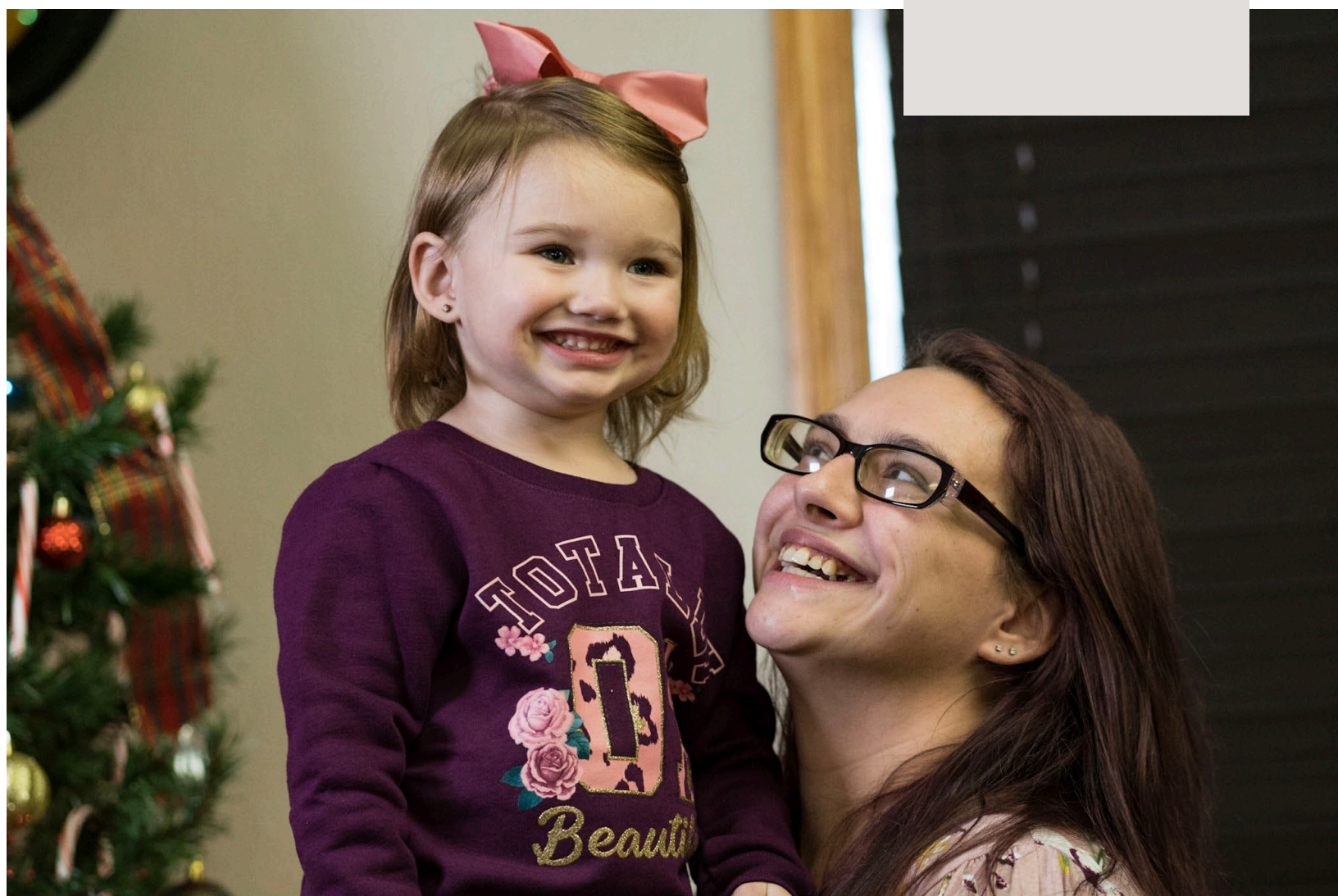


2021 COMMUNITY NEEDS ASSESSMENT



Northern Shenandoah Valley

Contents

Executive Summary	5
Full Needs Assessment	5
Methodology	6
Surveys	6
Staff Survey	6
Board Survey	6
Partner Survey	6
Community Survey	6
Focus Groups	7
Secondary Data	7
Overview of the People Incorporated Northern Shenandoah Valley Region	8
Jobs and Income	11
Quality Jobs/Wages	12
Employment Opportunities	15
Community Resources	16
Childcare	17
Availability	17
Quality	18
Affordability	19
Public Support for Early Childhood Education	20
.....	21
Transportation	21
Housing and Homelessness	23
Availability	23
Affordability	24
Homelessness	25
Health	26
Access to Affordable Healthcare	26
Substance Abuse and Mental Health	28
Food and Nutrition	29
Education	31
Kindergarten Readiness	31
Educational Attainment	32
Youth Activities and Engagement	Error! Bookmark not defined.

COVID-19	34
Health and Mental Health	35
Employment	36
Education	37
Housing	37
Food Security	38
Internet Connectivity.....	38
Appendix 1: Total Population by Locality.....	39
Appendix 2: Racial and Ethnic Composition by Locality	39
Appendix 3: Age and Sex by Locality.....	39
Appendix 4: Language Spoken at Home.....	40
Appendix 5: Annual Unemployment Rates by Locality	40
Appendix 6: Living Wage by Family Type and Locality.....	41
Appendix 7: Poverty Rates by Characteristic	41
Appendix 8: Average Weekly Wage by Locality	42
Appendix 9: ALICE Status.....	42
Appendix 10: Median Annual Household Income by Housing Status	42
Appendix 11: Labor Force Participation Rate by Locality	43
Appendix 12: New Hires by Industry – 1 st Quarter 2020	44
Appendix 13: Children Under 6 with All Parents in Labor Force	45
Appendix 14: Childcare Characteristics by County.....	45
Appendix 15: Public Pre-Kindergarten Enrollment.....	46
Appendix 16: Transportation to Work.....	46
Appendix 17: Vacancy Rates by Locality.....	47
Appendix 18: Age of Housing Stock by Ownership Status	47
Appendix 19: Housing Cost Burden by Ownership Status.....	48
Appendix 20: Insurance Coverage	48
Appendix 21: Healthcare Providers and Capacity	49
Appendix 22: Substance Abuse Indicators	49
Appendix 23: Food and Nutrition Indicators.....	49
Appendix 24: Kindergarten Readiness	50
Appendix 25: Educational Attainment.....	50
Appendix 26: High School Completion Rates.....	51
Appendix 27: Daily New COVID-19 Cases.....	51
Appendix 28: COVID-19 Risk Factor Prevalence	51

Appendix 29: Monthly Unemployment Rate – COVID-19 Time Period52
Appendix 30: Staff Survey Summary.....53
Appendix 31: Board Survey Summary55
Appendix 32: Partner Survey Summary57
Appendix 33: Community Member Survey Summary59



Executive Summary

People Incorporated is the Community Action Agency for 13 counties and 3 cities in Virginia. As a 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. People Incorporated hopes that the information in this report can also be used throughout Virginia 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 staff and board of People Incorporated identified the following as the top needs in the Northern Shenandoah Valley region:

1. Family supporting wages
2. Affordability of housing, including affording associated utility costs
3. Affordable, quality childcare

Full Needs Assessment

The data in this report come from the five localities that comprise People Incorporated's Northern Shenandoah Valley service region: Clarke, Frederick, Page, Shenandoah, and Warren Counties. The full 2021 Community Needs Assessment and regional reports for the Southwest Virginia, Northern Piedmont, and Greater Prince William regions are available on the People Incorporated website.



