by County .....                      | 37        |
| Appendix J: Head Start Estimates Methodology .....                      | 38        |
| Appendix K: Childcare Characteristics by County.....                    | 39        |
| Appendix L: Mental Health and Substance Abuse Indicators by County..... | 40        |
| Appendix M: Health Characteristics by County.....                       | 41        |
| Appendix N: Staff Survey Summary .....                                  | 42        |
| Appendix O: Board Survey Summary.....                                   | 43        |
| Appendix P: Partner Survey Summary .....                                | 44        |
| Appendix Q: Community Member Survey Summary.....                        | 45        |

# Executive Summary

People Incorporated is a Community Action Agency serving 13 counties and 3 cities in Virginia. As part of its mandate, and in order to provide the best and most comprehensive anti-poverty services, the agency undertakes a major triennial Community Needs Assessment. The findings from this assessment are used to inform the agency's selection and delivery of services in each community it serves. In addition to a comprehensive report, People Incorporated has prepared regional sub-reports to ensure that each community receives the most helpful information and that services are tailored to the unique needs of people in Northern Shenandoah Valley. People Incorporated hopes that the information in this report can also be used throughout the region by other non-profits and local governments to best serve the most disadvantaged members of our community.

Drawing from a wide variety of data sources including surveys, focus groups, and public data, the board of People Incorporated identified the following as the top needs for 2018 in the Northern Shenandoah Valley:

## Top Needs for 2018

- 1. Affordable Housing** – As housing costs continue to rise in the Washington DC metro area, families are beginning to relocate to the NSV region, placing greater demands on the housing market. Every stakeholder group surveyed overwhelmingly identified housing as the single greatest need in their community. Focus group participants noted that existing affordable housing is low quality.
- 2. Substance Abuse and Mental Health Services** – As rates of overdose and drug abuse increase, NSV stakeholders are concerned with the availability and cost of mental health and substance abuse services for residents. The region has the fewest mental health providers per resident of any of People Incorporated's regions at 1,714 residents per provider. Current services are overwhelmed, and issues like a minimal transportation system make it difficult for those in need to access treatment.
- 3. Living Wage Jobs** – Partners, staff, and community members all identified more and better paying jobs as a great need in the region. A living wage for a family of four in the region would be \$15.75 for two, full-time adults. The retail and food service jobs occupied by many low-income persons do not pay near this wage.

## Full Needs Assessment

The data in this report come from the five localities that comprise People Incorporated's Northern Shenandoah Valley service area: Clarke, Frederick, Page, Shenandoah, and Warren Counties. The full 2018 Community Needs Assessment and regional reports for the Southwest Virginia, Northern Piedmont, and Greater Prince William regions are available on the People Incorporated website, or by calling People Inc. at 276-623-9000.



# I. Methodology

People Incorporated serves thirteen counties and three cities through Virginia, providing 29 different programs. The data collection and analysis process used for this regional assessment ensured that data was collected from a variety of sources in each of the Northern Shenandoah localities.

## Surveys

People Incorporated staff administered surveys to four distinct groups in the fall of 2017 to gather data for the needs assessment.

### Staff Survey

All employees at People Incorporated were given the opportunity to provide input through a short, electronic survey in September 2017. Of the approximately 225 staff, 98 responded (response rate of 44%). For this region report, only responses from staff who work in Northern Shenandoah Valley have been included (10 responses).

### Board Survey

Similar to the staff survey, a short electronic survey was administered to the People Incorporated Board of Directors in September 2017. Of the 42 board members, 20 completed the survey (response rate of 48%). Even with only about half of the board members responding, all of the People Incorporated service areas were represented. For this regional report, only responses from board members who represent Northern Shenandoah Valley have been included (3 responses).

### Partner Survey

Collecting input from others who work with the low-income community throughout People Incorporated's service area was an important strategy for developing a comprehensive picture of current community needs. People Incorporated staff compiled a list of over 350 partners to survey. The survey was directly emailed to these individuals from People Incorporated staff. Additionally, the survey link was shared at meetings with other human services organizations during September and October 2017. A total of 301 partner surveys were completed with substantial representation from all of the People Incorporated services areas. For this regional report, only responses from partners who work in Northern Shenandoah Valley have been included (110 responses).

### Community Survey

The most important informant group for the Community Needs Assessment was individual members of the community. The community member survey was the longest of the surveys, and administered on paper rather than electronically. In an effort gather feedback from low-income community members, People Incorporated used a convenience sample. People Inc. partnered with other organizations including food pantries, medical missions, head start providers, and housing agencies to administer the survey. Additionally, program staff administered the survey to current clients in conjunction with People Incorporated's semi-annual customer satisfaction survey in October 2017. A total of 49 surveys were returned from Northern



Shenandoah Valley residents. Four percent of these survey respondents indicated that they had previously received services from People Incorporated.

## **Focus Groups**

To better understand how each need manifests in the community and individuals' lives, People Incorporated conducted five focus groups in Northern Shenandoah Valley. This included four focus groups with representatives of partner organizations and one focus group with the People Incorporated board of directors. Focus groups ranged in size from three to thirteen, with an average size of eight. Focus groups allowed us to dig in and get a better understanding of how needs are interrelated and the unique effects they have in a community.

## **Secondary Data**

Primary data collected by People Incorporated is supplemented with publicly available secondary data throughout the report. Data from the US Census, Bureau of Labor Statistics, Kids Count, Virginia Department of Education, and many other sources support our understanding of how local needs fit into larger trends, and offer a comparison to state and national issues. All sources of secondary data are cited within the report.

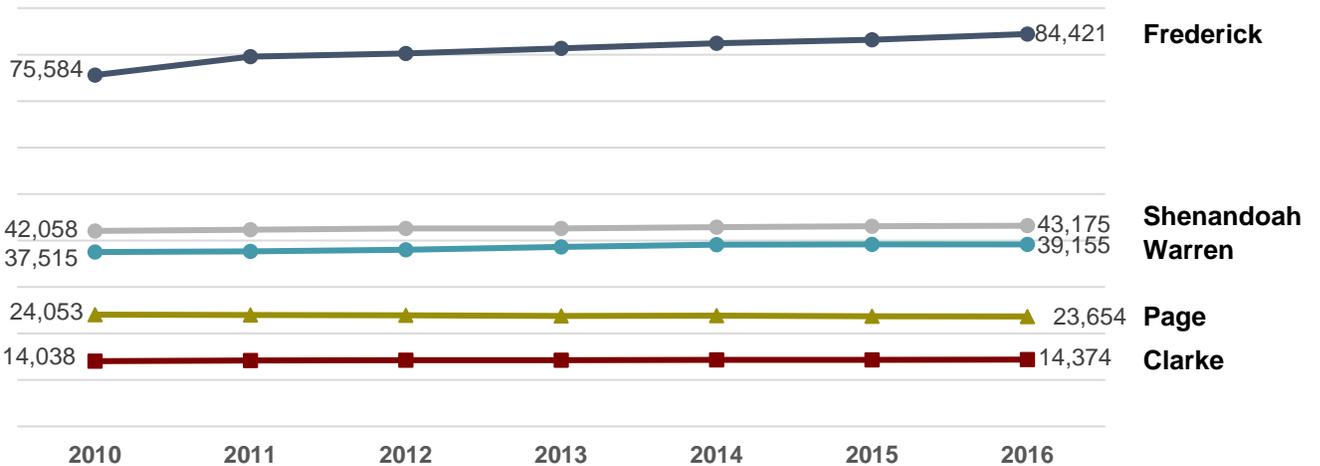


## II. Overview of People Incorporated Northern Shenandoah Valley Service Area



People Incorporated’s Northern Shenandoah Valley region includes the counties of Clarke, Frederick, Page, Shenandoah, and Warren. While geographically close, these counties differ in population, rurality, and diversity.

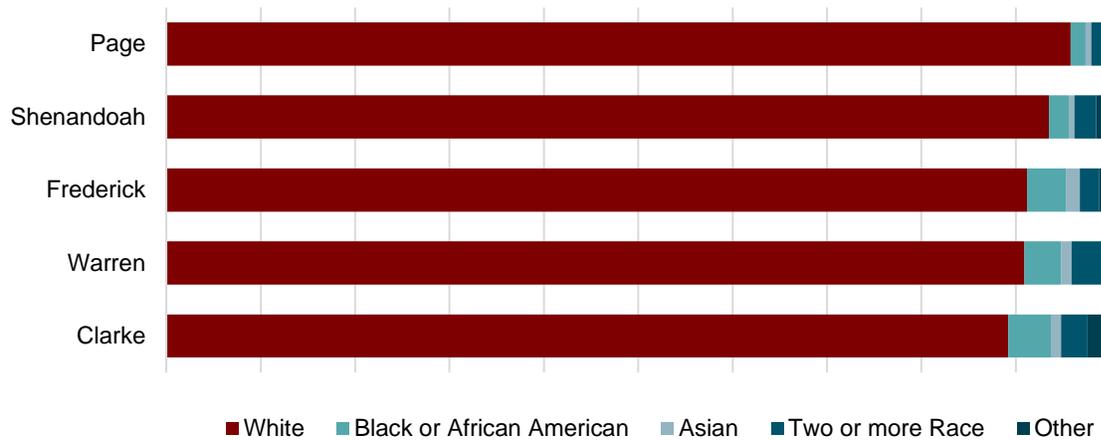
Figure 1. Population Trend by County<sup>1</sup>



Since 2010, **Frederick, Shenandoah, and Warren Counties** have seen growth. On the other hand, the more rural counties of **Page and Clarke** have maintained their small populations.<sup>1</sup>

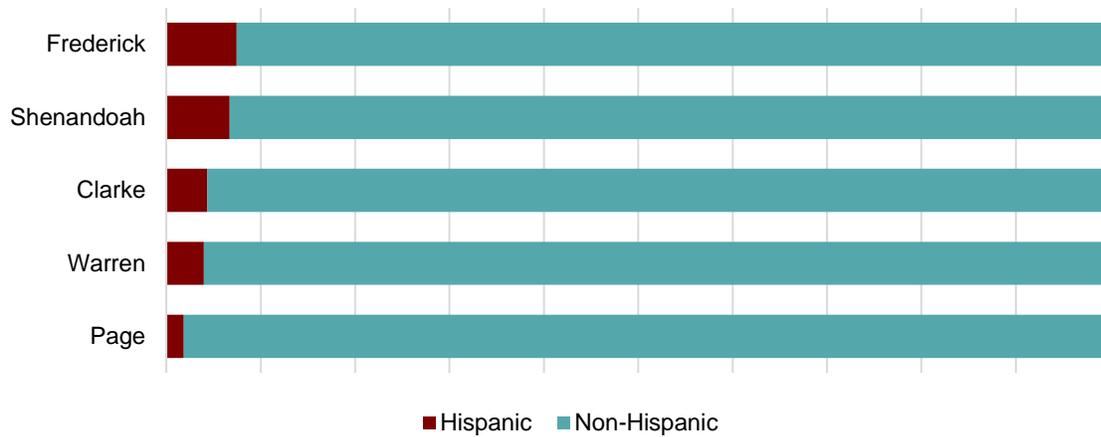
<sup>1</sup> US Census Bureau. American Community Survey Annual Population Estimates. 2016. Table PEPAGESEX.

Figure 2. Racial Composition by County



All of the Northern Shenandoah Valley localities are predominantly white, with Clarke having the most racial diversity and Page the least. Similarly, each region has a different ethnic makeup. Frederick has the largest proportion of Hispanic residents, and Page has the least.<sup>2</sup>

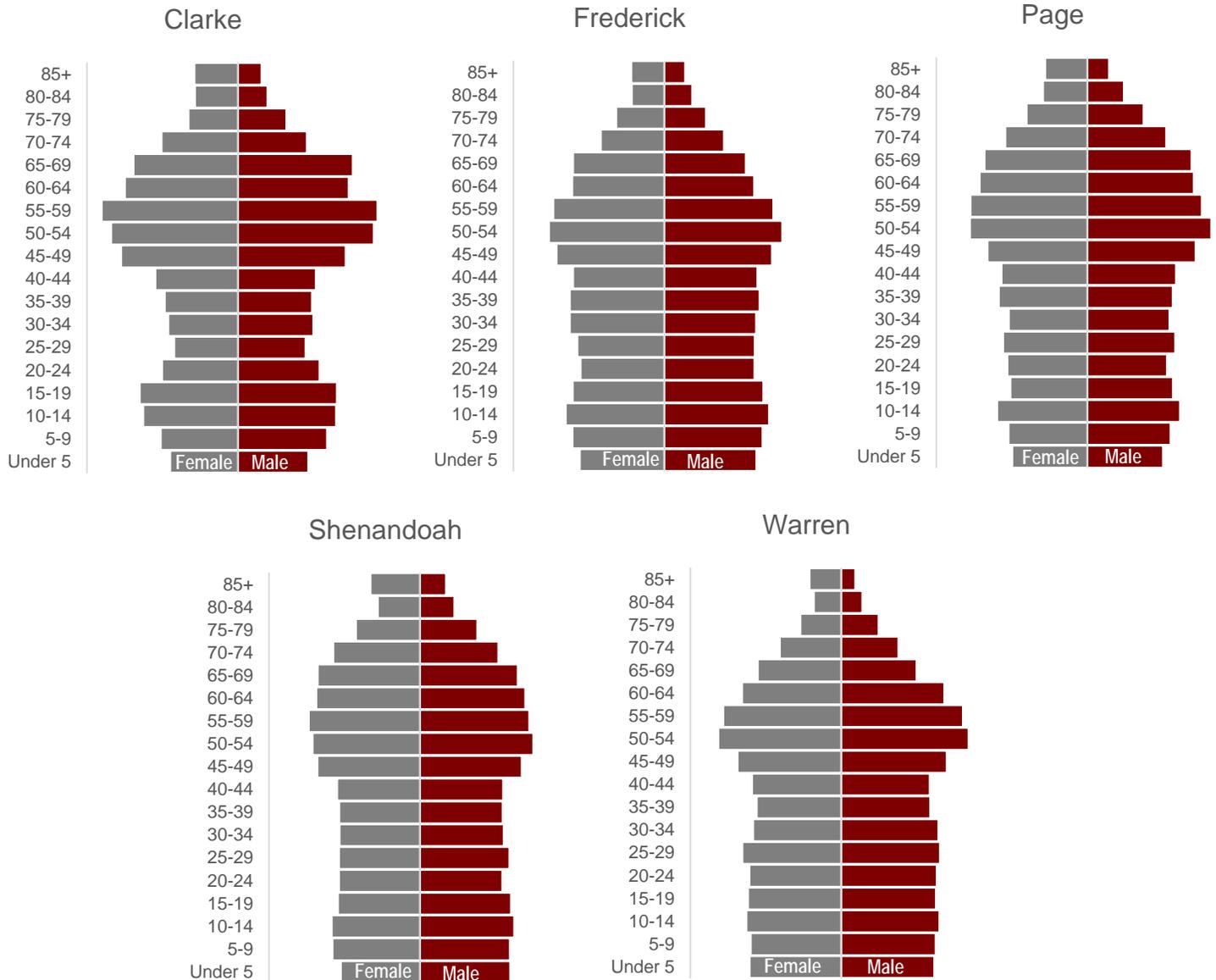
Figure 3. Hispanic Composition by County



<sup>2</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table B03002.

The age distribution also shows a different demographic in each county.<sup>3</sup> Frederick County is the youngest with a median age of 40.3 years, while Clarke is the oldest at 45.4 years.<sup>4</sup> Shenandoah and Page are more evenly distributed across age groups, but all counties in the Northern Shenandoah Valley have a significant population of baby boomers, much like the Northern Piedmont and Southwest Virginia regions of the People Inc. service area.

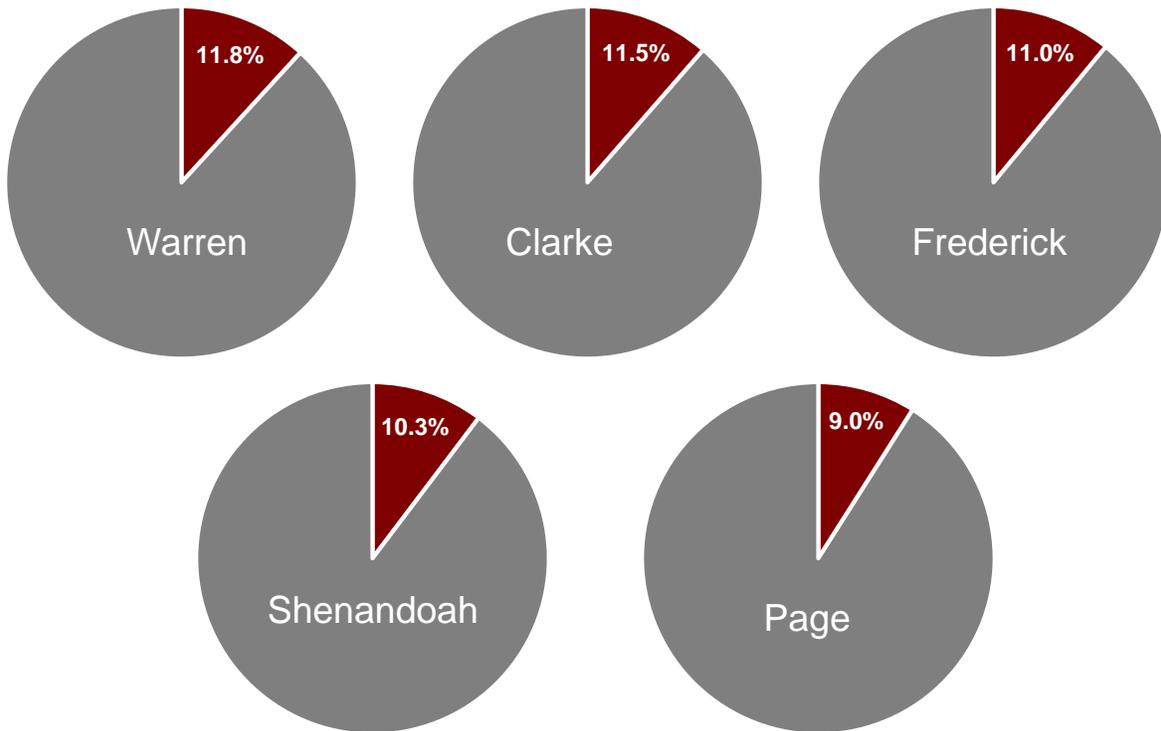
Figure 4. Population Pyramid by County



<sup>3</sup> US Census Bureau. American Community Survey. 2016 Population Estimates. Table PEPAGESEX.