Methodology

People Incorporated serves thirteen counties and three cities throughout Virginia, providing dozens of family and community development services. The data collection and analysis process used for this assessment ensured that data was collected from a variety of sources in each of these localities.

Surveys

People Incorporated staff administered surveys to four distinct groups in the fall of 2020 to gather data for the needs assessment. Detailed results summaries for each survey are in the appendices.

Staff Survey

All employees at People Incorporated were given an opportunity to provide input through a short, electronic survey in October 2020. Of the 281 staff, 152 responded (response rate of 54%). For this

regional report, only responses from staff who work in the Northern Shenandoah Valley have been included (12 responses).

Board Survey

Similar to the staff survey, a short electronic survey was administered to the People Incorporated Board of Directors in October 2020. Of the 47 board members, 23 completed the survey (response rate of 49%). Even with only about half of board members responding, all of the People Incorporated service regions were represented. For this regional report, only responses from board members who represent the Northern Shenandoah Valley have been included (4 responses).

Partner Survey

Collecting input from others who serve the low-income community throughout People Incorporated four regions was an important strategy for developing a comprehensive picture of current community needs. A short, electronic survey was emailed directly to partners in communities served by People Incorporated. A total of 65 partners, representing all regions, completed the survey. For this regional report, only responses from partners who work in the Northern Shenandoah Valley region were included (8 responses).

Community Survey

The most important stakeholder group for the community needs assessment was individual members of the community, particularly low-income community members. The community member survey was a longer survey, including detailed questions on multiple areas of need. The survey was administered electronically through various avenues. The survey was emailed directly to all current and former clients for whom People Incorporated had a valid email address. The survey link was also shared on social media channels by People Incorporated and partners. Finally, survey responses were incentivized by offering respondents a chance to win one of three \$100 Walmart giftcards. The survey was offered in both English and Spanish. A total of 31 responses were returned from the Northern Shenandoah Valley region.

Focus Groups

To better understand how each need manifests in the community and the lives of families, People Incorporated also conducted focus groups with partners and community members in November 2020, December 2020, and January 2021.

Secondary Data

Primary data collected by People Incorporated is supplemented with publicly available secondary data throughout the report, including data from the US Census Bureau, Bureau of Labor Statistics, Virginia Department of Education, and many other sources. These data, along with reports and assessments by other community organizations and government 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.



Overview of the People Incorporated Northern Shenandoah Valley Region

People Incorporated is the designated Community Action agency for county-level localities in four distinct regions of Virginia. These regions are geographically, socially, and economically diverse. As a result, the needs of each region are diverse. This report focuses exclusively on the Northern Shenandoah Valley region, consisting of:

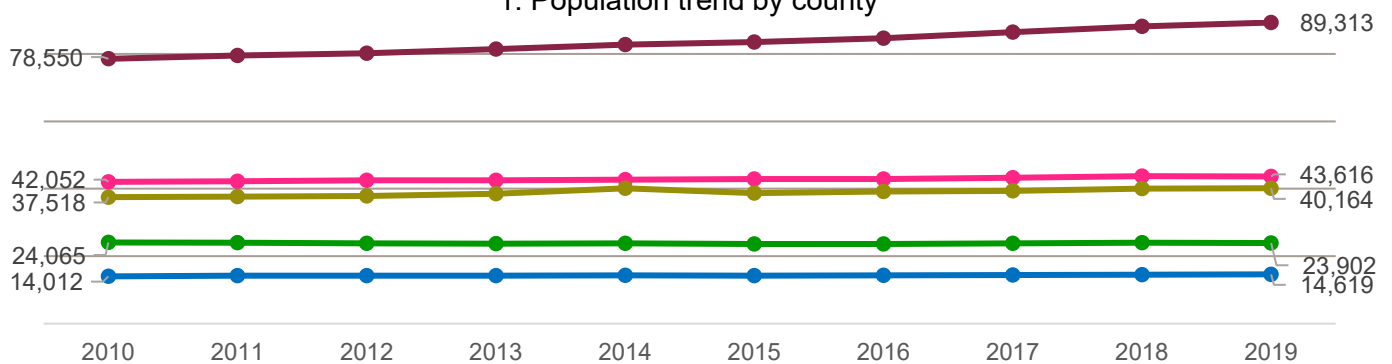
- Clarke County
- Frederick County
- Page County
- Shenandoah County
- Warren County

In graphs and charts throughout the report, each county is color coded. For your reference, here's the scheme:

Clarke – **Blue**
 Frederick – **Red**
 Page – **Green**
 Shenandoah - **Pink**
 Warren - **Yellow**

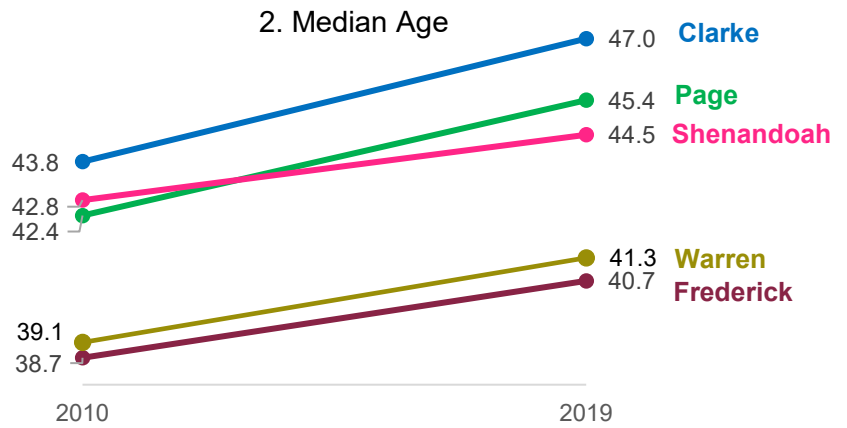
Over the last ten years, the Northern Shenandoah Valley population has remained stable in most counties, with slight increases in Warren and Shenandoah County. Frederick County has seen more substantial population growth, due to its location surrounding the population center of Winchester City.¹

1. Population trend by county



¹ US Census Bureau. American Community Survey 2019 5-Year Estimates. Table PEPANNRES

Even as Virginia’s population is growing, mostly by migration into the state from other states, the state’s population, and the population in the Northern Shenandoah Valley region, is aging. From 2010 to 2019, the median age in each county has increased.² The needs of an aging population were evident in comments from Northern Shenandoah Valley community members. Respondents desired better resources for aging family members, including affordable care for the elderly.