<sup>4</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table DP05.

Figure 5. Veteran Population by County



Veterans comprise the largest portion of the population in Warren and Clarke Counties. The most common period of service for veterans in the Northern Shenandoah Valley is the Vietnam era (35.95%), followed by pre-2001 gulf war era (22.1%). Almost 17,000 veterans live in the NSV.<sup>5</sup>

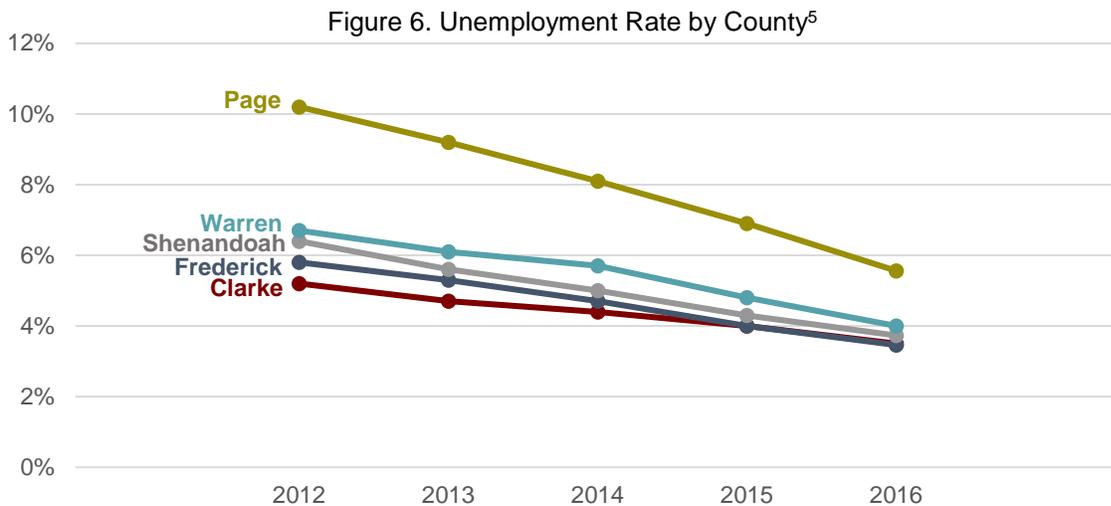
<sup>5</sup> US Census Bureau. American Community Survey. 2012-2016 Estimates. Table S2101.



# III. Jobs, the Economy, and Financial Growth

## Employment

The unemployment rate in the Northern Shenandoah Valley region has continued to decline post-recession. As of 2016, all counties had an unemployment rate at or below the state average of 4%, except for Page County which remains at 5.6%.<sup>6</sup>



Even though unemployment has decreased in the last five years, partners and community members in the Northern Shenandoah Valley identified the quantity and quality of jobs when asked to list the top need in their community. Unemployment and underemployment remain a cause and condition of poverty throughout the People Incorporated service area.

**Among survey respondents who have had issues with getting or keeping a job, the largest concerns were no childcare and the number of jobs available.**

Focus group participants at multiple meetings discussed the mismatch between available jobs in the region and the skill sets of job seekers. While local community colleges have partnered with some high schools to begin addressing this gap, training and job coaching from local workforce development providers is needed. Focus group participants also indicated that lack of affordable childcare and transportation affect individuals' ability to achieve reliable employment. The unemployment rate for those below the poverty level is about 10 times as high as for those at or above the poverty level in Clarke, Frederick, and Shenandoah Counties.<sup>7</sup>

17% of community member survey respondents in the Northern Shenandoah Valley indicated that getting or keeping a job had been a problem for them in the last 12 months.

<sup>6</sup> Virginia LMI. Labor Force, Employment, and Unemployment Data. Annual Averages.

<sup>7</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table S2301.

Manufacturing has held the title of largest industry in the Northern Shenandoah Valley in the last ten years, thanks to large manufacturers like George’s Chicken and Trex Company. Manufacturing provides 20% of all employment in the region.

Much like People Incorporated’s other regions, the typically low paying sectors of retail and accommodation and food service saw growth in the Northern Shenandoah Valley over the past decade.

Low-income persons often remain stuck in low-wage positions and need to work multiple jobs to make ends meet for their families. The table below displays the average “living wage” needed to pay for necessities in each county. A living wage is based on the income needed to afford minimum basic needs including food, childcare, health insurance, housing, transportation, and other necessities without budgeting for things that many Americans enjoy like entertainment, meals at restaurants, or vacation.

Figure 7. Top Industry Trends in NSV<sup>7</sup>

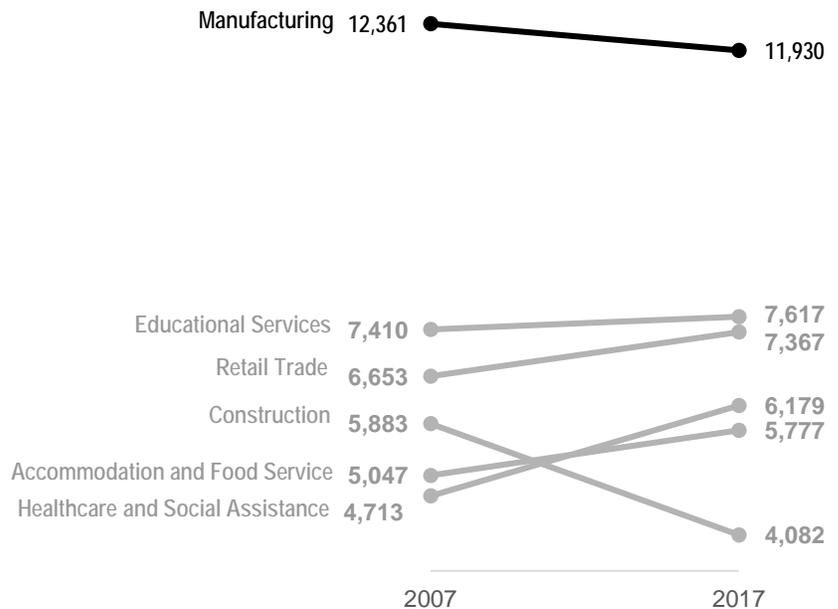


Figure 8. Living Wage by Family Type<sup>9</sup>

| Clarke                                    |                           | Frederick                                 |                           | Page                                      |                           | Shenandoah                                |                           | Warren                                    |                           |
|---|---------------------------|---|---------------------------|---|---------------------------|---|---------------------------|---|---------------------------|
| Two Adults<br>Two Children                | One Adult<br>Two Children |
|   |                           |   |                           |   |                           |   |                           |   |                           |
| \$17.81/hour<br>Full-time for both adults | \$30.33/hour<br>Full-time | \$15.53/hour<br>Full-time for both adults | \$28.47/hour<br>Full-time | \$14.71/hour<br>Full-time for both adults | \$26.83/hour<br>Full-time | \$15.06/hour<br>Full-time for both adults | \$27.52/hour<br>Full-time | \$15.62/hour<br>Full-time for both adults | \$28.65/hour<br>Full-time |

Achievement of employment that provides a living wage often comes with increased education and technical knowledge. The development of skills and experience needed for higher paying jobs was a concern voiced by all stakeholder groups we surveyed. In Virginia, an adult with a high school diploma or equivalent has median annual earnings of \$29,730, while an individual with a bachelor’s degree earns \$55,856.<sup>10</sup>

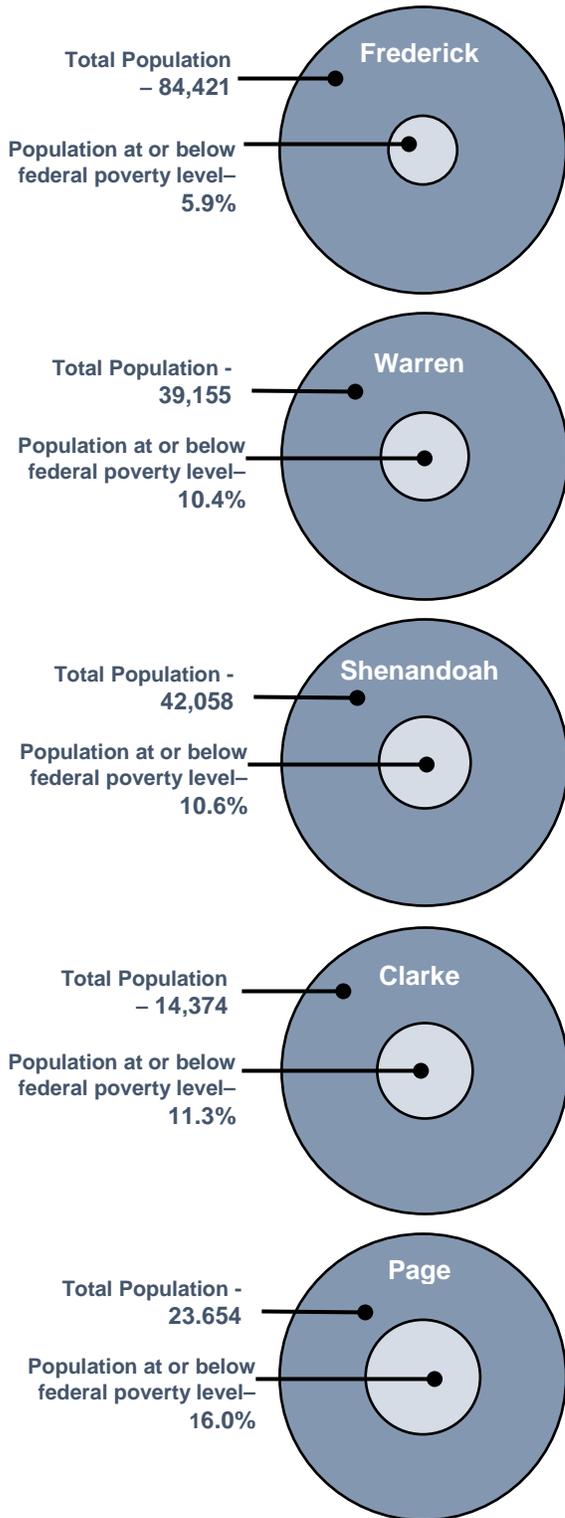
<sup>8</sup> Virginia Employment Commission. Quarterly Census of Employment and Wages. 2<sup>nd</sup> Quarter 2017.

<sup>9</sup> MIT Living Wage Calculator. 2017.

<sup>10</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table B20004.



Figure 9. Poverty Rates



## Poverty

The rate of poverty varies greatly across the Northern Shenandoah Valley. Only 5.9% of the population in Frederick County lives at or below the federal poverty threshold, but that number is 16% in Page County, which is well over the state rate of 11.4%. **Over 18,000 people in the Northern Shenandoah Valley region are living in poverty, with about 5,400 of them children.**<sup>11</sup>

In line with state and national trends, racial minorities are more likely to live in poverty than white individuals in the Northern Shenandoah Valley. Poverty rates are also higher for females than males in each county.<sup>12</sup> Poverty rates by race, ethnicity, and gender are in Appendix E.

Standardized federal poverty levels determine eligibility for many state and federal assistance programs including Medicaid, Affordable Housing Vouchers, Head Start, Supplemental Nutrition Assistance Program (SNAP), free and reduced school lunch, and weatherization assistance.

For 2018, the federal poverty levels (FPL) by households size are:

|          |                  |
|----------|------------------|
| 1 Person | \$12,060         |
| 2 People | \$16,240         |
| 3 People | \$20,420         |
| 4 People | \$24,600         |
| More     | Add \$4,180 each |

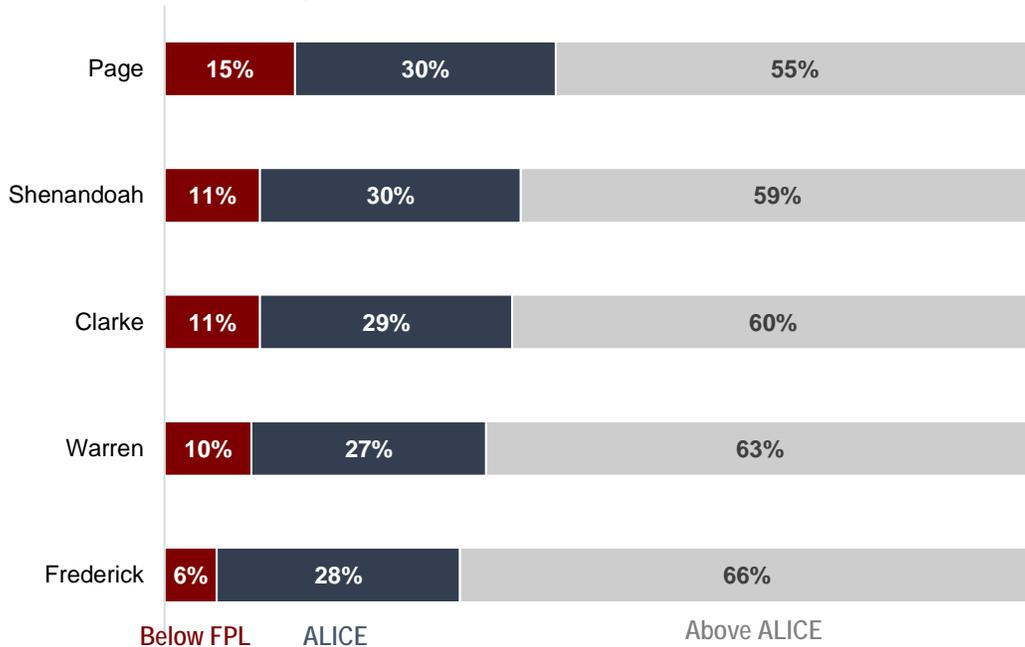
These levels are far below the living wage levels indicated in the previous section, meaning that individuals and families who live above the federal poverty level but below a living wage may be in desperate need of assistance but ineligible for safety net programs.

<sup>11</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table DP03.

<sup>12</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table S1707.

The United Way has spearheaded research on these individuals, which they label “ALICE” – asset limited, income constrained, employed. While 11% of Virginians fell below the federal poverty threshold in 2015, 39% fell below the ALICE threshold.<sup>13</sup>

Figure 10. ALICE Household by County



Using the FPL can be misleading when over one-third of families are, in reality, struggling to get by in People Incorporated’s Northern Shenandoah Valley service area.

Another way to look at income distribution is through median annual household income. Clarke and Frederick have median household incomes around \$70,000, while Page lags behind at \$45,030 and Shenandoah at \$50,450.<sup>14</sup>

Figure 11. Median Annual Household Income by County



<sup>13</sup> United Ways of Virginia. 2017. “ALICE: Asset Limited, Income Constrained, Employed. Virginia.”

<sup>14</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table DP03

# Transportation

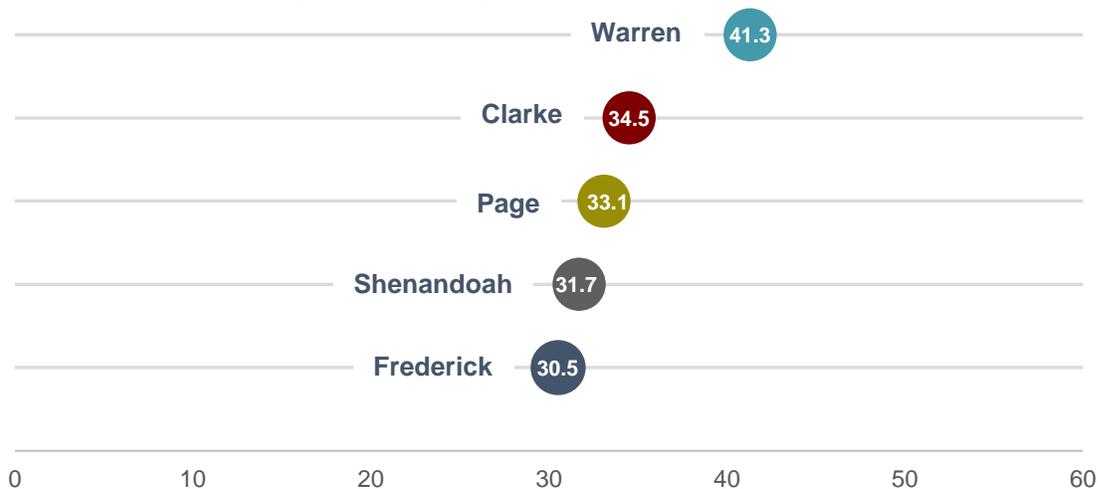
Transportation came out as a top issue in survey and focus group data for the Northern Shenandoah Valley. According to focus group feedback:

- Transportation is a lynchpin for addressing other problems low-income individuals face
- The limited bus service is only available to certain groups
- Transportation impacts ability to access social services, healthcare, and employment

Eleven percent of community survey respondents in the NSV said they did not have reliable transportation. Reliable transportation is crucial to maintaining stable employment, but also effects the ability to attend regular medical appointments.

Commute times in the Northern Shenandoah Valley are less than in People Incorporated's Northern Piedmont and Greater Prince William service areas, but longer than those in Southwest Virginia.<sup>15</sup> Long commute times may just seem like an inconvenience, but a recent Harvard study shows that the longer an average commute time in a given county, the less likely it is that a low-income family will experience upward economic mobility.<sup>16</sup>

Figure 12. Average Commute Time in Minutes



For most of the Northern Shenandoah Valley, a personal vehicle is the only available means of transportation for work, medical appointments, and basic errands. In Clarke County, 5.6% of households (313) have no vehicle available. In Shenandoah it's 5.2% (900 households), 5.2% in Warren (742), 3.8% in Page (363), and 3.6% in Frederick (1,075 households).<sup>17</sup>

<sup>15</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table DP03

<sup>16</sup> Chetty, Raj, Nathaniel Hendren, Patrick Kline, and Emmanuel Saez. 2014. "Where is the Land of Opportunity? The Geography of Intergenerational Mobility in the United States."