All counties in the Northern Shenandoah Valley region are predominantly white, with Warren having the most racial diversity and Page the least.³ Like many cities and states across the country, communities served by People Incorporated saw collective action and protests in response to the violence against people of color, particularly black Americans. In June, Governor Ralph Northam expanded the scope and extended the term of the state Commission to Examine Racial Inequity in Virginia Law.

3. Racial Composition by County

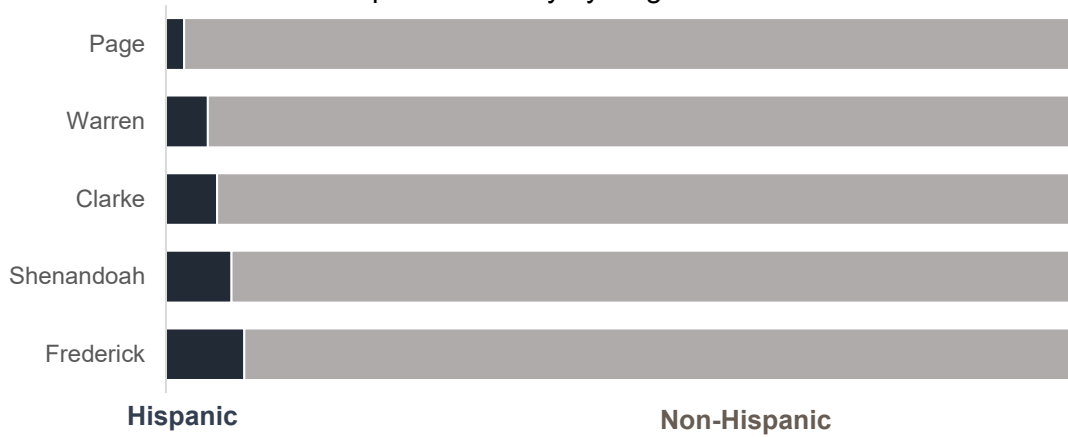


² US Census Bureau. American Community Survey 2019 5-Year Estimates. Table S0101.

³ US Census Bureau. American Community Survey 2019 5-Year Estimates. Table DP05.

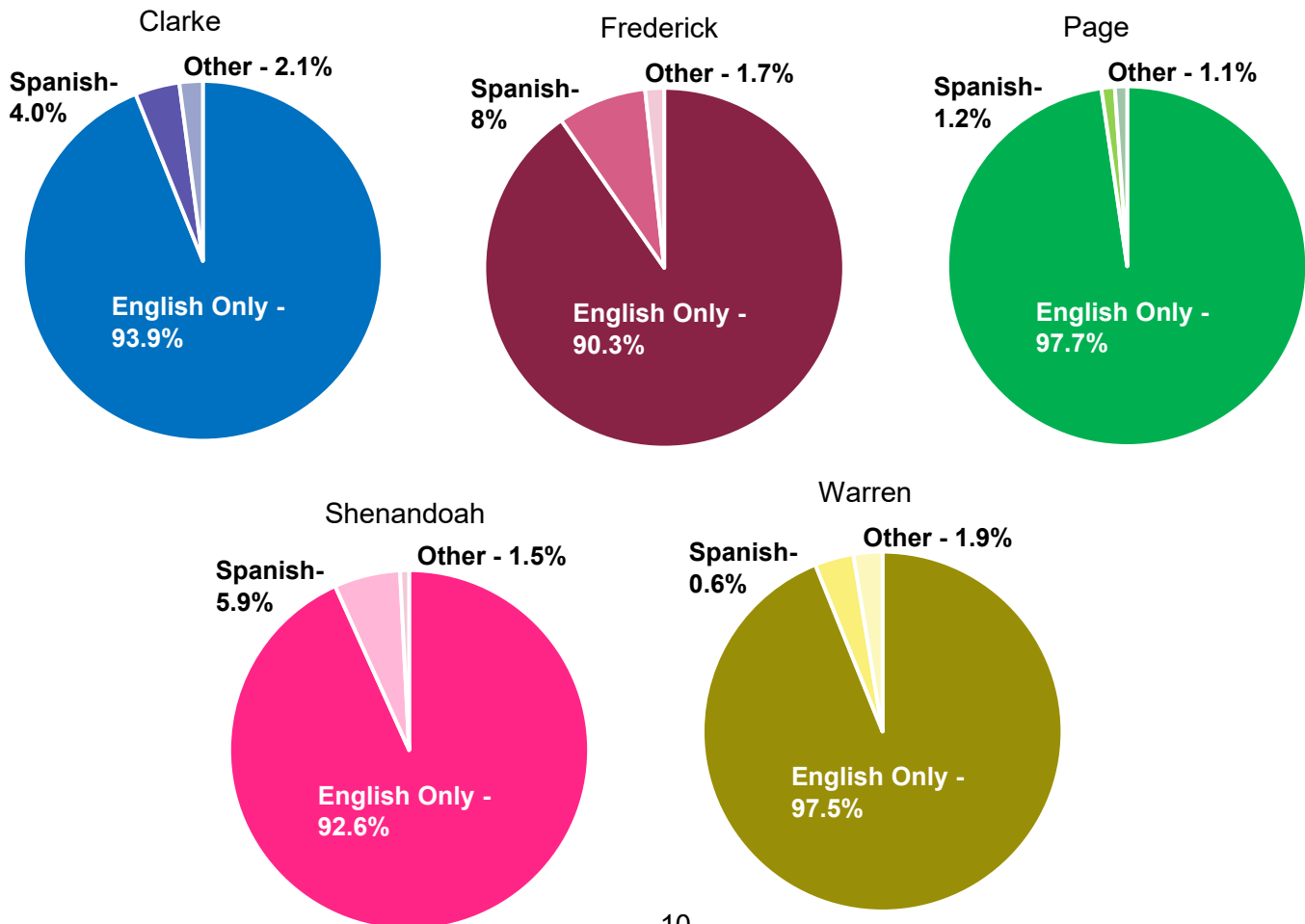
Similar to racial diversity, the Northern Shenandoah Valley also has minimal ethnic diversity. Only about 6.6% of the region's population identified as Hispanic or Latino.

4. Hispanic Ethnicity by Region



Closely tied to racial and ethnic identity is the language spoken at home by residents. In every county, almost all individuals speak English at home, though a small population speak Spanish or other languages.

5. Language Spoken at Home



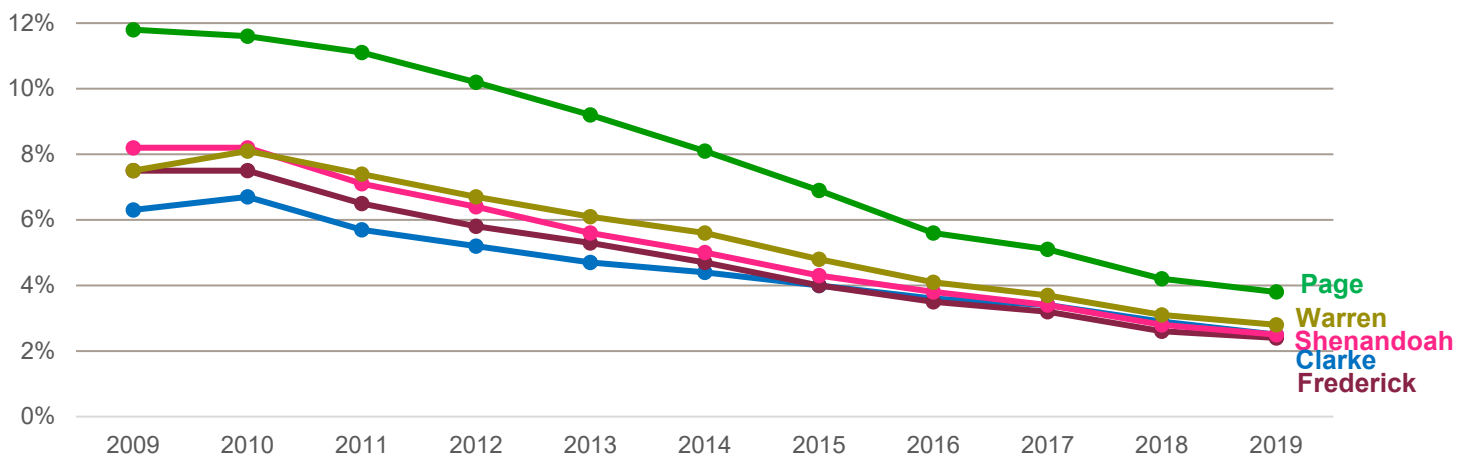


Jobs and Income

Across all localities, the largest individual need identified by community members was the ability to earn more income. This need was emphasized in focus groups and other surveys with all stakeholder groups indicating living-wage and fulfilling employment for community members as a top need.

Before the COVID-19 pandemic hit the state in March 2020, unemployment rates in the Northern Shenandoah Valley had been on a steady decline, reaching levels that were even lower than before the 2008 recession^{4, 5}

6. Annual Unemployment Rate by County



⁴ Bureau of Labor Statistics. Local Area Unemployment Statistics. Annual.

⁵ To see how recent unemployment rates have been impacted by COVID-19, please refer to the COVID-19 section.

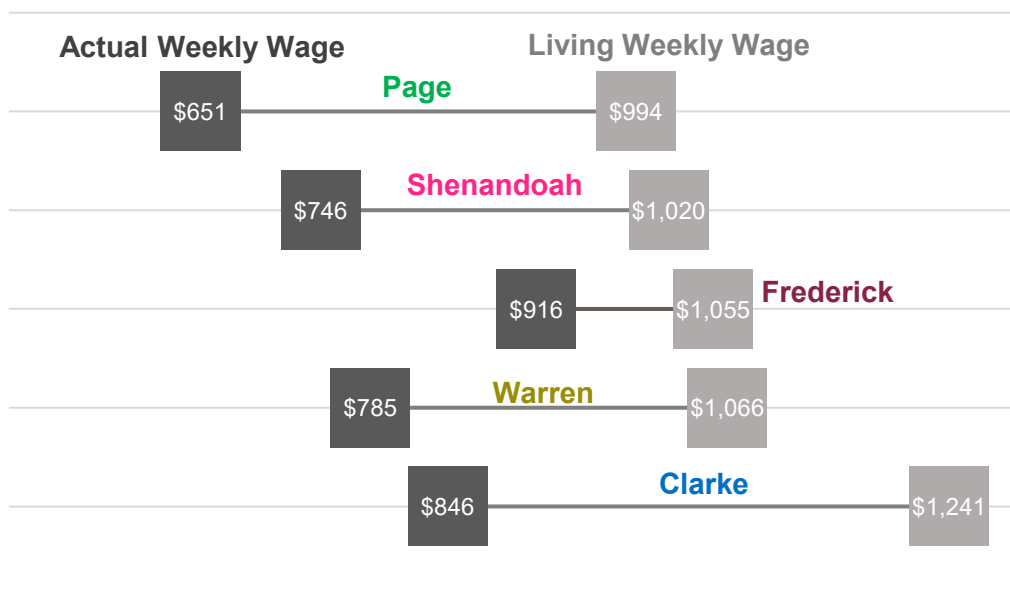
Feedback from stakeholders focused on two aspects of unemployment: quality of jobs and availability of jobs.

Quality Jobs/Wages

One of the most important factors contributing to a quality job is living-wage pay. Some of our focus group participants also described this as a “family-supporting” wage. In essence, living wage employment provides enough income from employment for a family to meet all of their basic needs like housing, childcare, and food. Unemployment steadily decreased in the last decade, but many of the jobs gained in the regions served by People Incorporated do not pay a living wage to their employees.

The table below compares the average weekly wage in each locality to the living wage weekly wage needed for a single parent with one child in each region.⁶ In every region, the average weekly wage is significantly less than a living wage, highlighting the discrepancy between wages and the actual cost of living.

7. Actual vs. Living Wage



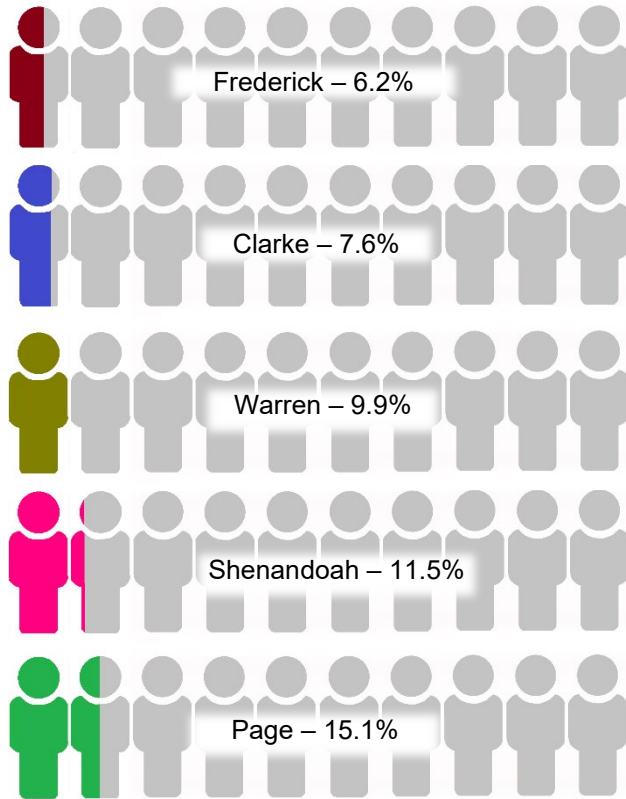
Without a living wage, many families in the communities served by People Incorporated end up living in poverty. Research shows that living in poverty can have life-long impacts on individuals’ health and well-being. Those growing up in poverty have higher rates of asthma, obesity, injury, and are less prepared for learning. In adulthood, those who faced poverty have higher mortality rates and poorer health in areas of physical disability, clinical depression, and premature death.⁷

⁶ 2020 MIT Living Wage Calculator. Retrieved December 2020.

Virginia Employment Commission. Quarterly Census of Employment and Wages. Annual Averages 2019.