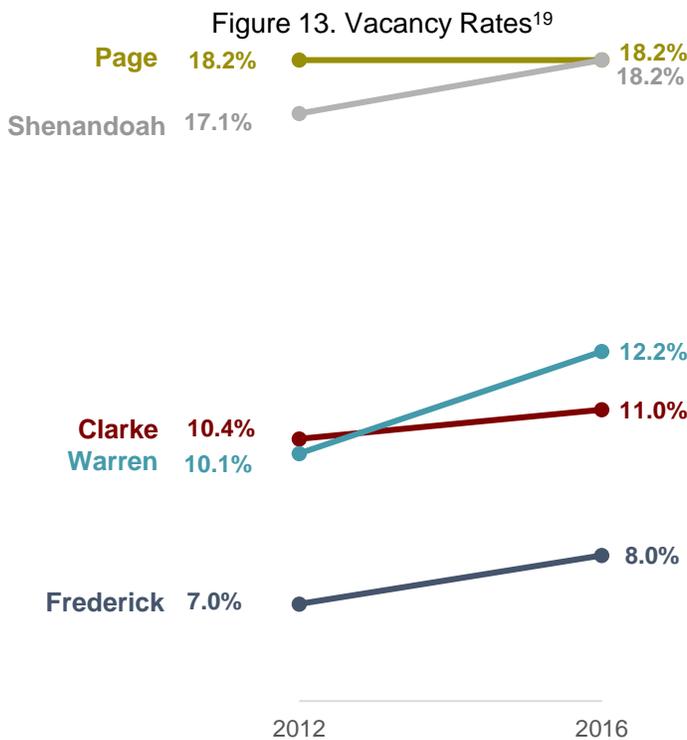
<sup>17</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table B08201.

# IV. Housing

Housing was the top individual and community need listed by community members in the Northern Shenandoah Valley. Housing was, by far, the top community need identified by partners as well; four times as many partners identified housing as the greatest community need as any other issue. Former Governor McAuliffe’s issuance of Executive Order 32 in 2014, to “identify and implement actions to enable quality, affordable housing,” further underlines the need across the commonwealth.<sup>18</sup>

## Housing Quality and Quantity

During focus groups, board members from the Northern Shenandoah Valley discussed the issues of low quality rental units available to low-income individuals. In each county, renter occupied units tend to be older than owner occupied units.<sup>19</sup> This means that renters, who are often lower income, are more likely to face issues that come with old houses, like inadequate weatherization or electrical and plumbing that are not up to current code. Low-income renters often also have fewer options in their price range, and those that are affordable may be low-quality or even unsafe.



### Vacancy rates across the Northern Shenandoah Valley have increased slightly over the past five years.

Even so, the vacancy rate in Frederick County remains low, mirroring those in the Northern Piedmont and Greater Prince William regions. Low vacancy rates can impact low-income families in many ways. When fewer homes are available in a growing geographic area, costs often rise, decreasing the number of affordable homes. Similarly, when few homes are available, families with better credit or rental histories will likely win out over those with less stable finances.

In contrast, rising vacancy rates in rural areas of the region may be a symptom of larger economic and demographic changes. Like many rural places in the country, communities like this are seeing an out-migration to cities where there are more job opportunities. As wealthier individuals move

<sup>18</sup> Virginia Coalition of Housing and Economic Development Researchers. 2017. “Addressing the Impact of Housing for Virginia’s Economy: A Report for Virginia’s Housing Policy Advisory Council.”

<sup>19</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table DP04.

from rural areas into urban cities, lower-income residents are pushed out.<sup>20</sup> Recent research further illustrates that high skill workers are moving to places with high wages, often urban, while low-skill workers are moving away from places where wages are higher because they cannot afford the housing.<sup>21</sup>

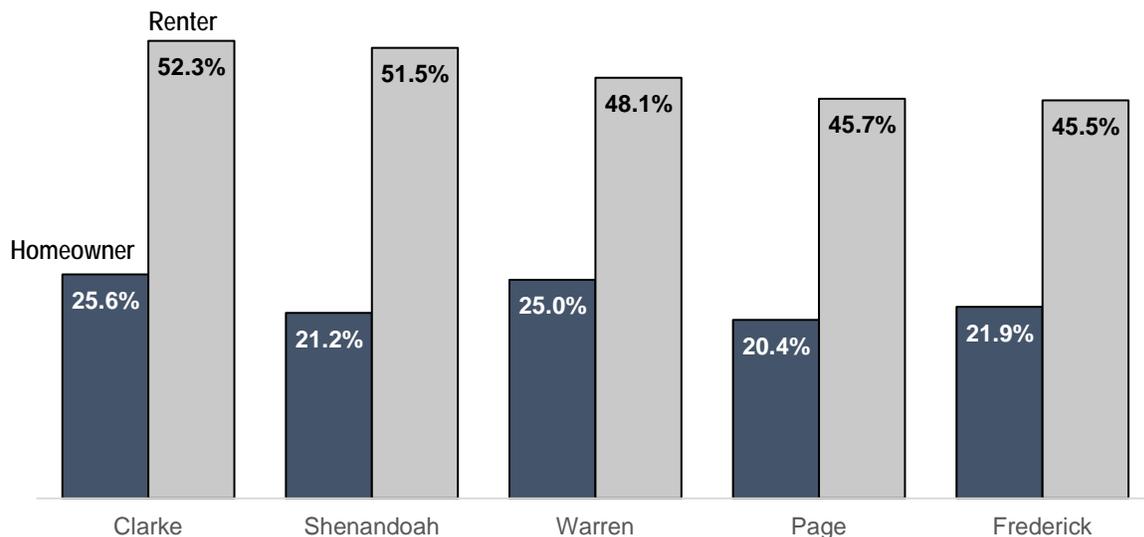
## Affordable Housing

**Thirty-three percent of survey respondents in the NSV region affirmed that they had chosen between paying for housing and paying for other basic needs in the past year.**

When housing costs are too high, families must make the difficult choice of which needs are most important and what needs won't be met that month. A 2017 report to the Virginia Housing Policy Advisory Council found that Virginia has a shortage of affordable housing, and this has major implication for state policy priorities like workforce development, transportation, education, and health.<sup>22</sup>

Almost 1/3 of households in the Northern Shenandoah Valley are housing cost burdened<sup>23</sup>. However, about 50% of renters are housing cost burdened. For families living below, or even a little above, the poverty threshold, housing comprises a much larger proportion of monthly income.

Figure 14. Housing Cost Burdened Households by Type<sup>23</sup>



<sup>20</sup> Blumenthal, Pamela, John McGinty, and Rolf Pendall. 2016. "Strategies for Increasing Housing Supply in High-Cost Cities: DC Case Study." Urban Institute Brief.

<sup>21</sup> Semuels, Alana. 2017. "The Barriers Stopping Poor People From Moving to Better Jobs." *The Atlantic*

<sup>22</sup> Virginia Coalition of Housing and Economic Development Researchers. 2017. "Addressing the Impact of Housing for Virginia's Economy: A Report for Virginia's Housing Policy Advisory Council."

<sup>23</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. TableDP04. For this report, Housing Cost Burdened is defined as spending 30% or more of a household's income on housing.

“With so many commuters raising the cost of living, it’s difficult to make wages to live on when just starting your career. Without the support of family, it would have been impossible for us after having my son.”

- Warren County Community Member

Housing cost-burdened adults are less able to spend their limited funds on necessary medical costs like prescriptions or health insurance. For children, being cost burdened means that a family is less likely to spend their income on child enrichment, which affects economic potential into adulthood. When families are forced to settle for housing that is affordable to them, they may also lose access to other social and cultural resources. High cost communities and neighborhoods often have higher quality K-12 schools. More affordable housing is often in less desirable locations that may be farther from community goods and services like supermarkets, banks, and social service providers.

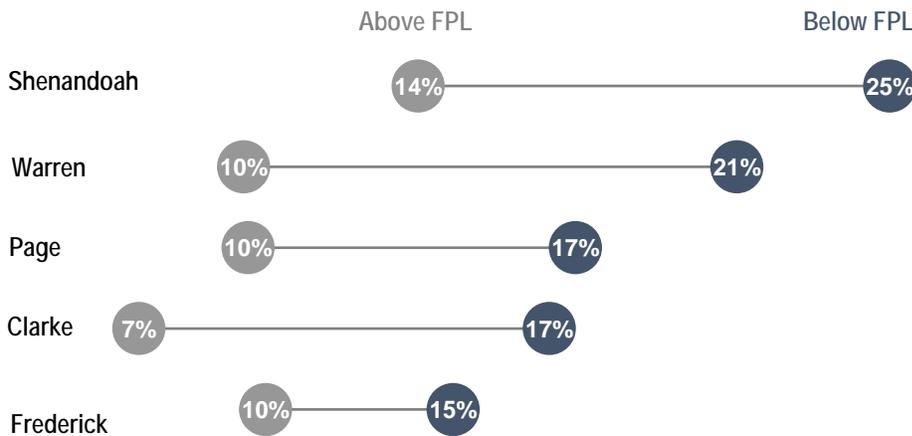
During focus groups, board members and partners emphasized that income in the region is not rising as fast as housing costs.

## Mobility

Low-income individuals also move residences at a higher rate than their higher income counterparts. In the Northern Shenandoah Valley, like most of the People Incorporated service area, individuals living below the federal poverty level are almost twice as likely to have moved in the past year as those living above the FPL.<sup>24</sup>

When families move due to increasing housing costs, children often move schools, negatively affecting academic performance and social development.<sup>25</sup>

Figure 15. Percentage of Individuals Moved in the Last Year by Poverty Status



<sup>24</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table B07012.

<sup>25</sup> Roy, Joydeep, Melissa Maynard, and Elaine Weiss. 2008. “The Hidden Costs of the Housing Crisis.” The Partnership for America’s Economic Success.

## Homelessness

Measuring the number and characteristics of homeless individuals in a community is a difficult process. The data here represent the Point-in-Time (PIT) count method used by the Department of Housing and Urban Development. For the PIT method, service provider work to count the literally homeless individuals in emergency shelter, transitional housing, or unsheltered.<sup>26</sup>

Figure 16. Homeless individuals



While the point-in-time count does capture a portion of households who do not have permanent housing, it misses individuals and families that might be staying with friends until they can afford a deposit on their place or those who are living in week to week hotel rooms. **Fourteen percent of NP respondents to the community member survey had shared housing with another household to avoid being homeless in the past year.**

<sup>26</sup> Western Virginia Continuum of Care. January 2017 Point in Time Count Results.

# V. Education

Survey and focus group respondents mentioned the need for education in various ways.

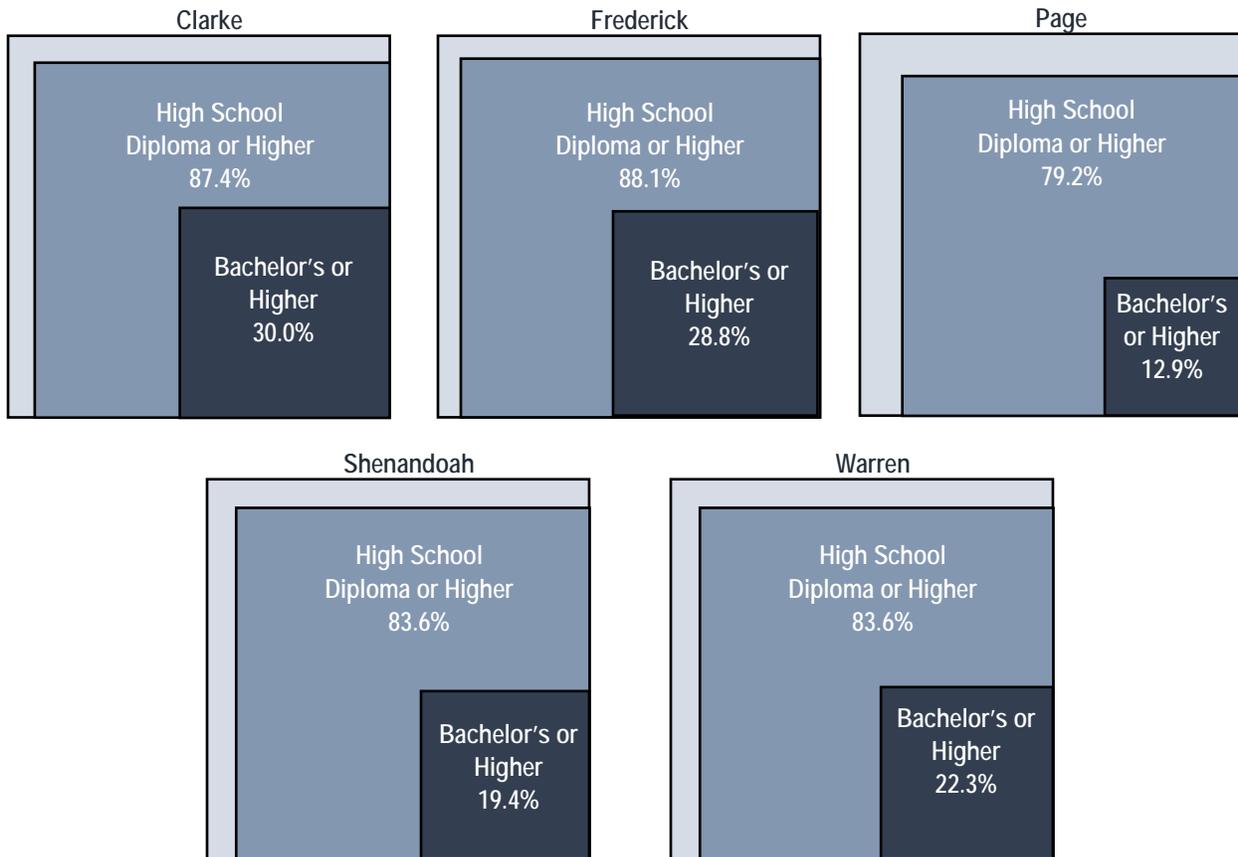
**Primary were the need for technical and workforce education targeted to higher paying jobs and affordable educational opportunities.**

Partners and board members recognized the importance of workforce and technical education as a path to greater earnings for low-income individuals. In some NSV localities, high schools and community colleges have collaborated to further these efforts.

## Educational Attainment

Educational attainment varies across the region. Clarke has the largest proportion of residents with bachelor's degrees, but Frederick has the highest proportion of high school graduates.<sup>27</sup>

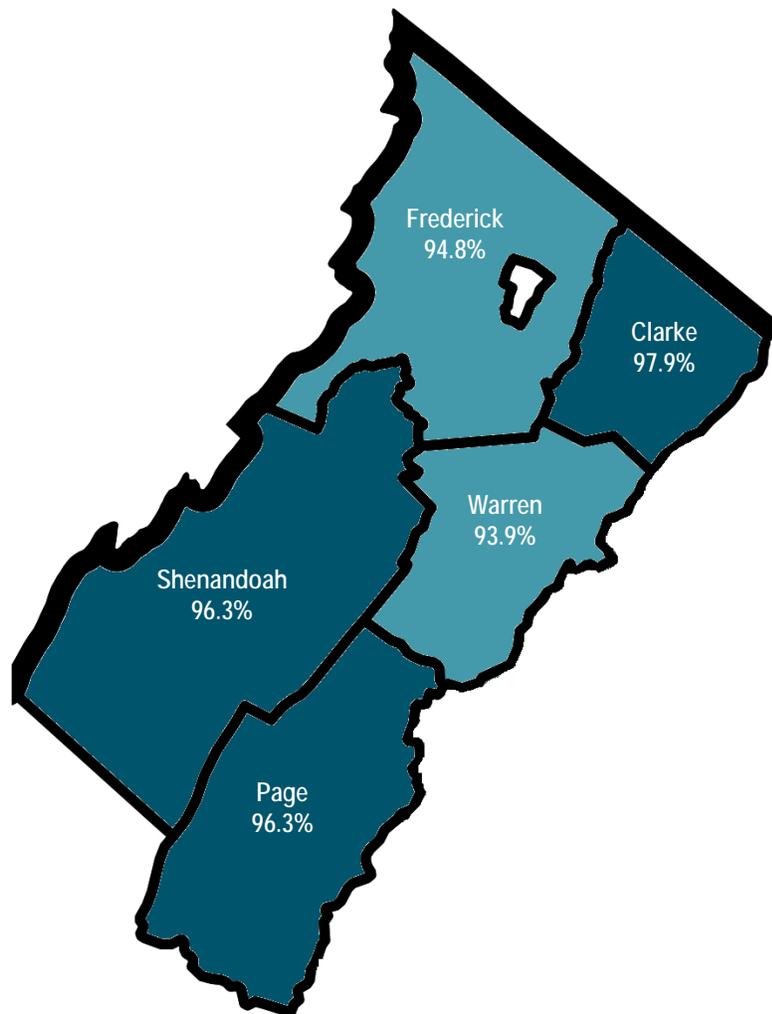
Figure 17. Educational Attainment<sup>26</sup>



<sup>27</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table S1501.

Graduating high school on time has a large impact for both the individual's lifetime earning potential and for the economy. In Warren County, median annual earnings for someone who did not graduate high school are \$25,360 and \$33,718 for someone with a high school diploma.<sup>28</sup> Similarly, the unemployment rate for dropouts in Virginia is 1.5 times higher than that for high school graduates. **On time high school graduation rates range from a low of 93.9% in Warren County to 97.9% in Clarke.**<sup>29</sup> These rates are the highest of all People Incorporated's regions.