⁷ Gupta, Rita Paul-Sen, Margaret deWit, and David McKeown. 2007. “The impact of poverty on the current and future health status of children.” *Paediatrics and Child Health* 12(8): 667-672.

8. Poverty Rates by Region

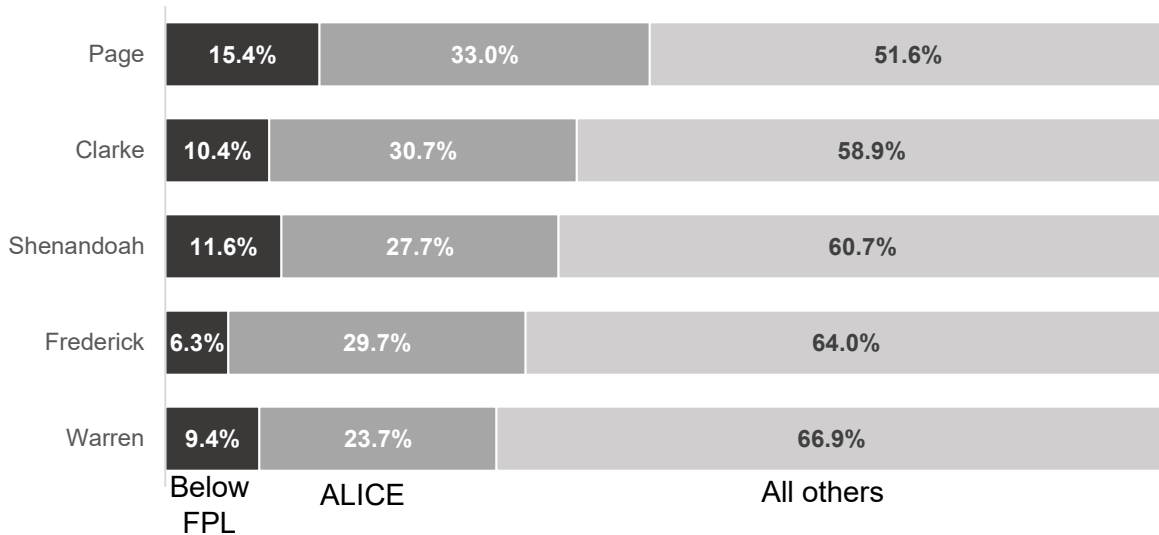


Poverty rates throughout the Northern Shenandoah Valley remain above Virginia's overall rate of 10.6%, but vary greatly among localities.⁸ Over 15% of the population in Page County is living in poverty. In Page, Shenandoah, and Warren Counties, over 15% of children live below the federal poverty line.

In the region, poverty rates are higher for women than men, higher for black residents than white residents, and higher for Hispanic residents than non-Hispanic residents.

An alternative definition of "living-wage" is provided through the ALICE concept – **asset limited, income constrained, employed**. ALICE households live above the federal poverty guidelines, but still struggle to make ends meet. ALICE families have income from employment, but still don't have enough to cover all of their expenses.⁹

9. ALICE Households by Region

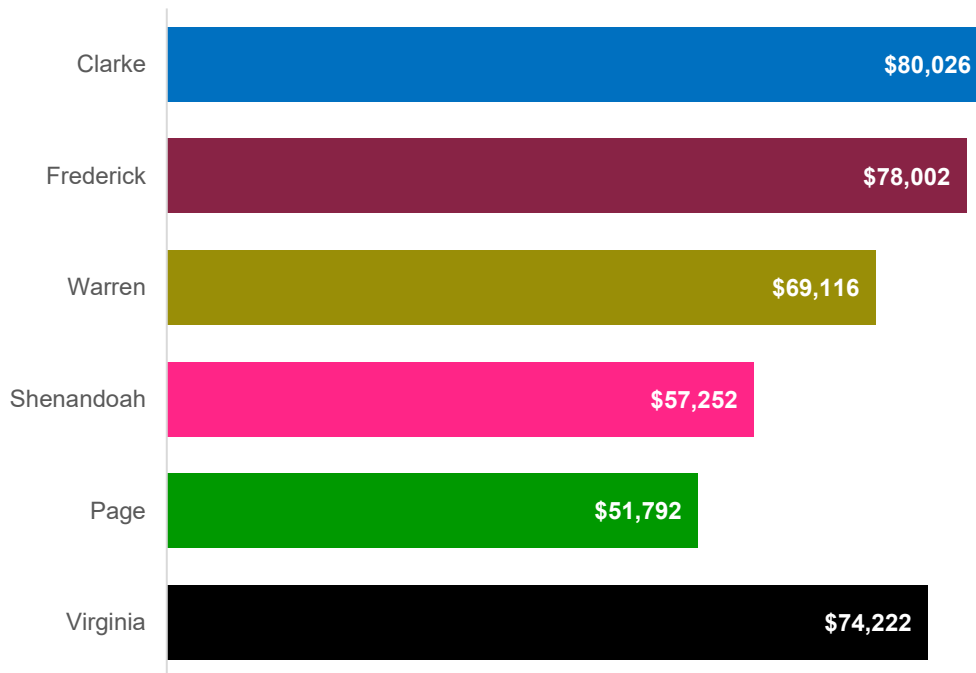


⁸ US Census Bureau. American Community Survey. 2019 5-Year Estimates. Table S1701.

⁹ 2018 County-level data. UnitedforALICE.org

One of the largest barriers that individuals face in obtaining living wage employment is a lack of skills and/or education. For example, in Warren County, median annual earnings for someone with a high school diploma are only \$34,716, but they rise to \$54,862 for someone with a bachelor’s degree. Within the Northern Shenandoah Valley region, Clarke County has the largest proportion of individuals with a bachelor’s degree or higher (32.2%) and Page the least (13.7%).¹⁰