Figure 18. On-time High School Graduation Rate



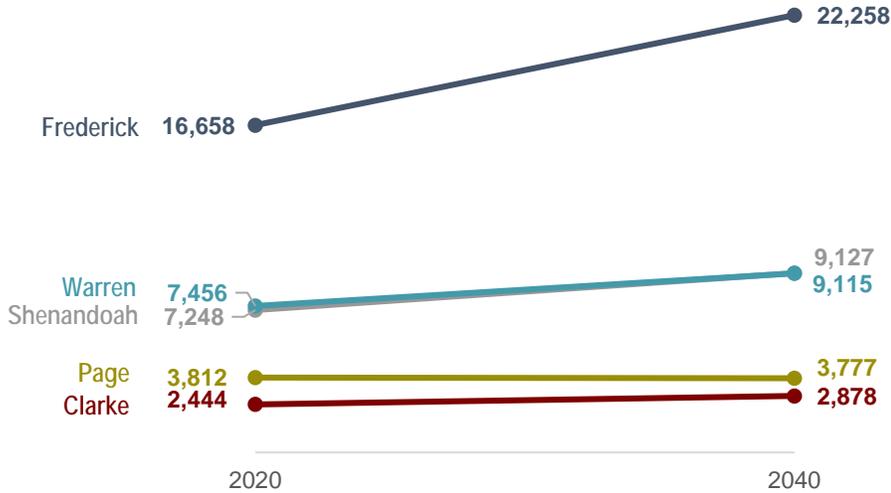
<sup>28</sup> US Census Bureau. American Community Survey. 2012-2016 5-year estimates. Table S1501

<sup>29</sup> Virginia Department of Education. State Level Cohort 4-Year Report 2017

# VI. Children and Youth

Almost 45,000 children live in People Incorporated’s Northern Shenandoah Valley service area.<sup>30</sup> The population of children under 15 is expected to grow by about 10,000 from 2020 to 2040.<sup>31</sup>

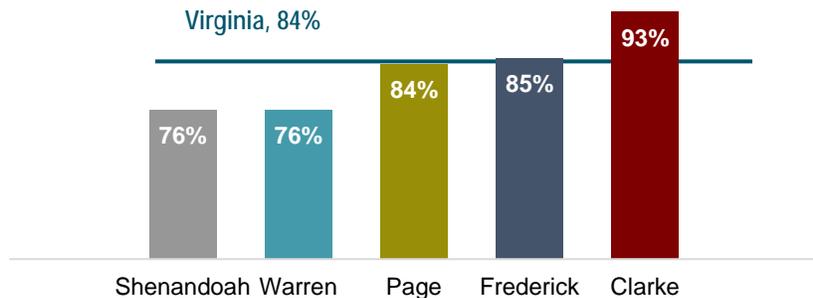
Figure 19. Population growth for children under 15



## Kindergarten Readiness

Entering school ready to learn can have significant long-term benefits for children on education, employment, earnings, marriage, and health.<sup>32</sup> For the 2017-2018 academic year, 84% of children in Virginia entered kindergarten with appropriate reading levels. Readiness varied among counties, with Shenandoah and Warren having the smallest percentage of ready children and Clarke County the largest.<sup>33</sup>

Figure 20. 2017 Kindergarten Readiness Rates



<sup>30</sup> US Census Bureau. American Community Survey. Annual Population Estimates. 2016. Table PEPAGESEX.

<sup>31</sup> Demographics Research Group of the Weldon Cooper Center for Public Services. June 2017.

<sup>32</sup> Heckman, James, Rodrigo Pinto, and Peter Svlyev. 2013. “Understanding the Mechanisms Through Which an Influential Early Childhood Program Boosted Adult Outcomes.” *American Economic Review* 103(6).

<sup>33</sup> Virginia Department of Education. PALS-K for fall 2018 kindergarten entry.

## Childcare

According to board and partner focus groups, affordable childcare and early childhood education are top needs in the region. Top concerns related to childcare fall in to the following categories:

- **Affordability of care**

While the Virginia Department of Social Services does provide subsidies for childcare to low-income families, issues remain with the number of centers who are willing to accept the vouchers and for families that make too much to qualify for subsidies, but too little to afford quality childcare. In some areas, families who may qualify still cannot get subsidies because of the waitlist.

As of February 2018, only 27% of the registered childcare providers in the Northern Shenandoah region accept subsidies, and only 25% provide full time care and accept subsidies.<sup>34</sup> The average cost of childcare in Virginia is 43% of the median earnings for someone with a high school diploma.<sup>35</sup> Spending almost half of one's income on childcare leaves little left to pay for housing, food, and other basic needs.

In Virginia, center-based childcare costs an average of **\$12,792** a year for one infant.

For an infant and a 4-year old, the cost jumps to **\$22,360** a year.<sup>34</sup>

- **Availability of care**

Availability of childcare is an issue in many cities across the country experiencing population growth and in rural communities with few providers. In the Northern Shenandoah Valley, 47% of registered providers offer full-time licensed care. However, there are even less care providers for newborns less than one-year old. Only 27% of providers offer licensed newborn care.

Title I preschool and the Virginia Preschool Initiative have greatly expanded care for four-year-olds across the state. In the fall of 2017, 491 children under five were enrolled in preschool programs at public schools across the region.<sup>36</sup> Publicly available preschool at no cost to parents is a step in the right direction to addressing the affordability and availability needs related to childcare and early childhood education.

Even with existing efforts at improving childcare access, a large gap still remains between the number of children needing care and the number of available childcare slots with qualified providers. According to 2016 US Census Bureau estimates, about 11,500 children under age five live in the Northern Piedmont service area.<sup>37</sup> If all 4,907 registered provider slots are filled, and an additional 491 children are in public preschool, that still leaves about **6,000 children without registered care in the Northern Shenandoah Valley service area**. Some of these families may not have their children in a center by choice, while others may rely on friends or family, or use unregulated and unregistered providers because it's the only affordable option.

---

<sup>34</sup> Virginia Department of Social Services. Child Day Care. Searched February 2018.

<sup>35</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table S1501. Childcare Aware of America. "Parent and the High Cost of Child Care: 2017 Report."

<sup>36</sup> Virginia Department of Education. Fall 2017 Membership Data.

<sup>37</sup> US Census Bureau. American Community Survey 2016 Annual Population Estimates. Table PEPAGESEX.

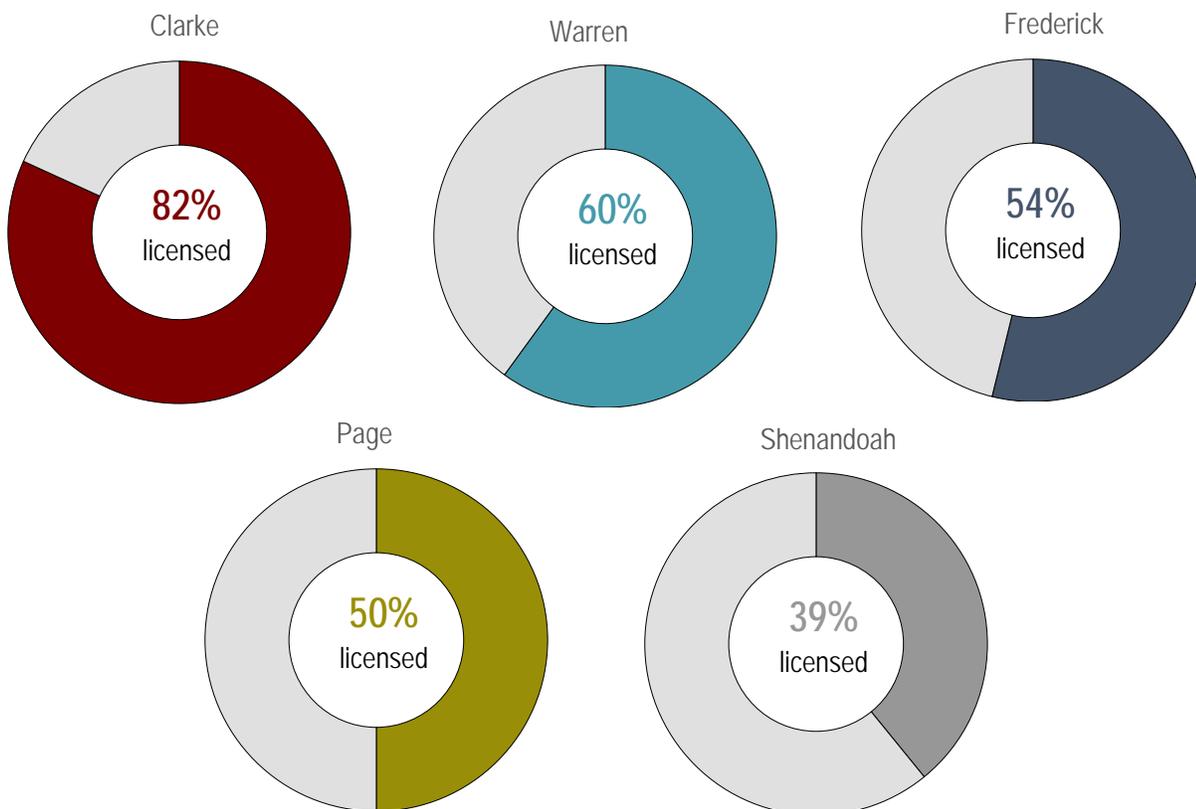
- **Conflict between care schedules and employment schedules**

Focus group and survey respondents commented on the **lack of childcare for individuals who work other than traditional work hours**. This may include manufacturing workers or healthcare professionals who work nights, or those who work retail or restaurant jobs that might have evening shifts. When extended childcare hours are available, they often cost more than standard daytime hours.

- **Licensing and quality of care**

In the Northern Shenandoah Valley, **54% of providers registered with the Department of Social Services are licensed**.<sup>38</sup> One of the largest providers of unlicensed care are religious institutions that are classified as “religious exempt.” Thirty-seven percent of registered centers in the NSV are religious exempt. These centers are not subject to the same regulation and inspection standards as licensed facilities. Recent federal legislation expanded requirements for religious exempt centers that receive subsidies in an attempt to improve quality and accountability. NSV focus group participants specifically identified that centers in church basements struggle to meet childcare standards.

Figure 21. Proportion of Registered Child Day Care Providers with a License



<sup>38</sup> Virginia Department of Social Services. Child Day Care. Searched February 2018.

Virginia has implemented multiple initiatives and programs with the goal of improving the quality of child care and early childhood education in the state. The Virginia Quality program is a voluntary quality rating and improvement system that provides support to all types of providers that seek to improve that quality of care. Families can use the Virginia Quality website to explore the quality of participating providers in the domains of basic health and safety, education and qualifications, curriculum and assessment, and environment and interactions.<sup>39</sup> The Virginia Department of Social Services and The Virginia Early Childhood Foundation jointly administer the Virginia Quality program.

The Virginia Early Childhood Foundation also heads the statewide Smart Beginnings network. Smart Beginnings works to build partnerships and systems change to increase capacity to provide quality early childhood development at the local level. Smart Beginnings programs exist in all localities served by People Incorporated.

Even with these, and other, initiatives, access to care that is both high quality and affordable remains a barrier to many families.

## Head Start Supplemental Info

### Eligibility Estimates

As a Head Start and Early Head Start grantee, People Incorporated reports on data specific to the needs of low-income children and families in our service area related to child care and early childhood education. This section outlines those data points as specified by the Head Start Program Performance Standards.

For each locality, estimates of eligible Head Start and Early Head Start children are presented as a range, based on methodology.<sup>40</sup>

Figure 22. Estimated Number of Head Start Eligible Children

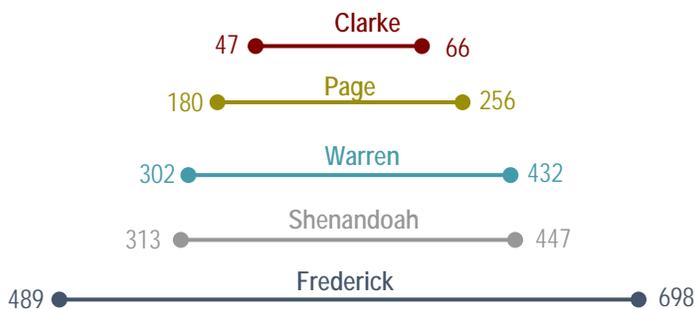
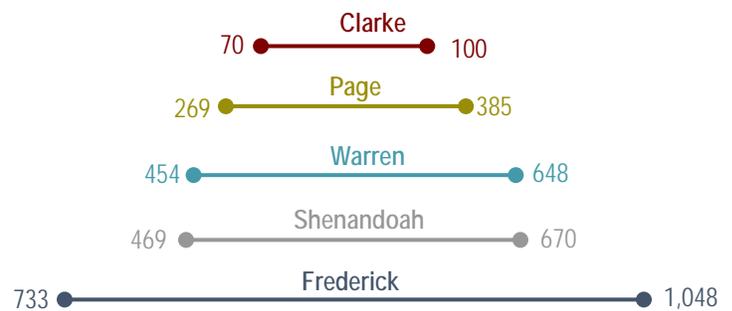


Figure 23. Estimated Number of Early Head Start Eligible Children



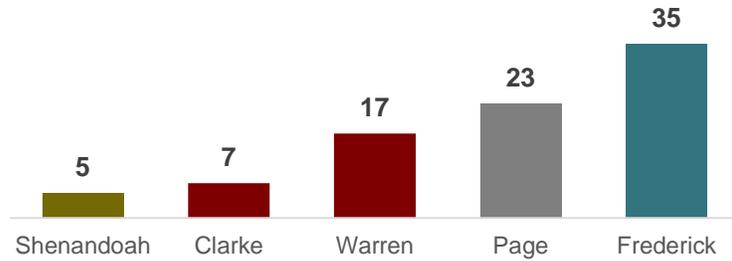
<sup>39</sup> Virginia Quality. Virginia Department of Social Services. [www.virgininaquality.com](http://www.virgininaquality.com)

<sup>40</sup> The authors of this report used the Free Lunch Method to estimate the number of children eligible for Head Start and Early Head Start services. Details on this method are found in Appendix J.

## Foster Care

In the Northern Shenandoah Valley, **87 children were in foster care as of January 1, 2018**. Of all of People Incorporated's regions, NSV has the fewest number of children in foster care, despite being almost the largest geographically (only 200 square miles smaller than Southwest Virginia).

Figure 24. Children in Foster Care as of January 1, 2018



# VII. Nutrition, Health, and Wellness

## Substance Abuse and Mental Health

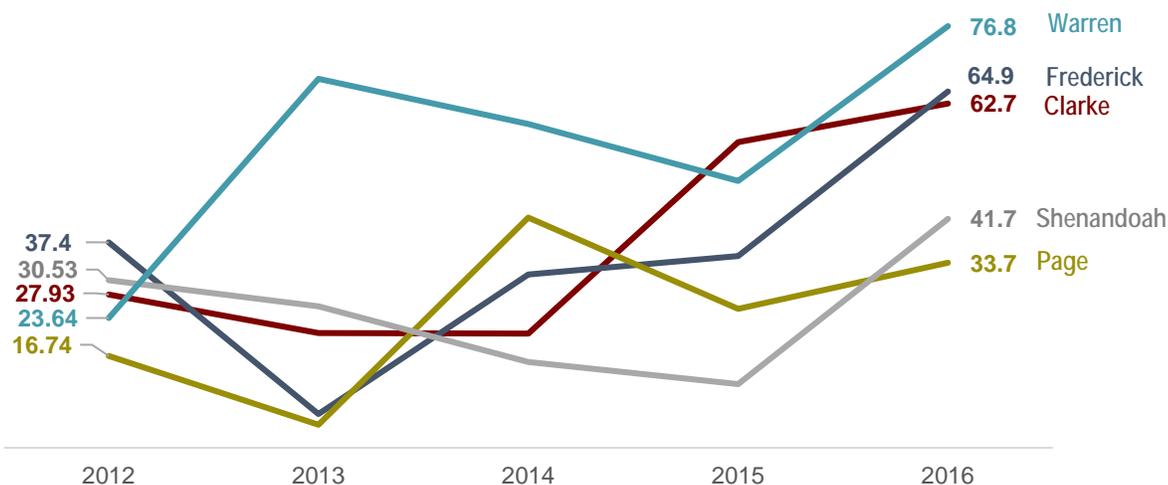
Community members identified mental health and substance abuse issues as one of the underlying causes of poverty in the Northern Shenandoah Valley. Here are just a few of the exact words used by survey respondents when asked to identify the single greatest need in their community:

- Community Members
  - “Rehabilitation programs for drug and alcohol addiction.”
- Partners
  - “Stopping the drug epidemic”
  - “Mental health services for children under the age of 18”
  - “Treatment for mental illness and substance abuse”
- Staff
  - “adequate substance abuse treatment for poor, uninsured”

In just the past few years, opioid abuse has come to the top of concerns for communities because of its direct impact on health, employment, child development, homelessness, and overall financial wellbeing. **For Americans under 50, drug overdose is now the leading cause of death**<sup>41</sup>. Based on the feedback we received, mental health services and substance abuse services are joint needs that must be addressed simultaneously.