10. Median Annual Household Income by County

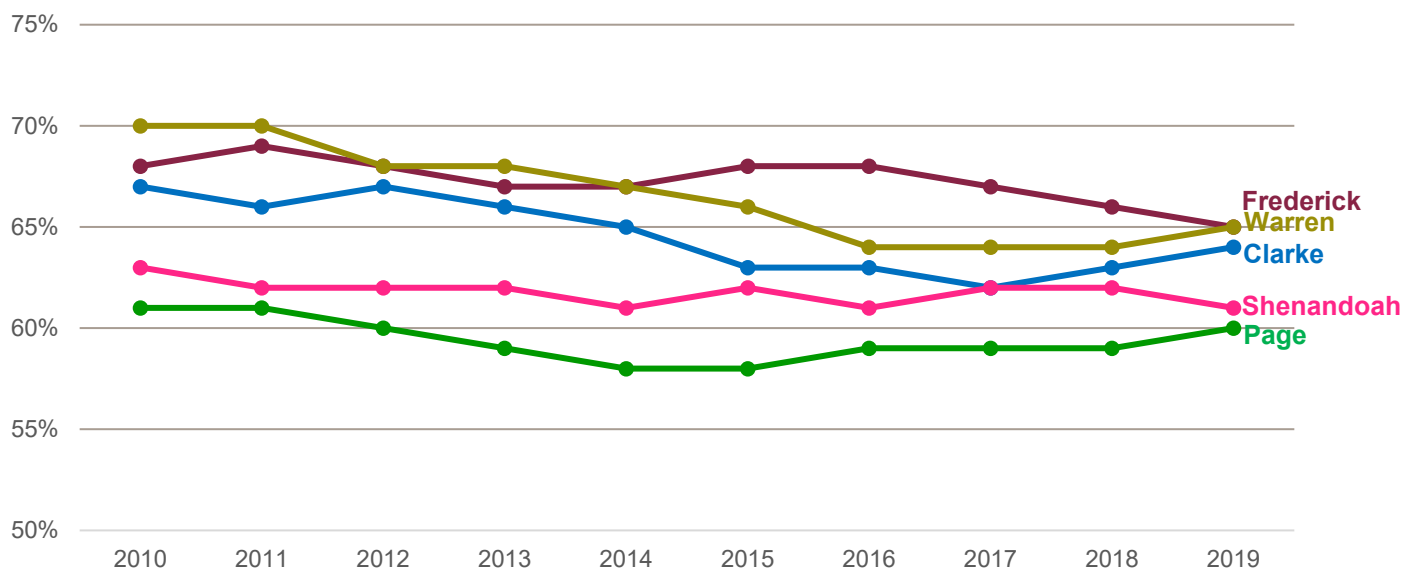


¹⁰ US Census Bureau. American Community Survey. 2019 5-Year Estimates. Table B25119.

Employment Opportunities

While unemployment rates are a key indicator of economic health, another important aspect of the labor market and employment in our communities is labor force participation. Labor force participation rate is the proportion of civilian adults over 16 who are working or actively looking for work. When someone who isn't working stops looking for work altogether, they move from the "unemployed" category to totally outside the labor force. In the last ten years, labor force participation has decreased in each county, with the largest drop in Warren, though Page and Shenandoah Counties have the lowest labor force participation rate overall.¹¹ While some of this is likely due to the aging population, with individuals leaving the workforce as they retire, some may also be attributable to the inability to find jobs that meet a person's skill level, interests, or that are attractive jobs in general.

11. Labor Force Participation by County



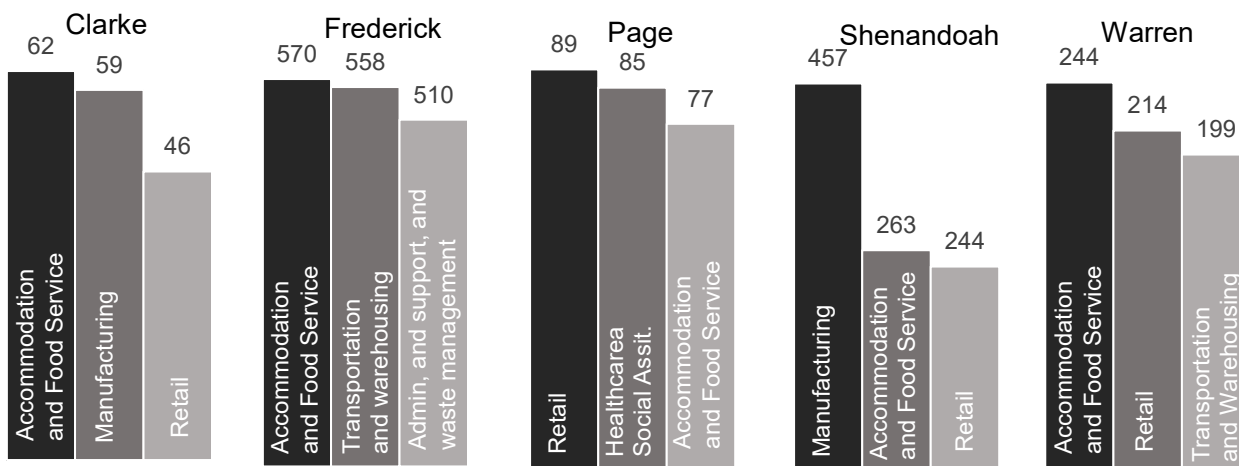
Survey respondents and focus groups participants described that in addition to community members wanting “good jobs,” they also talked about overall need for more job opportunities, particularly those accessible to low-income individuals.

Figure 12 displays the top three industries with the most hires in the first quarter of 2020 (pre-pandemic).¹² The low-paying industries of “accommodation and food service” and “retail” are some of the fastest growing across the region. So, while job opportunities may have been increasing in 2020, most of these jobs were not the high-quality opportunities desired by the community.

¹¹ US Census Bureau. American Community Survey 2019 5-year Estimates. Table DP05.

¹² US Census Bureau, Local Employment Dynamics. 1st Quarter 2020. Retrieved from Virginia Works Community Profiles.

12. New Hires by Industry – 1st Qtr 2020



In our community member survey, 36% of respondents from the Northern Shenandoah Valley region indicated that getting or keeping a job had been a problem for someone in their household in the last year.

Community Resources

While needs still remain related to jobs and employment, many community organizations have already stepped up and begun responding to the need.

Throughout Virginia, local workforce development boards invest time and funding to provide training and career support programs for residents, build employer networks to ensure jobs are available, and provide overall coordination for the workforce system by bringing together stakeholders.

In community member focus groups, individuals emphasized the need to align training programs with jobs that are available and industries that offer living wage work. Many of the workforce programs throughout our service regions are attempting to do just this. They are watching industry trends to guide individuals in careers where they are likely to find long-term employment.

Another theme throughout focus groups was that supports outside of traditional workforce training are needed to help with employment. Things like: quality, affordable, reliable childcare; transportation; and quality, affordable healthcare to ensure individuals are well enough to work.



Childcare

While quality, affordable childcare has long been a community need, underpinning other issues like employment and education, the remote schooling and dramatic closure of many childcare providers this year has brought this need to the forefront.

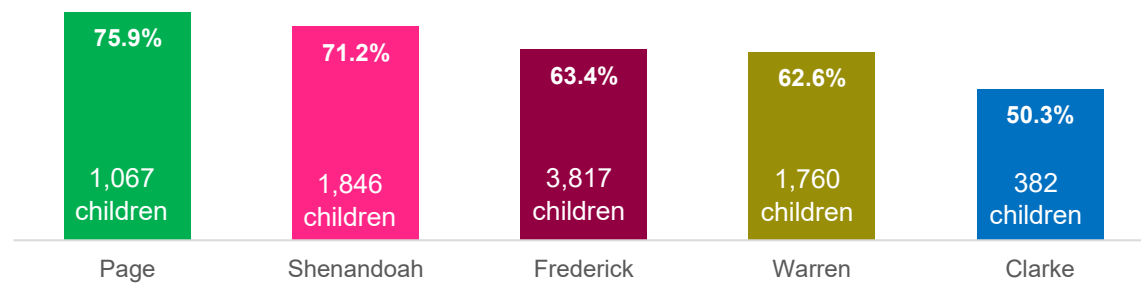
While Northern Shenandoah Valley respondents to the community member survey overall gave “affordable childcare” an importance rating of 4.58/10, parents of children aged 0-5 gave it a rating of 9.8/10. Finding quality childcare that fits within a family’s budget is a major need, especially for families where all adults are working.

Availability

The availability of childcare, at convenient locations and during all working hours, remains a struggle in many of the communities served by People Incorporated. As the number of individuals working has increased, so has the need for a safe place for their children to be.

By 2019, 65% of children under six in the Northern Shenandoah Valley region had all of their parents in the labor force.¹³

13. Proportion of Children Under 6 with all Parents in the Labor Force



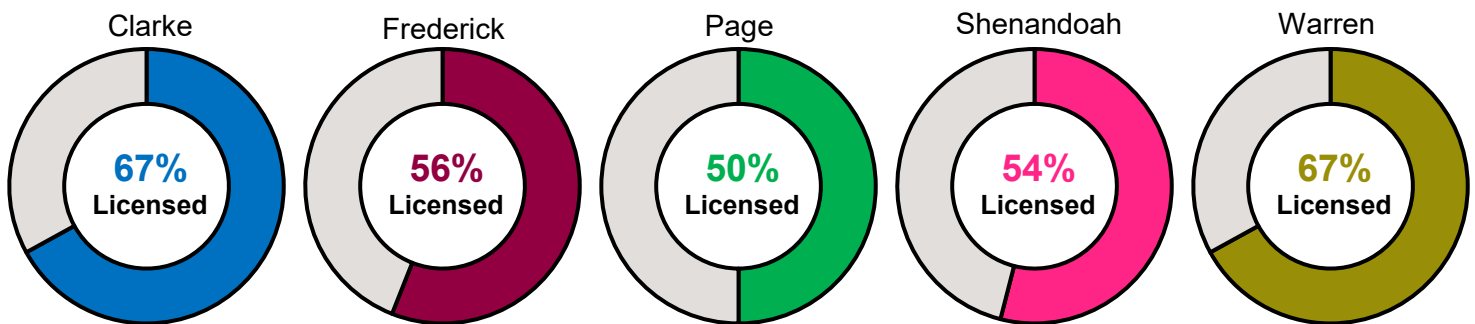
¹³ US Census Bureau. American Community Survey 2019 5-Year Estimates. Table B23008.

Quality

While having enough childcare available is important, having childcare options that provide a safe environment and promote development is equally important. According to the American Academy of Pediatrics, “high-quality early education and child care for young children improves physical and cognitive outcomes for children and can result in enhanced school readiness.” High quality care in the early years can have a lasting impact on children.¹⁴

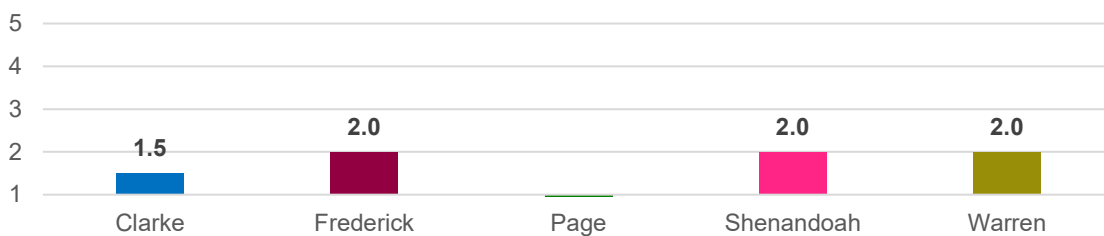
The first step in ensuring quality for childcare in Virginia is the licensing process. Currently, the Virginia Department of Social Services provides monitoring and oversight for licensed providers, and some groups of regulated unlicensed providers. Licensing ensures that providers are adhering to policy and regulation ensuring the safety of children. While many of the childcare providers in the communities served by People Incorporated are licensed, many family-day-home and religious based providers are not.¹⁵

14. Proportion of Registered Childcare Providers that are Licensed.



Over the last decade, Virginia has made a concerted effort to improve the quality of childcare and early childhood education programs through the Virginia Quality program. Virginia Quality is a continuous quality improvement and rating system focused on quality rating standards, regulating authority, and professional development. The system has five levels (1-5) with specific criteria for providers. While Virginia Quality has been implemented statewide, not all providers participate in the system. In Northern Shenandoah Valley, only about 10% of registered providers participate in the Virginia Quality rating system. Even with low participation overall, almost all Head Start centers in the region participate and have high ratings. The figure below shows the average Virginia Quality rating among participating providers in each county.

15. Average Virginia Quality Rating by Region



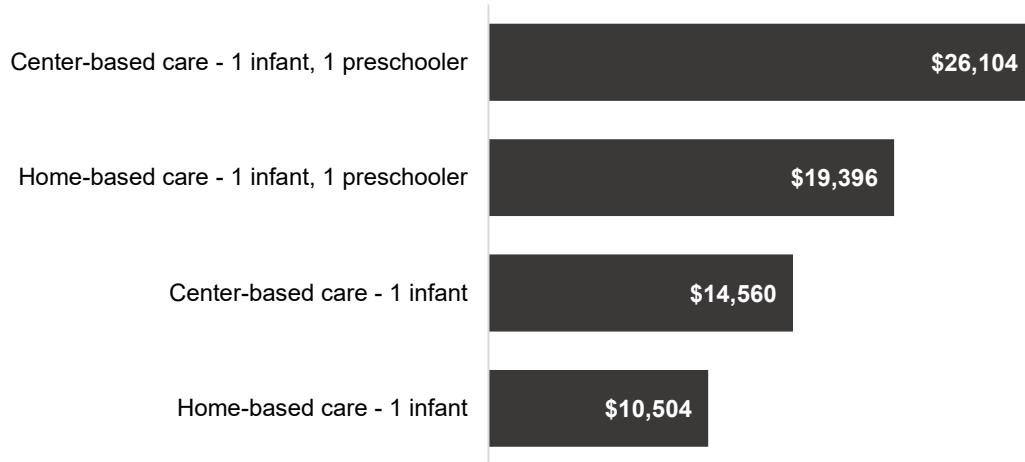
¹⁴ Donoghue, Elaine A. and Council on Early Childhood. 2017. “Quality Early Education and Child Care from Birth to Kindergarten.”

¹⁵ Virginia Department of Social Services. Child Day Care Search. Accessed January 2021.