**Since 2012, the rate of Narcan administration by EMS has risen in every county.**<sup>42</sup>

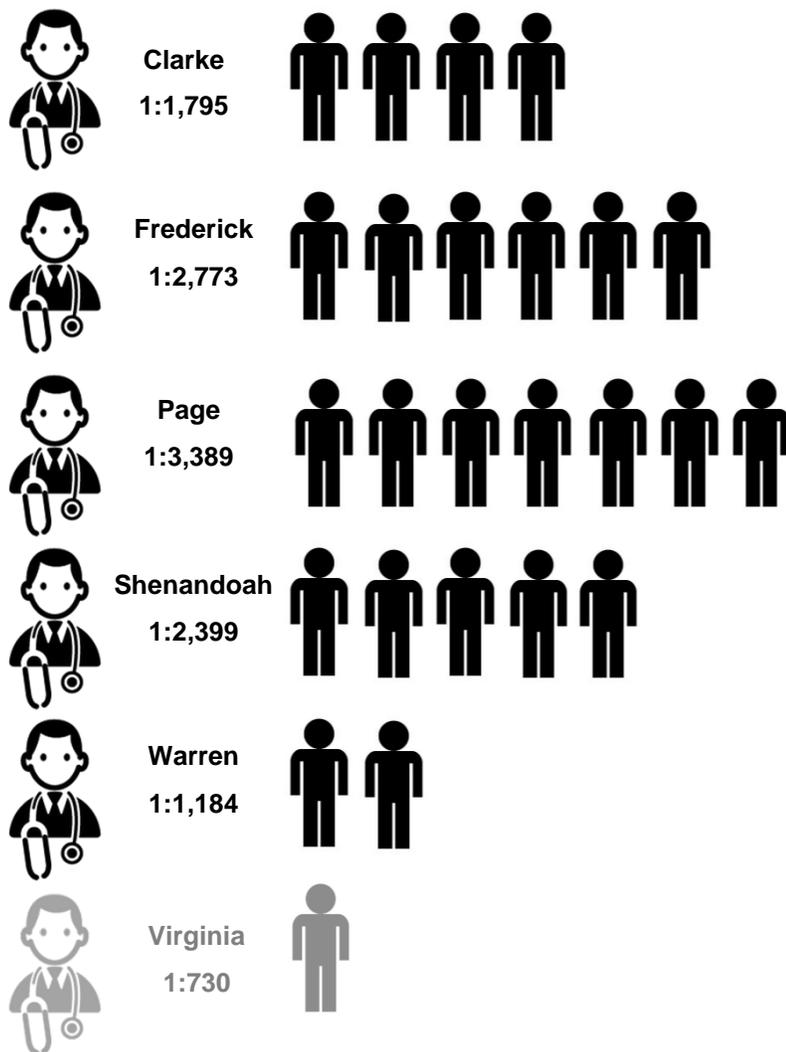
Figure 25. EMS Narcan Administration Rate



<sup>41</sup> National Institutes of Health. Initiative to Help End the Opioid Crisis. [www.nih.gov/opioid-crisis](http://www.nih.gov/opioid-crisis). Accessed Feb 2018.

<sup>42</sup> Virginia Department of Health. Opioid Indicators Dashboard. Accessed Feb 2018. Rates in Figure 23 are per 100,000 individuals.

Figure 26. Ratio of Residents per Mental Health Provider



Focus group participants in the Northern Shenandoah Valley discussed the extreme lack of substance abuse and mental health services to meet the growing need. Current mental health offices, particularly those that offer affordable care, are overwhelmed with the current demand.

**The number of residents per mental health providers is 1,714 in the region, which is more than twice the state rate.<sup>43</sup>**

Individuals recovering from substance abuse need intensive care and support. Assistance with housing, food, and life skills are essential to continuing sobriety. This is especially true for special populations including those recently incarcerated, those with physical disabilities, and those with concurrent medical and mental health illness. While about half of individuals with substance abuse issues participate in treatment programs while in prison, only one-quarter are still receiving those services eight to ten months after release.<sup>44</sup> Individuals with physical and sensory disabilities may have

difficulty getting treatment because of facility accessibility or lack of staff who are trained to work with visually or hearing impaired clients.<sup>45</sup>

It is also important to note that mental health care for children and youth is an aspect of this need. **Of survey respondents who had children, 32% said they'd experienced emotional and behavioral problems with their children in the last 12 months.**

<sup>43</sup> County Health Ranking and Roadmaps. 2016 NPI Registry.

<sup>44</sup> Mallik-Kane, Kamala and Christy Visher. 2008. "Health and Prisoner Reentry: How Physical, Mental, and Substance Abuse Conditions Shape the Process of Reintegration." *Urban Institute Justice Policy Center*.

<sup>45</sup> Substance Abuse and Mental Health Services Administration. 2011. "Substance Use Disorders in People with Physical and Sensory Disabilities." *In Brief* (6):1.

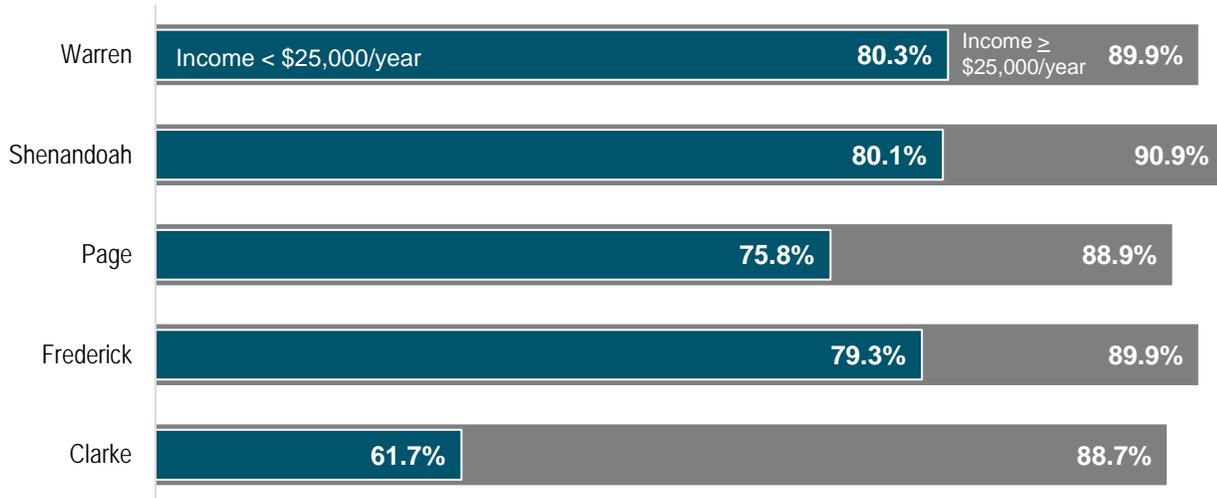
## Affordable Health and Dental Care

When asked to score the importance of over 20 needs, Northern Shenandoah Valley community members scored affordable health and dental care as highest.

Access to affordable healthcare is especially important for those who are not covered by safety net programs and cannot access or afford insurance coverage through their employer or the marketplace.

**Rates of insurance coverage are much lower among households making less than \$25,000 a year.<sup>46</sup>**

Figure 27. Insurance Coverate Rates

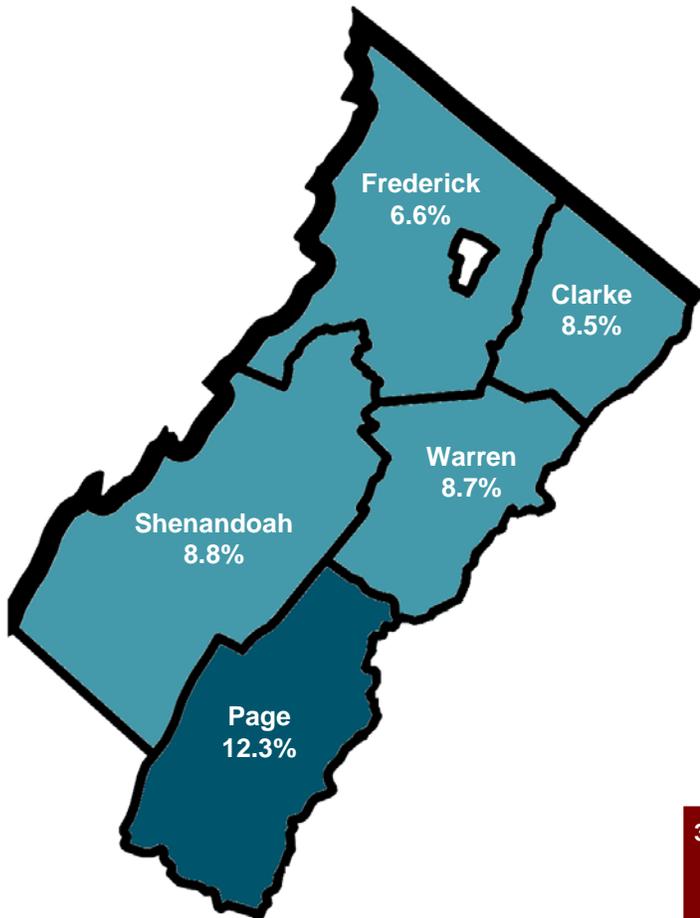


<sup>46</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table S2701.

## Nutrition

Eleven percent of respondents to the community member survey said they have gone hungry in the past 12 months, despite the fact that 47% receive Supplemental Nutrition Assistance (SNAP) and 29% have used food banks or pantries.

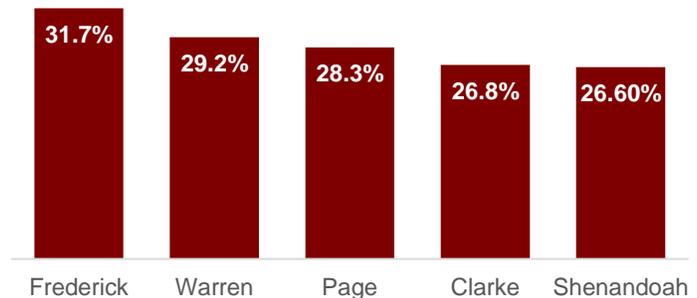
Figure 28. Food Insecurity Rate by County



**16,580 individuals in the Northern Shenandoah Valley are food insecure<sup>47</sup>**, including over 6,000 households who receive SNAP benefits.<sup>48</sup> Food insecure families lack access to enough food for active, healthy lifestyles and have limited availability of nutritionally adequate food.

Access to affordable healthy food has health impacts. Obesity rates across the United States have a close relationship with poverty, though it varies greatly by race and gender.<sup>49</sup> In the United States, women who live below 130% of the federal poverty level are significantly more likely to be obese than those who are less poor. A similar relationship exists for children and adolescents. According to data from the CDC, "low income children and adolescents are more likely to be obese than their higher income counterparts."<sup>50</sup>

Figure 29. Adult Obesity Rates<sup>51</sup>



<sup>47</sup> Feeding America. Map the Meal. 2015 Data.

<sup>48</sup> US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table DP03.

<sup>49</sup> Desilver, Drew. 2013. "Obesity and poverty don't always go together." Pew Research Center.

<sup>50</sup> Ogden, Cynthia, Molly Lamb, Margaret Carroll, and Katherine Flegal. 2010. "Obesity and Socioeconomic Status in Children and Adolescents: United States 2005-2008." NCHS Data Brief No. 51.

<sup>51</sup> Centers for Disease Control and Prevention. Diabetes Atlas. 2013 Data

# Appendices

## Appendix A. Demographic Statistics by County

|                                       |  | Clarke | Frederick | Page   | Shenandoah | Warren | Northern Shenandoah Valley Total |
|---------------------------------------|--|--------|-----------|--------|------------|--------|----------------------------------|
|                                       | Total Population                         | 14,038 | 78,584    | 24,053 | 42,058     | 37,515 | <b>196,248</b>                   |
| <b>Racial and Ethnic Distribution</b> | Percent White Alone                      | 81.17% | 91.24%    | 95.83% | 93.47%     | 90.92% | <b>92.17%</b>                    |
|                                       | Percent Black/African American Alone     | 4.49%  | 4.06%     | 1.60%  | 2.13%      | 3.92%  | <b>3.37%</b>                     |
|                                       | Percent Native American Alone            | 0.41%  | 0.29%     | 0.13%  | 0.04%      | 0.16%  | <b>0.20%</b>                     |
|                                       | Percent Asian Alone                      | 1.09%  | 1.45%     | 0.55%  | 0.56%      | 1.09%  | <b>1.06%</b>                     |
|                                       | Percent Hawaiian/Pacific Islander Alone  | 0%     | 0.07%     | 0%     | 0%         | 0.01%  | <b>0.03%</b>                     |
|                                       | Percent Other Race Alone                 | 2.04%  | 0.89%     | 0.42%  | 0.84%      | 0.54%  | <b>0.84%</b>                     |
|                                       | Percent Two or More Races                | 2.81%  | 2.01%     | 1.47%  | 2.34%      | 3.37%  | <b>2.34%</b>                     |
|                                       | Percent Hispanic of Latino (of any race) | 4.35%  | 7.44%     | 1.84%  | 6.70%      | 3.98%  | <b>5.74%</b>                     |
| <b>Sex</b>                            | Percent Female                           | 50.46% | 50.29%    | 51.02% | 51.07%     | 50.12% | <b>50.52%</b>                    |
| <b>Age</b>                            | Median Age                               | 45.4   | 40.3      | 44.7   | 44.8       | 40.8   |                                  |

Source: American Community Survey: 2016 5-year Estimates. U.S. Census Bureau

## Appendix B. Armed Forces and Veterans Characteristics by County

|                                  |   | Clarke | Frederick | Page  | Shenandoah | Warren | Northern<br>Shenandoah<br>Valley<br>Total |
|----------------------------------|---|--------|-----------|-------|------------|--------|---|
|                                  | Active Duty<br>Military                         | 0      | 50        | 19    | 104        | 18     | 191                                       |
| <b>Veteran Period of Service</b> | Gulf War (2001<br>or later)                     | 7.9%   | 15.8%     | 10.4% | 15.6%      | 16.5%  | 14.73%                                    |
|                                  | Gulf War (1990-<br>2001)                        | 14.6%  | 27.6%     | 10.5% | 15.0%      | 26.8%  | 22.10%                                    |
|                                  | Vietnam Era                                     | 38.0%  | 31.6%     | 41.2% | 41.8%      | 35.3%  | 35.95%                                    |
|                                  | Korean Era                                      | 8.8%   | 7.3%      | 15.3% | 8.8%       | 12.1%  | 9.53%                                     |
|                                  | WWII Era  | 4.4%   | 4.7%      | 5.6%  | 3.1%       | 2.9%   | 4.07%                                     |
|                                  | Veterans as a<br>Percent of Total<br>Population | 11.5%  | 11.0%     | 9.0%  | 10.3%      | 11.8%  | 10.8%                                     |
|                                  | Poverty Rate for<br>Veterans                    | 2.5%   | 3.5%      | 8.5%  | 4.9%       | 2.6%   | 4.1%                                      |
|                                  | Unemployment<br>Rate for Veterans               | 5.4%   | 8.1%      | 1.3%  | 6.2%       | 2.0%   |   |

Source: US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates.  
Tables DP03 and S2101.

## Appendix C. Unemployment Rate by County

|      | <b>Clarke</b> | <b>Frederick</b> | <b>Page</b> | <b>Shenandoah</b> | <b>Warren</b> | <b>Northern<br/>Shenandoah<br/>Valley Total</b> |
|------|---------------|------------------|-------------|-------------------|---------------|---|
| 2012 | 5.2%          | 5.8%             | 10.2%       | 6.4%              | 6.7%          | <b>6.5%</b>                                     |
| 2013 | 4.7%          | 5.3%             | 9.2%        | 5.6%              | 6.1%          | <b>5.9%</b>                                     |
| 2014 | 4.4%          | 4.7%             | 8.1%        | 5.0%              | 5.7%          | <b>5.3%</b>                                     |
| 2015 | 4.0%          | 4.0%             | 6.9%        | 4.3%              | 4.8%          | <b>4.5%</b>                                     |
| 2016 | 3.5%          | 3.5%             | 5.6%        | 3.7%              | 4.0%          | <b>3.9%</b>                                     |

Source: Virginia Employment Commission: Local Area Unemployment Statistics

## Appendix D. Employment and Wages by Industry

|   |                  | Clarke  | Frederick | Page  | Shenandoah | Warren  | Northern Shenandoah Valley Total |
|---|------------------|---------|-----------|-------|------------|---------|----------------------------------|
| Accommodation and Food Service              | # of employees   | 220     | 2,327     | 620   | 1,332      | 1,278   | <b>5,777</b>                     |
|   | Avg. Weekly Wage | \$378   | \$331     | \$259 | \$278      | \$326   | <b>\$312</b>                     |
| Admin, and Support and Waste Management     | #                | 120     | 1,760     | 175   | 334        | 999     | <b>3,388</b>                     |
|   | Avg. Weekly Wage | \$502   | \$527     | \$519 | \$519      | \$705   | <b>\$577</b>                     |
| Agriculture, Forestry, Fishing, and Hunting | #                | 137     | 218       | 49    | 101        | 30      | <b>535</b>                       |
|   | Avg. Weekly Wage | \$627   | \$530     | \$659 | \$563      | \$548   | <b>\$574</b>                     |
| Arts, Entertainment, and Recreation         | #                | 34      | 484       | 543   | 138        | 423     | <b>1,622</b>                     |
|   | Avg. Weekly Wage | \$389   | \$347     | \$593 | \$365      | \$472   | <b>\$464</b>                     |
| Construction                                | #                | 291     | 2,219     | 259   | 710        | 603     | <b>4,082</b>                     |
|   | Avg. Weekly Wage | \$919   | \$894     | \$681 | \$729      | \$855   | <b>\$848</b>                     |
| Educational Services                        | #                | 728     | 3,330     | 703   | 1,329      | 1,527   | <b>7,617</b>                     |
|   | Avg. Weekly Wage | \$717   | \$710     | \$633 | \$655      | \$642   | <b>\$680</b>                     |
| Finance and Insurance                       | #                | 94      | 1,827     | 112   | 249        | 234     | <b>2,526</b>                     |
|   | Avg. Weekly Wage | \$889   | \$870     | \$848 | \$916      | \$1,018 | <b>\$888</b>                     |
| Healthcare and Social Assistance            | #                | 315     | 1,906     | 639   | 1,596      | 1,723   | <b>6,179</b>                     |
|   | Avg. Weekly Wage | \$597   | \$653     | \$684 | \$694      | \$713   | <b>\$681</b>                     |
| Information                                 | #                | 23      | 344       | 23    | 209        | 69      | <b>668</b>                       |
|   | Avg. Weekly Wage | \$1,323 | \$1,121   | \$769 | \$830      | \$811   | <b>\$993</b>                     |
| Management of Companies and Enterprises     | #                | *       | 350       | *     | *          | 56      | *                                |
|   | Avg. Weekly Wage | *       | \$1,597   | *     | *          | \$824   | *                                |

Source: Virginia Employment Commission. Quarterly Census of Employment and Wages. 2<sup>nd</sup> Quarter 2017.