Affordability

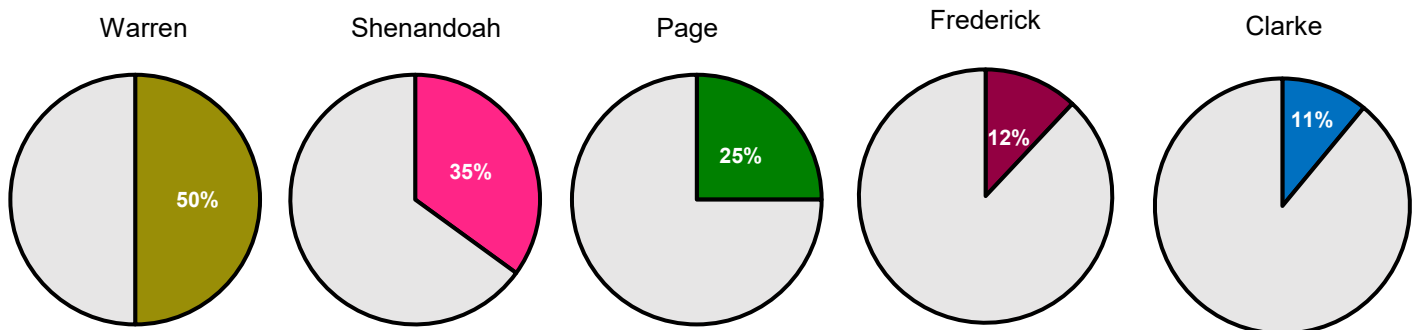
Even in areas that have a sufficient supply of high-quality childcare, affordability remains an issue for many families. In Virginia, the average annual cost for childcare is higher than that for tuition at a public four-year university institution.¹⁶

16. Annual Cost of Childcare in Virginia



In Virginia, someone working full-time at \$10/hour would only make \$20,800 a year, and would have to spend about half of their income on childcare given current costs in the state. Luckily, many childcare providers in People Incorporated's communities accept childcare subsidies, a program administered by the state Department of Social Services to offset the cost of childcare for lower-income families. Even so, some communities don't have enough subsidies available for the families that qualify, and some of the providers that accept subsidies don't provide all-day care.¹⁷

17. Proportion of Registered Childcare Providers who Accept Subsidies



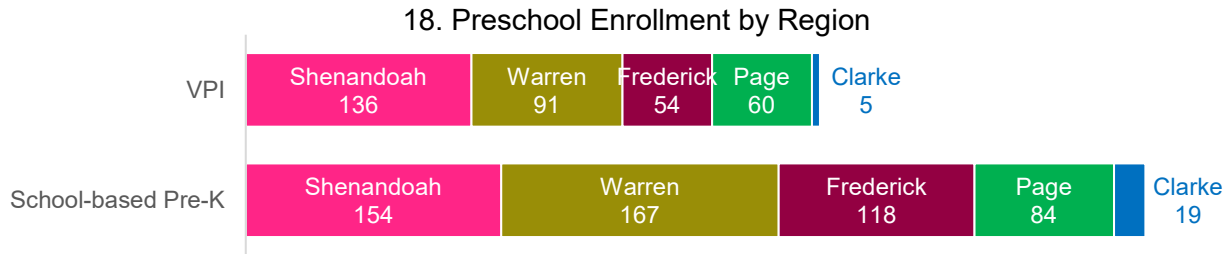
¹⁶ ChildCare Aware of America. *The US and the High Price of Child Care: 2019*.

¹⁷ Virginia Department of Social Services. Child Day Care Search. Accessed January 2021.

Public Support for Early Childhood Education

Title I and the Virginia Preschool Initiative have greatly expanded access to preschool for at-risk children, particularly 4-year-olds. Each locality provides publicly funded preschool and/or VPI slots for children at local elementary schools.¹⁸

The Virginia Department of Education and Virginia Early Childhood Foundation have worked to promote quality early childhood education for economically disadvantaged children through programs like their Mixed-Delivery and Preschool Development Grant programs, which support increasing the number of slots available and improving quality for disadvantaged groups.



In addition to programs operated through local schools, Head Start also serves an important role throughout People Incorporated's service area in preparing children with disabilities and/or economic disadvantage. People Incorporated provides Head Start services in the region, alongside other providers including Skyline CAP.

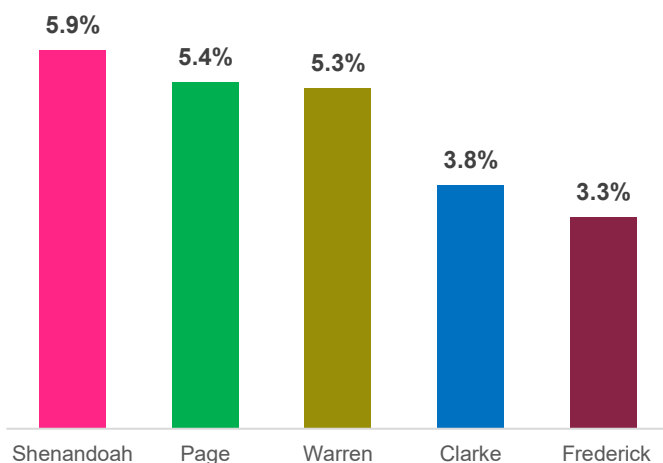
¹⁸ Kids Count 2019-2020 VPI 4-year-old enrollment *and* VDOE 2020-2021 Fall Membership Report.



Transportation

In focus groups, partners noted that transportation remains a major need for low-income people in the community. Having reliable transportation impacts individuals' abilities to attend education, get to work, and generally access services.

19. Proportion of Households with No Vehicle Available



Much of the Northern Shenandoah Valley is rural, and a personal vehicle is the only means of transit.¹⁹

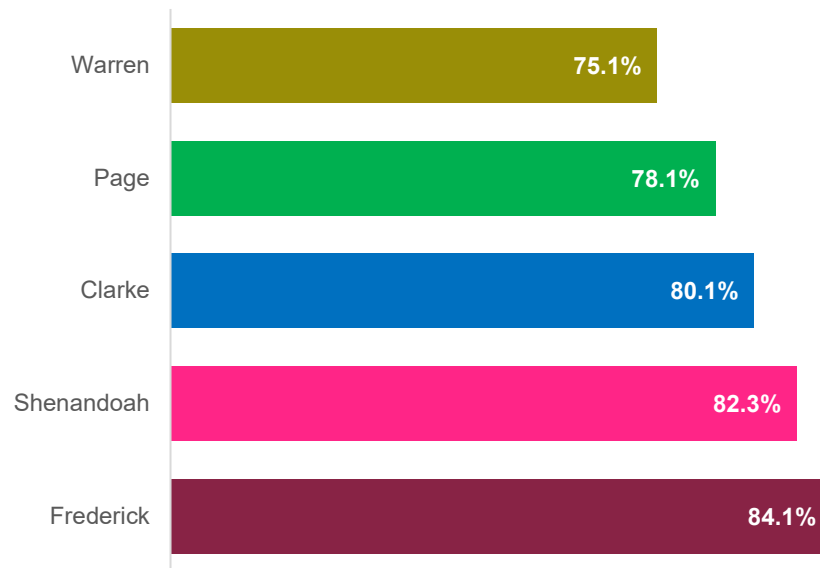
Few programs and supports exist to help families with acquiring and maintaining a personal vehicle. In our community member survey, respondents specifically noted that, even if they have a vehicle, they can't afford the cost of maintenance and repairs. And the vehicles that are more affordable for low-income families are older and less reliable. People Incorporated does offer affordable consumer loans for transportation as one way to address this need.

Reliable transportation is particularly important for employment. While some individuals rely on public transportation or carpooling, the majority of workers in the