\*Designated "confidential" by the Virginia Employment Commission

## Appendix D. Employment and Wages by Industry continued

|  |                        | Clarke  | Frederick | Page    | Shenandoah | Warren  | Northern<br>Shenandoah<br>Valley Total |
|--|------------------------|---------|-----------|---------|------------|---------|--|
| Manufacturing  | #                      | 687     | 5,881     | 789     | 3,491      | 1,082   | <b>11,930</b>                          |
|  | Avg.<br>Weekly<br>Wage | \$854   | \$1,020   | \$711   | \$811      | \$1,037 | <b>\$930</b>                           |
| Mining, Quarrying,<br>Oil and Gas                      | #                      | *       | 114       | *       | *          | *       | *                                      |
|  | Avg.<br>Weekly<br>Wage | *       | \$914     | *       | *          | *       | *                                      |
| Other Services   | #                      | 238     | 762       | 146     | 510        | 513     | <b>2,169</b>                           |
|  | Avg.<br>Weekly<br>Wage | \$618   | \$603     | \$429   | \$506      | \$551   | <b>\$558</b>                           |
| Professional,<br>Scientific, and<br>Technical Services | #                      | 227     | 895       | 245     | 254        | 297     | <b>1,918</b>                           |
|  | Avg.<br>Weekly<br>Wage | \$1,952 | \$1,203   | \$783   | \$1,226    | \$1,170 | <b>\$1,236</b>                         |
| Public Administration                                  | #                      | 242     | 1,779     | 383     | 721        | 571     | <b>3,696</b>                           |
|  | Avg.<br>Weekly<br>Wage | \$690   | \$1,170   | \$627   | \$754      | \$957   | <b>\$968</b>                           |
| Real Estate and<br>Rental and Leasing                  | #                      | 35      | 182       | 33      | 97         | 75      | <b>422</b>                             |
|  | Avg.<br>Weekly<br>Wage | \$782   | \$932     | \$471   | \$543      | \$573   | <b>\$730</b>                           |
| Retail Trade   | #                      | 267     | 3,497     | 727     | 1,605      | 1,541   | <b>7,637</b>                           |
|  | Avg.<br>Weekly<br>Wage | \$466   | \$569     | \$451   | \$453      | \$501   | <b>\$516</b>                           |
| Transportation and<br>Warehousing                      | #                      | 63      | 2,342     | 87      | 639        | 1,079   | <b>4,210</b>                           |
|  | Avg.<br>Weekly<br>Wage | \$1,155 | \$803     | \$777   | \$986      | \$793   | <b>\$833</b>                           |
| Utilities  | #                      | *       | 145       | *       | 70         | 147     | *                                      |
|  | Avg.<br>Weekly<br>Wage | *       | \$1,260   | *       | \$1,030    | \$1,944 | *                                      |
| Wholesale Trade  | #                      | 180     | 1,104     | 45      | 265        | 74      | <b>1,668</b>                           |
|  | Avg.<br>Weekly<br>Wage | \$1,225 | \$1,043   | \$1,300 | \$841      | \$1,110 | <b>\$1,040</b>                         |

Source: Virginia Employment Commission. Quarterly Census of Employment and Wages. 2<sup>nd</sup> Quarter 2017.

## Appendix E. Poverty by County

|                         |  | Clarke | Frederick | Page  | Shenandoah | Warren | Northern Shenandoah Valley Total |
|-------------------------|--|--------|-----------|-------|------------|--------|----------------------------------|
|                         | Poverty Rate                           | 7.9%   | 7.3%      | 14.8% | 12.2%      | 9.8%   | <b>9.8%</b>                      |
| Poverty by Racial Group | White Alone                            | 9.4%   | 5.9%      | 15.8% | 10.3%      | 10.1%  | <b>9.1%</b>                      |
|                         | Black/African American Alone           | 16%    | 5.6%      | 30.3% | 12.8%      | 20%    | <b>12.1%</b>                     |
|                         | Native American Alone                  | 32.8%  | 10.6%     | 0%    | 43.8%      | 12.7%  | <b>14.6%</b>                     |
|                         | Asian Alone                            | 34.8%  | 2.2%      | 20.6% | 36.0%      | 7.0%   | <b>10.4%</b>                     |
|                         | Native Hawaiian/Pacific Islander Alone | -      | 0%        | -     | -          | 0%     | <b>0%</b>                        |
|                         | Other Race Alone                       | 53.4%  | 10.7%     | 20%   | 11%        | 0%     | <b>16.8%</b>                     |
|                         | Two or more Races                      | 19.2%  | 9.5%      | 14.9% | 15%        | 11.4%  | <b>12.4%</b>                     |
| Poverty by Ethnicity    | Hispanic or Latino                     | 34.2%  | 12.9%     | 27.8% | 12.9%      | 4.6%   | <b>13.6%</b>                     |
|                         | Not Hispanic or Latino                 | 9.3%   | 5.4%      | 15.6% | 10.1%      | 10.2%  | <b>8.9%</b>                      |
| Poverty by Sex          | Female                                 | 12.7%  | 6.7%      | 17.0% | 12.7%      | 12.3%  | <b>10.7%</b>                     |
|                         | Male                                   | 9.8%   | 5.1%      | 15.0% | 8.5%       | 8.5%   | <b>8.0%</b>                      |

Source: American Community Survey: 2016 5-year Estimates. U.S. Census Bureau

## Appendix F. Living Wage by County and Family Type

|                                    | <b>Clarke</b> | <b>Frederick</b> | <b>Page</b> | <b>Shenandoah</b> | <b>Warren</b> | <b>Northern Shenandoah Valley Average</b> |
|------------------------------------|---------------|------------------|-------------|-------------------|---------------|---|
| 1 Adults                           | \$15.70       | \$11.65          | \$10.79     | \$10.33           | \$11.78       | <b>\$12.05</b>                            |
| 1 Adult<br>1 Child                 | \$28.37       | \$23.81          | \$22.17     | \$22.86           | \$23.99       | <b>\$24.24</b>                            |
| 1 Adult<br>2 Children              | \$33.03       | \$28.47          | \$26.83     | \$27.52           | \$28.65       | <b>\$28.90</b>                            |
| 1 Adult<br>3 Children              | \$40.78       | \$35.40          | \$32.99     | \$34.07           | \$35.35       | <b>\$35.72</b>                            |
| 2 Adults (1 working)               | \$22.47       | \$17.81          | \$17.11     | \$17.20           | \$17.95       | <b>\$18.51</b>                            |
| 2 Adults (1 working)<br>1 Child    | \$27.65       | \$23.08          | \$21.44     | \$22.14           | \$23.27       | <b>\$23.52</b>                            |
| 2 Adults (1 working)<br>2 Children | \$30.12       | \$25.56          | \$23.92     | \$24.61           | \$25.74       | <b>\$25.99</b>                            |
| 2 Adults (1 working)<br>3 Children | \$34.40       | \$29.02          | \$26.60     | \$27.69           | \$28.97       | <b>\$29.34</b>                            |
| 2 Adults                           | \$11.23       | \$8.91           | \$8.56      | \$8.60            | \$8.98        | <b>\$9.26</b>                             |
| 2 Adults<br>1 Child                | \$15.76       | \$13.48          | \$12.66     | \$13.01           | \$13.57       | <b>\$13.70</b>                            |
| 2 Adults<br>2 Children             | \$17.81       | \$15.53          | \$14.71     | \$15.06           | \$15.62       | <b>\$15.75</b>                            |
| 2 Adults<br>3 Children             | \$20.76       | \$18.07          | \$16.86     | \$17.40           | \$18.04       | <b>\$18.23</b>                            |

Source: American Community Survey: 2016 5-year Estimates. U.S. Census Bureau

## Appendix G. Transportation Characteristics by County

|  |   | Clarke | Frederick | Page  | Shenandoah | Warren | Northern Shenandoah Valley Total |
|--|---|--------|-----------|-------|------------|--------|----------------------------------|
|  | Mean travel time to work (minutes)              | 34.5   | 30.5      | 33.1  | 31.7       | 41.3   | <b>33.3</b>                      |
| <b>Means of Transportation to Work</b> | Drove alone                                     | 80.0%  | 82.0%     | 76.5% | 80.6%      | 75.6%  |                                  |
|  | Carpooled                                       | 8.0%   | 11.7%     | 15.6% | 12.8%      | 16.1%  |                                  |
|  | Public transit                                  | 0.3%   | 0.2%      | 0.5%  | 0.3%       | 0.1%   |                                  |
|  | Walked  | 4.6%   | 0.8%      | 2.3%  | 1.7%       | 1.4%   |                                  |
|  | Taxi, motorcycle, bike, or other                | 0.7%   | 0.7%      | 0.7%  | 0.7%       | 1.0%   |                                  |
|  | Percent of households with no vehicle available | 5.6%   | 3.6%      | 3.8%  | 5.2%       | 5.2%   | <b>4.4%</b>                      |

Source: American Community Survey: 2016 5-year Estimates. U.S. Census Bureau

## Appendix H. Housing Characteristics by County

|   |                    | Clarke    | Frederick | Page      | Shenandoah | Warren    | Northern Shenandoah Total |
|---|--------------------|-----------|-----------|-----------|------------|-----------|---------------------------|
|   | Vacancy Rate       | 11.0%     | 8.0%      | 18.2%     | 18.2%      | 12.2%     | <b>12.8%</b>              |
|   | Median House Value | \$333,000 | \$231,400 | \$171,300 | \$200,100  | \$223,300 |                           |
| Median Monthly Housing Cost                       | Renter             | \$1,054   | \$1,106   | \$700     | \$770      | \$939     |                           |
|   | Owner (mortgage)   | \$1,815   | \$1,562   | \$1,158   | \$1,294    | \$1,458   |                           |
| Median Monthly Income                             | Renter             | \$3,389   | \$4,008   | \$2,633   | \$2,403    | \$2,983   |                           |
|   | Owner              | \$7,262   | \$6,517   | \$4,559   | \$5,168    | \$6,378   |                           |
| Percent of Households that are cost burdened      | Renter Occupied    | 52.3%     | 45.5%     | 45.7%     | 51.5%      | 48.1%     | <b>48.0%</b>              |
|   | Owner Occupied     | 25.6%     | 21.9%     | 20.4%     | 21.2%      | 25.0%     | <b>22.4%</b>              |
|   | Total              | 31.7%     | 26.7%     | 27.1%     | 29.4%      | 30.1%     | <b>28.3%</b>              |
| Percent of Households moved in the last 12 months | At or above FPL    | 7.3%      | 10.2%     | 9.8%      | 13.7%      | 9.7%      | <b>10.6%</b>              |
|   | Below FPL          | 16.7%     | 14.5%     | 17.3%     | 24.5%      | 21.0%     | <b>19.0%</b>              |

Source: US Census Bureau. American Community Survey 2012-2016 5-year estimates. Table DP04 and Table B07012.

## Appendix I. Educational Attainment by County (percent of population 25+)

|                                      | <b>Clarke</b> | <b>Frederick</b> | <b>Page</b> | <b>Shenandoah</b> | <b>Warren</b> | <b>Northern<br/>Shenandoah<br/>Total</b> |
|--------------------------------------|---------------|------------------|-------------|-------------------|---------------|--|
| Less than 9 <sup>th</sup> grade      | 5.0%          | 4.2%             | 8.3%        | 6.1%              | 4.2%          | <b>5.2%</b>                              |
| 9-12 <sup>th</sup> grade, no diploma | 7.6%          | 7.7%             | 12.4%       | 8.2%              | 9.9%          | <b>8.8%</b>                              |
| High school graduate                 | 28.9%         | 31.2%            | 44.1%       | 39.7%             | 37.7%         | <b>35.7%</b>                             |
| Some college or associate's degree   | 28.5%         | 28.1%            | 22.2%       | 26.5%             | 28.1%         | <b>27.1%</b>                             |
| Bachelor's degree                    | 16.9%         | 17.6%            | 8.7%        | 12.8%             | 13.4%         | <b>14.6%</b>                             |
| Graduate or professional degree      | 13.1%         | 11.2%            | 4.2%        | 6.6%              | 6.7%          | <b>8.6%</b>                              |

Source: US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table S1501

# Appendix J. Head Start Eligibility Estimate

## Methodology

The number of children eligible for the Head Start and Early Head Start program was calculated using data obtained from the Virginia Department of Education and the U.S. Census Bureau by using the Free Lunch Method, which utilizes the number and percentage of children participating in the federally sponsored free lunch meal program.

Each school district in the service area offers the free lunch program to income-eligible children and their families. Participation in the free lunch program, similar to the Head Start and Early Head Start programs, is based on family income. In other words, a family must have an annual income that is below a certain level before they are eligible to participate in either program.

The population estimate for eligible Head Start children (aged 3-5) is derived from taking a percentage (40%) of the population age 0 to 5 (2016) in the localities. Once the total number of three- and four-year-olds is estimated, the percentage of those children who are potentially eligible for the Head Start program is calculated by using the percentage of children enrolled in the free lunch program at each elementary school. This “free lunch percentage” is then applied to the total estimated number of three and four year olds. The result is the estimated number of Head Start eligible children living within a specified area.

As with other methods of estimating the number of Head Start children, the Free Lunch Method has certain drawbacks. Perhaps the greatest challenge presented by the Free Lunch Method is the different income thresholds utilized by the free lunch and Head Start programs. To be income eligible to participate in the Head Start program, a child’s family must have an annual income that is below the federally mandated poverty line. However, to be income eligible to participate in the free lunch program, a family may have an income that is equal to 130% of the federal poverty level. Thus, the income threshold used to determine eligibility for the free lunch program is 30% higher than the income limits used for the Head Start program.

To compensate for the differences in income eligibility requirements, the estimates of Head Start eligible children will be provided as a range. The greater number of eligible children is the estimated number of eligible children using the data produced by the Free Lunch Method with no adjustments. The lower estimate incorporates a 30% decrease in the number of eligible children to account for the difference between the income eligibility thresholds of the free lunch and Head Start programs. Despite the challenges associated with the use of the Free Lunch Method, the benefits provided by this technique far exceed those produced by other methods since it allows for a much more precise determination of the actual location of eligible children.

## Appendix K. Childcare Characteristics by County

|                      |                            | Clarke | Frederick | Page | Shenandoah | Warren | Northern Shenandoah Total |
|----------------------|----------------------------|--------|-----------|------|------------|--------|---------------------------|
| Licensed             | Providers                  | 9      | 14        | 4    | 9          | 9      | 45                        |
|                      | Slots                      | 539    | 963       | 104  | 295        | 774    | 2,675                     |
| Fulltime             | Providers                  | 7      | 22        | 6    | 17         | 13     | 66                        |
|                      | Slots                      | 446    | 1,857     | 196  | 710        | 1,138  | 4,377                     |
| Religious Exempt     | Providers                  | 1      | 12        | 4    | 8          | 6      | 31                        |
|                      | Slots                      | 30     | 1,024     | 144  | 500        | 489    | 2,187                     |
| Serve Newborns       | Providers                  | 3      | 13        | 2    | 9          | 7      | 34                        |
| Accept Subsidies     | Providers                  | 3      | 4         | 3    | 5          | 7      | 22                        |
| Total Child Day Care | Providers                  | 11     | 26        | 8    | 23         | 15     | 83                        |
|                      | Slots                      | 569    | 1,987     | 248  | 840        | 1,263  | 4,907                     |
|                      | Fall 2017 Pre K Enrollment | 43     | 112       | 91   | 147        | 98     | 491                       |

Source: Virginia Department of Social Services. Child Day Care Search. Accessed February 2018.

## Appendix L. Mental Health and Substance Abuse Indicators by County

|  | <b>Clarke</b> | <b>Frederick</b> | <b>Page</b> | <b>Shenandoah</b> | <b>Warren</b> | <b>Northern<br/>Shenandoah<br/>Total</b> |
|--|---------------|------------------|-------------|-------------------|---------------|--|
| EMS Narcan Administration Rate (per 100,000) <sup>1</sup>      | 62.7          | 64.9             | 33.7        | 41.7              | 76.8          | <b>58.1</b>                              |
| Fentanyl/Heroin Overdose Death Rate (per 100,000) <sup>1</sup> | 20.9          | 18.0             | 0           | 6.9               | 12.8          | <b>12.7</b>                              |
| Number of Mental Health Providers <sup>2</sup>                 | 8             | 30               | 7           | 18                | 33            | <b>96</b>                                |
| Ratio of Residents per 1 Mental Health Provider <sup>2</sup>   | 1,795         | 2,773            | 3,389       | 2,399             | 1,184         | <b>1,714</b>                             |

<sup>1</sup>Source: Virginia Department of Health. Opioid Addiction Indicators Dashboard. 2016.

<sup>2</sup>Source: County Health Rankings and Roadmaps. NPI Registry. 2016

## Appendix M. Health Characteristics by County

|  |  | Clarke | Frederick | Page  | Shenandoah | Warren | Northern Shenandoah Total |
|--|--|--------|-----------|-------|------------|--------|---------------------------|
|  | Adult Obesity Rate <sup>1</sup>                      | 26.8%  | 31.7%     | 28.3% | 26.6%      | 29.2%  | <b>29.35%</b>             |
|  | Food Insecurity Rate <sup>2</sup>                    | 8.5%   | 6.6%      | 12.3% | 8.8%       | 8.7%   | <b>8.3%</b>               |
|  | % of Households receiving SNAP benefits <sup>3</sup> | 6.2%   | 5.2%      | 13.4% | 10.2%      | 10.9%  | <b>8.5%</b>               |
| Health Insurance Coverage <sup>4</sup> | Percent Uninsured                                    | 14.1%  | 11.0%     | 13.6% | 10.9%      | 11.3%  | <b>11.6%</b>              |
|  | Percent of Children, Uninsured                       | 15.9%  | 3.3%      | 5.1%  | 6.2%       | 5.5%   | <b>5.3%</b>               |
|  | Percent Uninsured, income below \$25,000             | 38.3%  | 20.7%     | 24.2% | 19.9%      | 19.7%  | <b>22.0%</b>              |
|  | Percent Uninsured, income above \$25,000             | 11.3%  | 10.1%     | 11.1% | 9.1%       | 10.1%  | <b>10.1%</b>              |

<sup>1</sup>Source: Centers for Disease Control and Prevention. Diabetes Atlas. 2013 Obesity Rates.

<sup>2</sup>Source: Feeding America. Map the Meal. 2015

<sup>3</sup>Source: US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table DP03

<sup>4</sup>Source: US Census Bureau. American Community Survey. 2012-2016 5-Year Estimates. Table S2701

# Appendix N. Staff Survey Summary

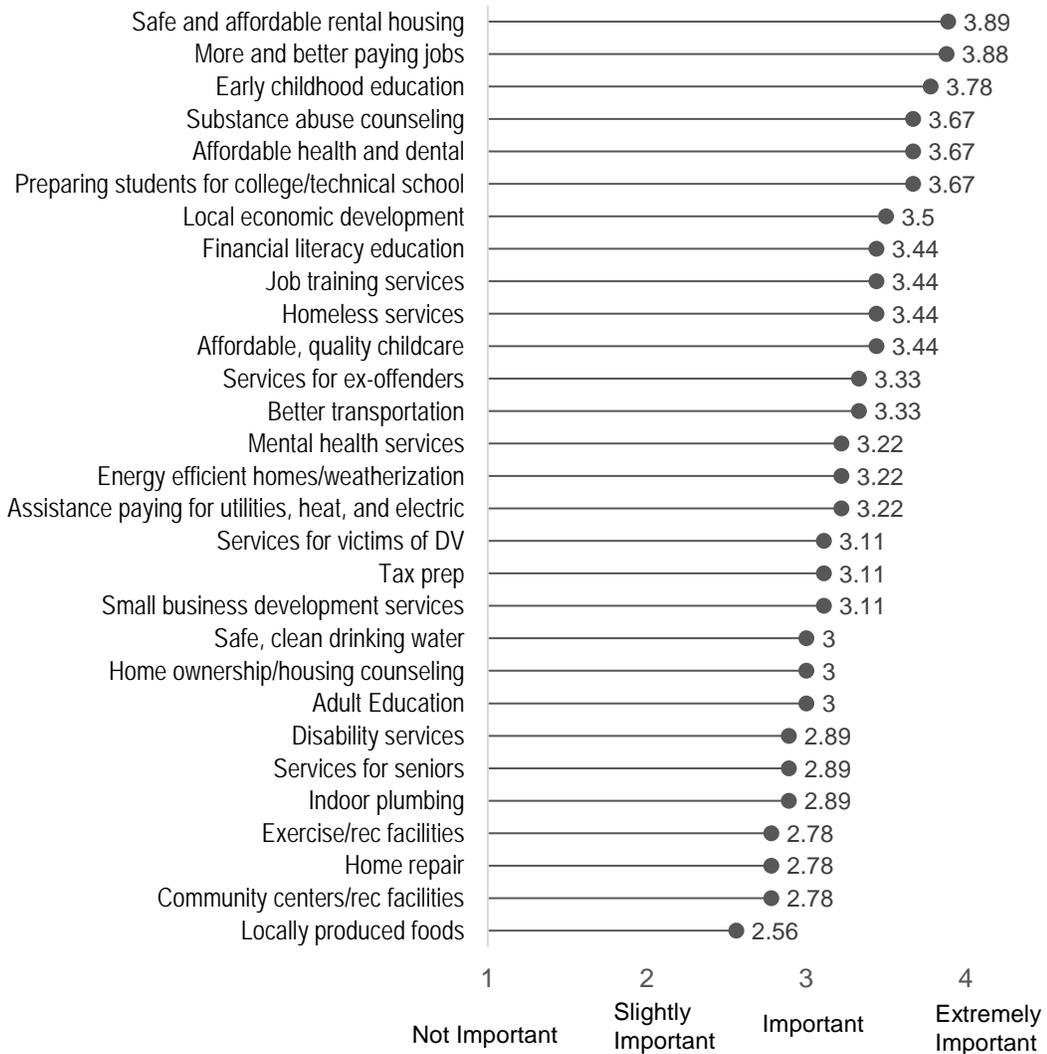
## Greatest Needs in Staff Members' Communities:

1. **Housing**
2. **Quantity and quality of jobs**
3. **Substance abuse services**
4. **Workforce skills**
5. **Home repair**

All employees at People Incorporated were given the opportunity to provide input for the Needs Assessment through a short, electronic survey in September 2017. Ten staff who work in the Northern Shenandoah Valley responded.

When asked about the greatest need in their community, staff overwhelmingly indicated **housing**.

Staff also ranked specific needs in the areas of education, children, and youth; housing; jobs, the economy, and financial growth; health and wellness; and other services. **Staff scored safe and affordable rental housing, more and better paying jobs, and early childhood education as the highest.**



# Appendix O. Board Survey Summary

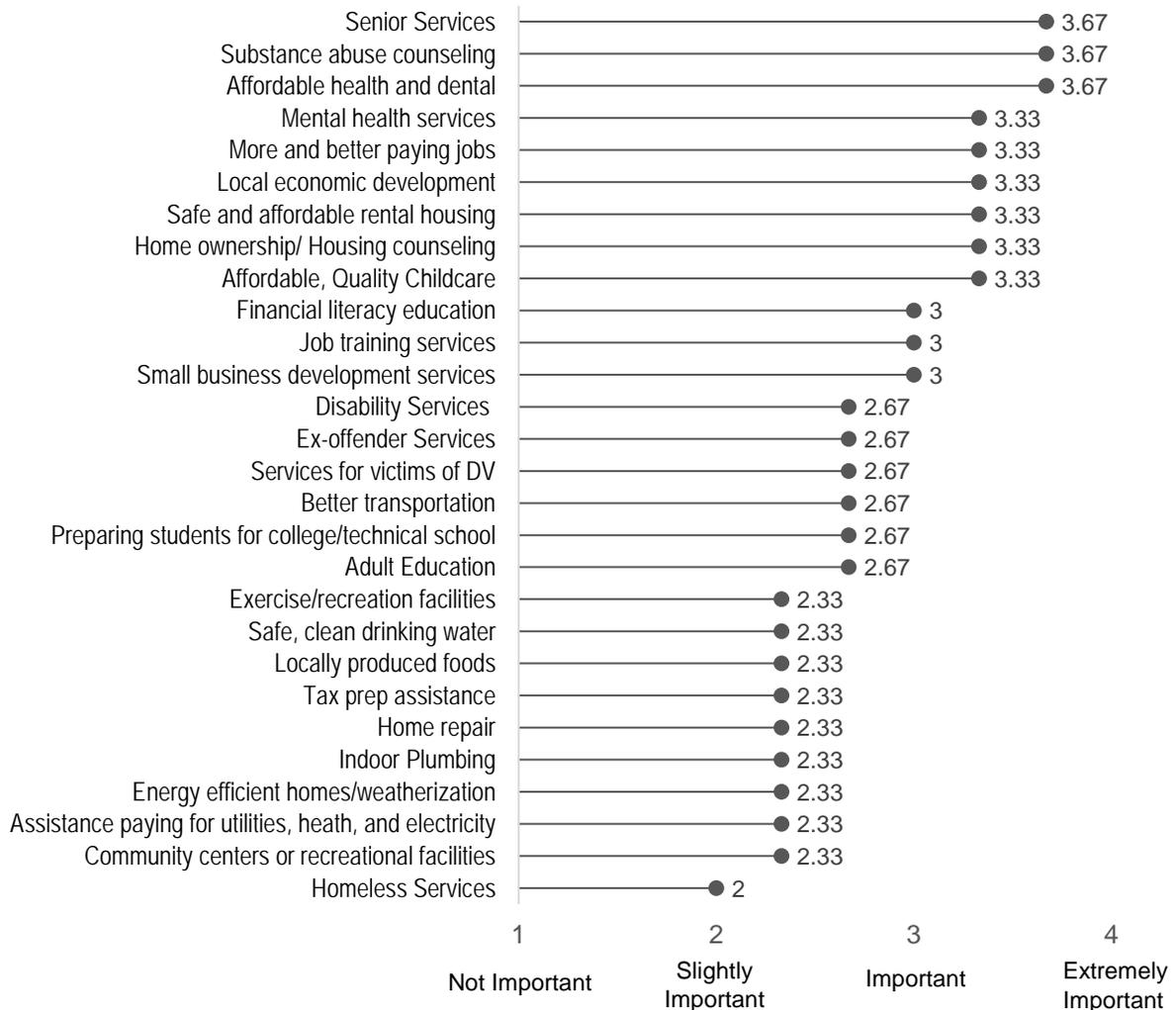
**Greatest Needs in Board Members' Communities:**

1. Housing
2. Childcare

Similar to the staff survey, a short electronic survey was administered to the People Incorporated Board of Directors in September 2017. Three board members from the Northern Shenandoah Valley responded.

When asked about the greatest need in their community, board members overwhelmingly indicated **housing**.

Board members also ranked specific needs in the areas of education, children, and youth; housing; jobs, the economy, and financial growth; health and wellness; and other services. **Board members scored senior services, substance abuse counseling, and affordable health and dental as most important.**



# Appendix P. Partner Survey Summary

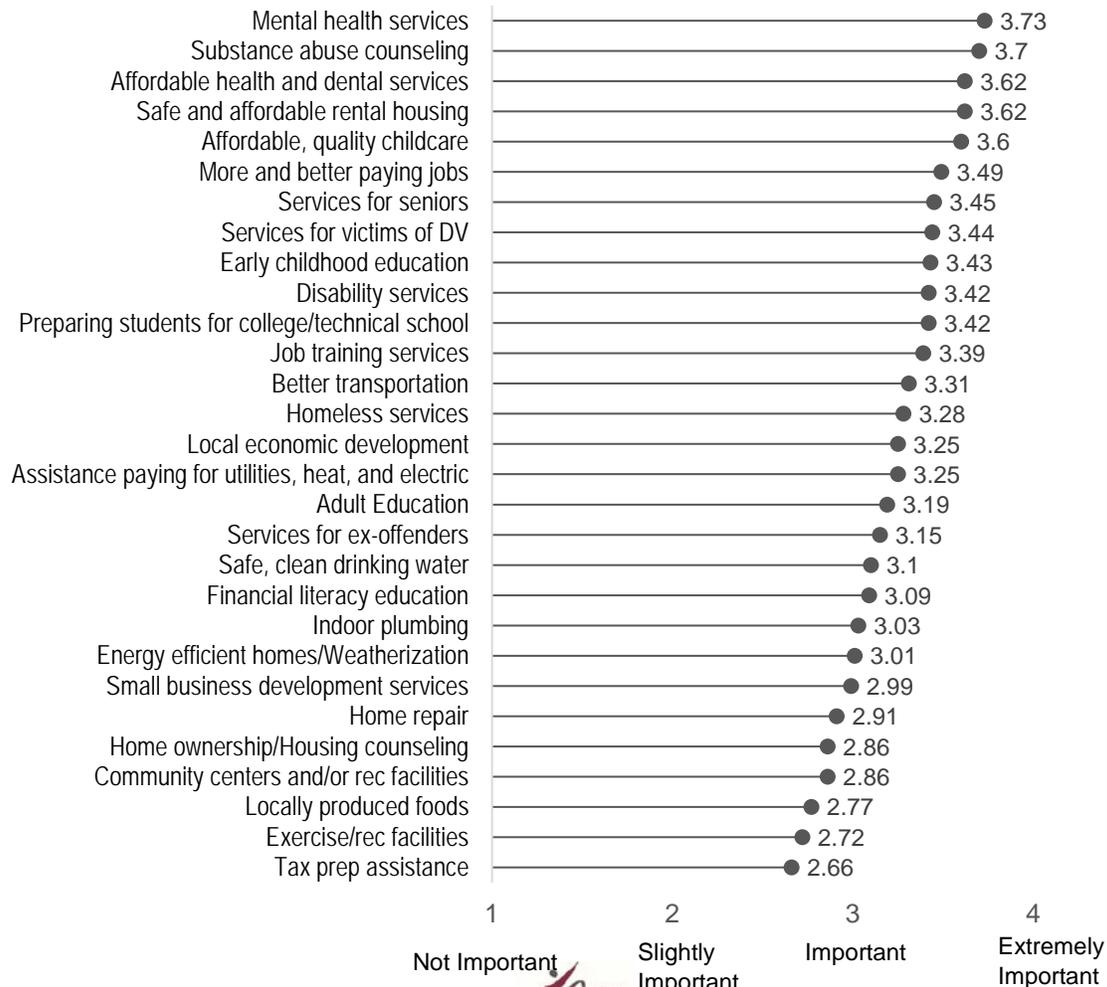
## Greatest Needs in Partners' Communities:

1. Housing
2. Quantity and quality of jobs
3. Mental health services
4. Transportation
5. Substance abuse services
6. Workforce skills
7. Communication and coordination among providers

Collecting input from others who work with the low-income community throughout People Incorporated's four regions was an important strategy for developing a comprehensive picture of current community needs. The survey was directly emailed to partners from People Incorporated staff. Additionally, the survey link was shared at meetings with other human services organizations during September and October 2017. A total of 110 partner surveys were completed from the Northern Shenandoah Valley.

When asked about the greatest need in their community, partners overwhelmingly indicated **housing**, with four times as many partners listing housing as any other need.

Partners also ranked specific needs in the areas of education, children, and youth; housing; jobs, the economy, and financial growth; health and wellness; and other services. **Partners scored mental health services, substance abuse counseling, affordable health and dental, and safe and affordable rental housing as most important.**



# Appendix Q. Community Member Survey Summary

The most important informant group for the Community Needs Assessment was individual members of the community. The community member survey was the longest of the surveys, and administered on paper rather than electronically. In an effort gather feedback from low-income community members, People Incorporated used a convenience sample. People Inc. partnered with other organizations including food pantries, medical missions, and homeless shelters to administer the survey. Additionally, program staff administered the survey to current clients in conjunction with People Incorporated's semi-annual customer satisfaction survey in October 2017. A total of 49 valid surveys were returned from the Northern Shenandoah Valley region.

## Respondent Demographics

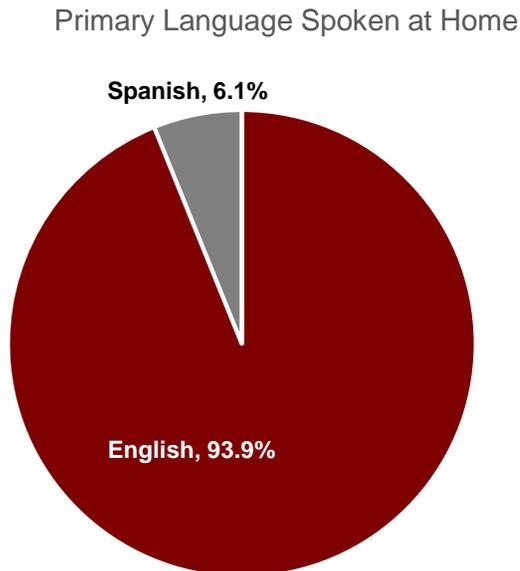
Forty percent of survey respondents reported an annual income of \$20,000 or less.



The average household size was 3.6, larger than the average household size in Virginia, which is 2.6<sup>52</sup>.

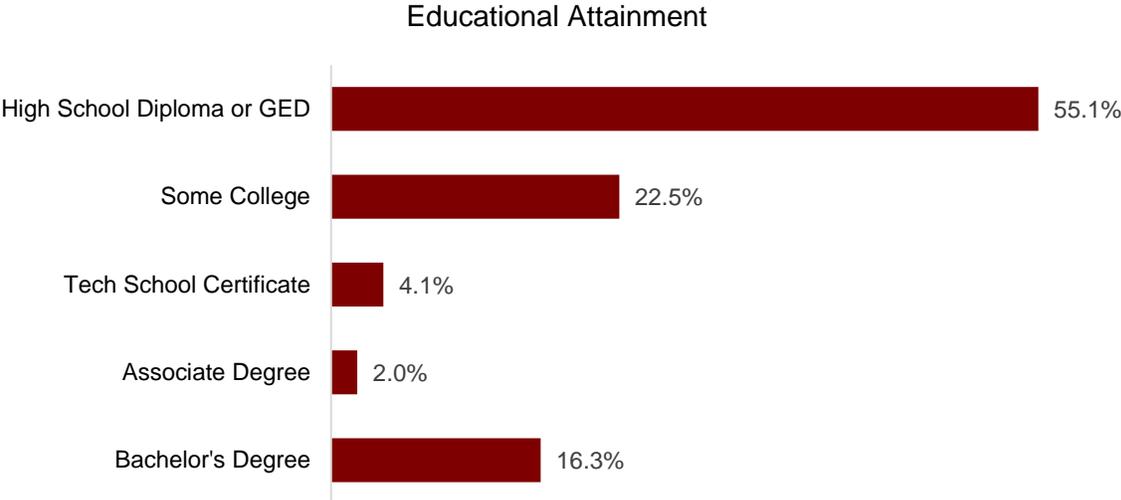
None of the Northern Shenandoah Valley respondents were either veterans or active military members.

The vast majority of respondents spoke primarily English at home, but 6% spoke Spanish



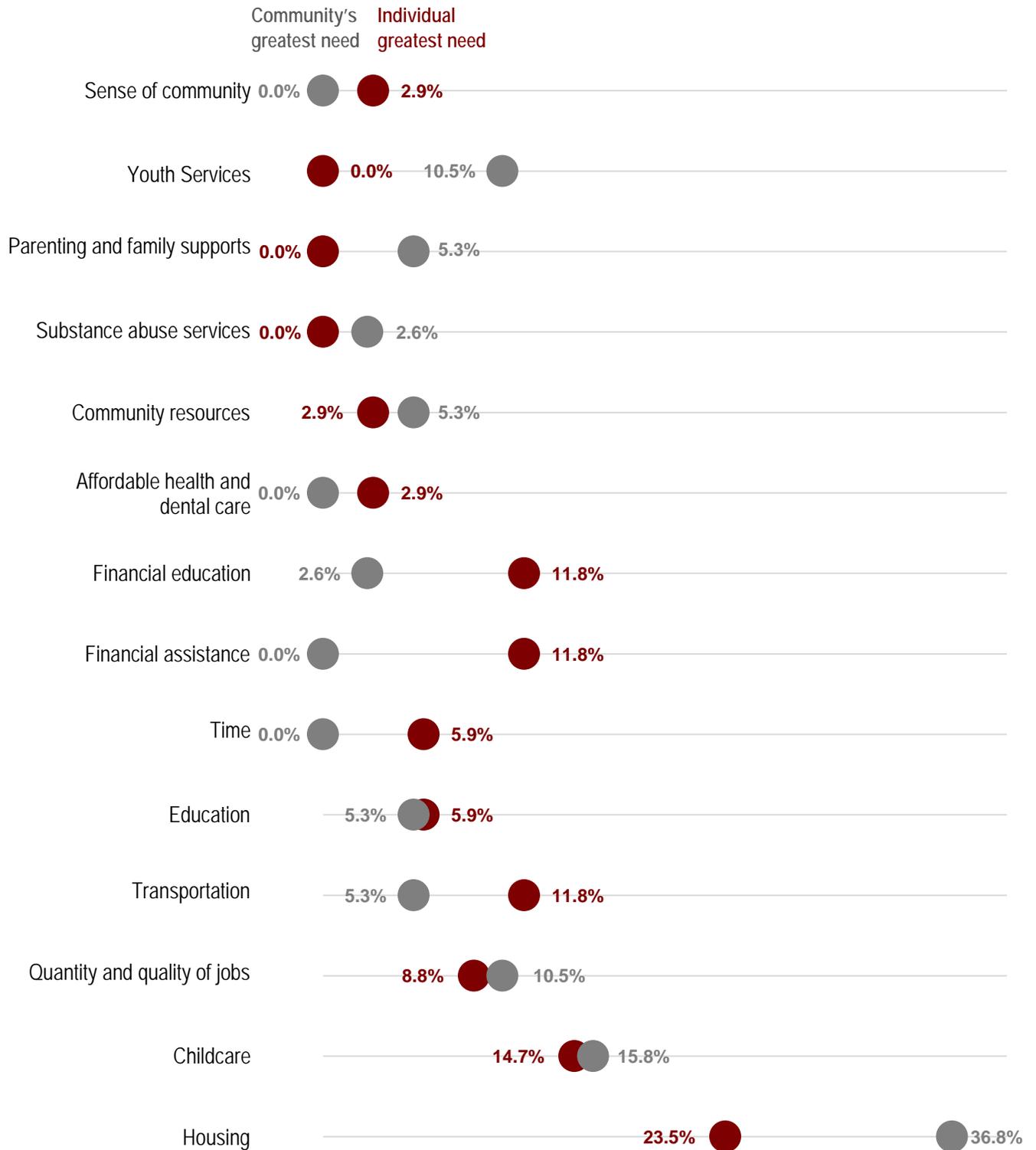
<sup>52</sup> US Census Bureau. American Community Survey. 2012-2016 5-year Estimates. Table DP02.

Most respondents had either a high school diploma or GED, and 18% had earned a college degree.



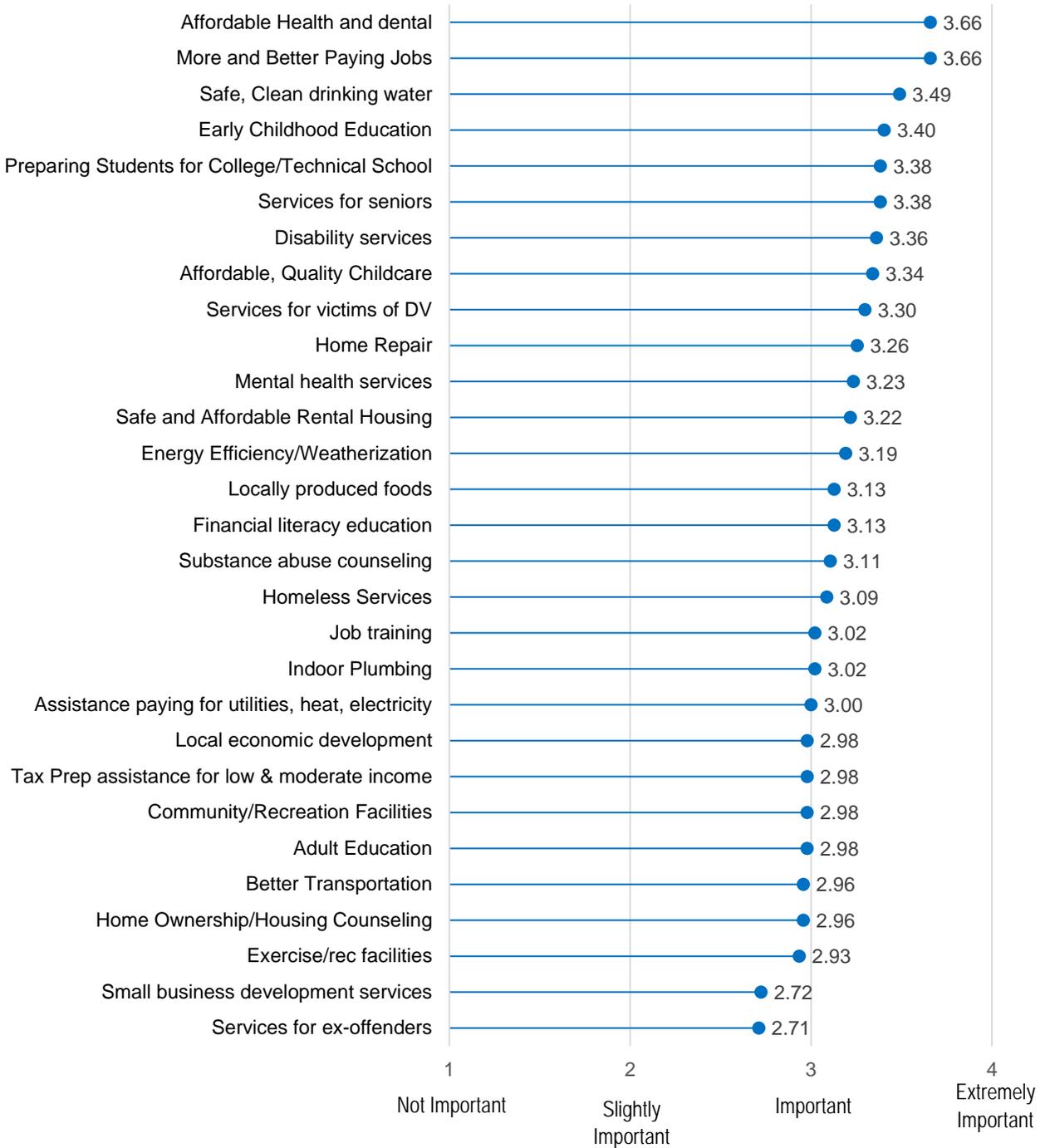
## Needs

Community members were asked to identify the single greatest need both for themselves and their community.



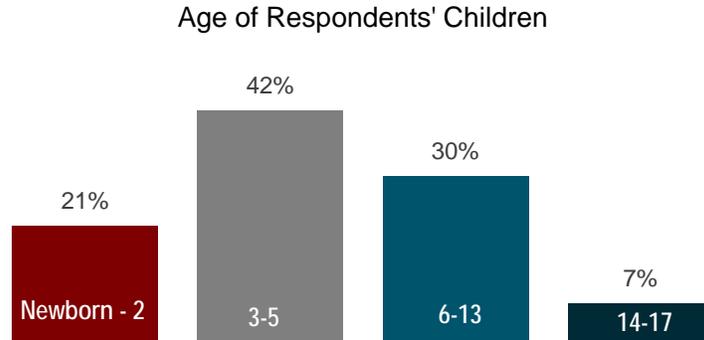
Respondents also scored the importance of 29 different needs. The graphic below displays the average importance score (1-4) for each need.

### Northern Shenandoah Valley



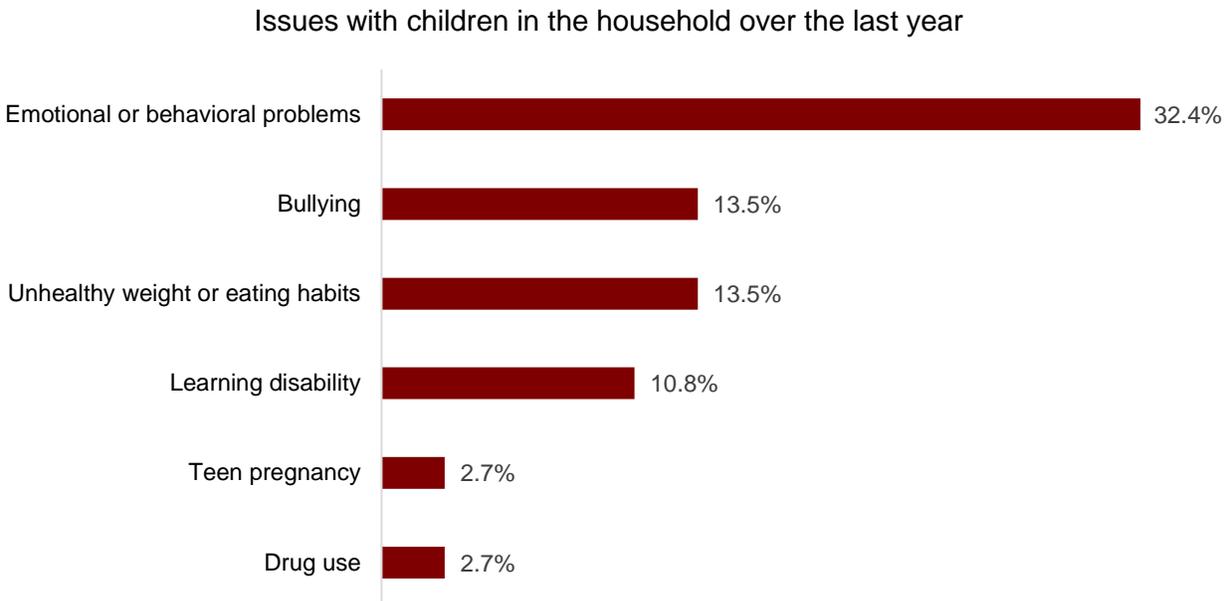
## Children

81% of respondents indicated that children under 18 lived in their household. Most children were under 5 years old.



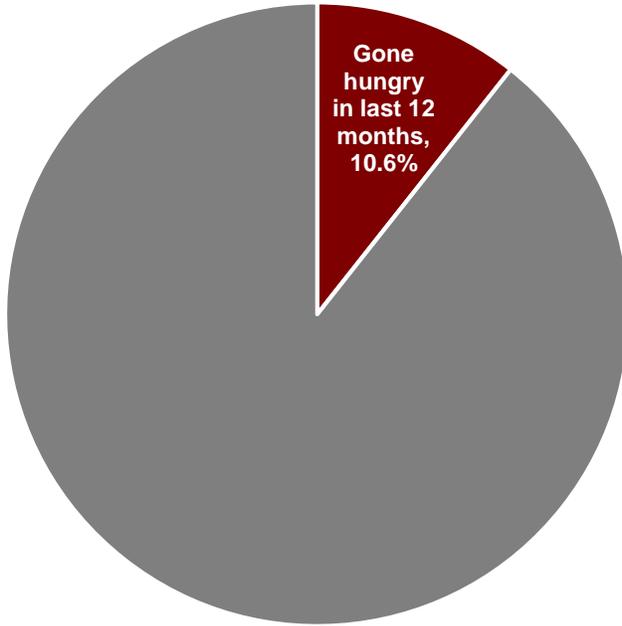
Most of the children in respondents' households were their own children, but some households also included stepchildren and other related children.

Respondents had experienced many issues with the children in their households over the past year, the most common being emotional or behavioral problems, bullying, and unhealthy weight or eating habits.



## Food Security

Eleven percent of respondents reported having gone hungry in the last twelve months. This is despite the fact that many used food assistance through SNAP, food banks, or other assistance.



- 47% used SNAP
- 29% used food banks or food pantries

## Employment and Financial Health

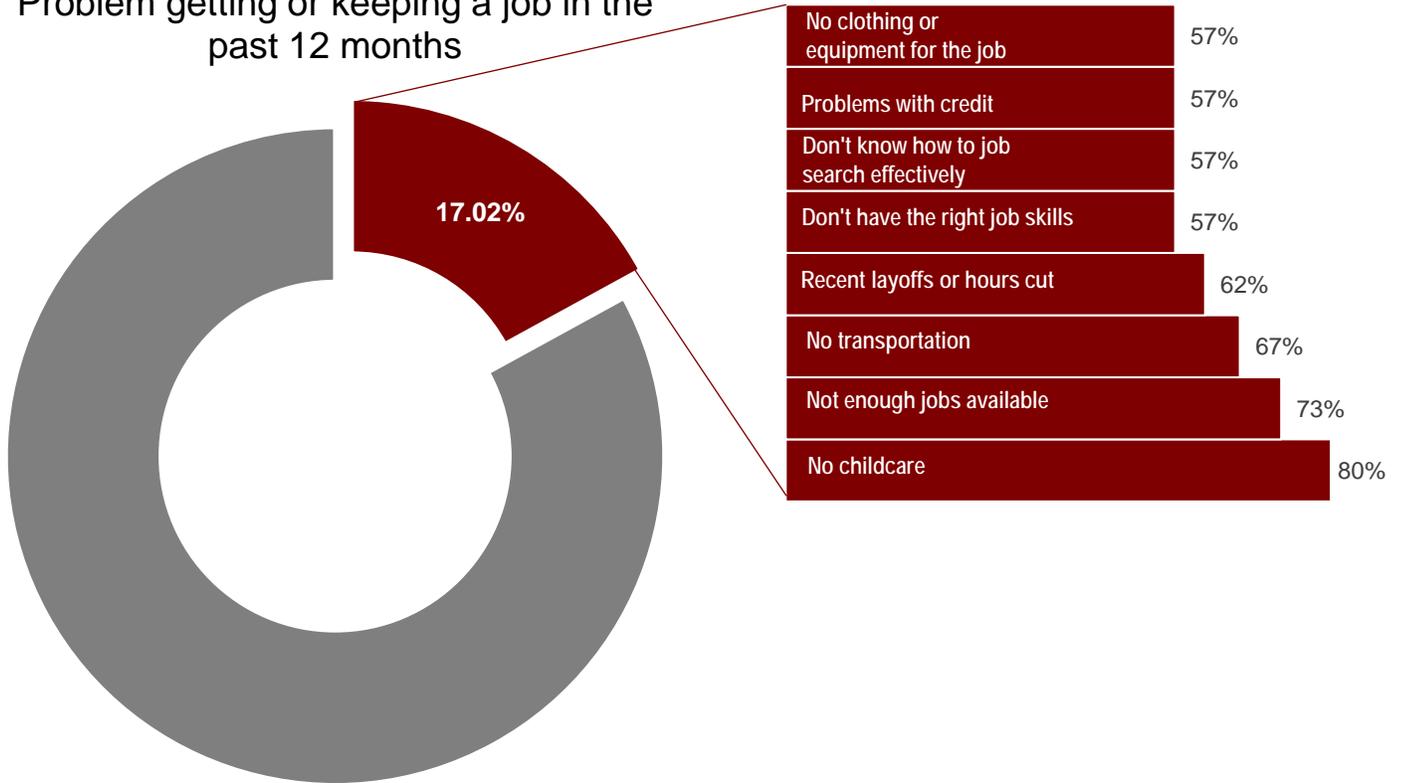
Almost three-quarters of respondents were employed.

### Employment Status

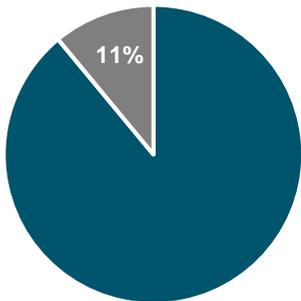


Seventeen percent of survey respondents indicated they'd had problems getting or keeping a job in the last twelve month. Of those who had had trouble, the most common issue was no childcare.

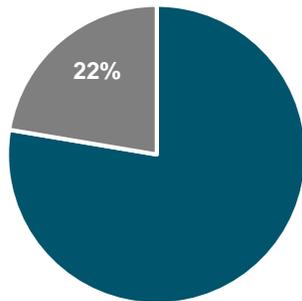
Problem getting or keeping a job in the past 12 months



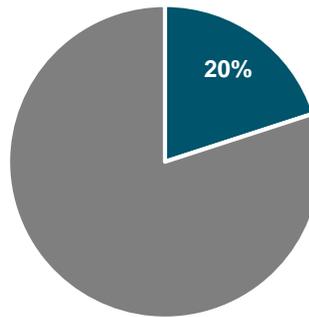
11% of respondents do not have reliable transportation.



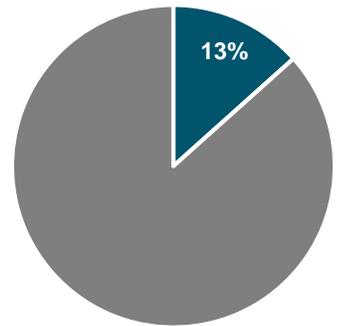
22% of respondents do not have a bank account.



20% of respondents used payday loans, title loans, or check advance in the last year.



13% of respondents have had their utilities shut off in the past year.



## Housing

Most respondents were living in permanent housing, either a home they own or rent. However, 21% were in other living situations like a shelter or living with family or friends.

### Living Situation



Respondents had faced a variety of negative living situations in the past year.

Have any of the following situations happened to you in the past 12 months?

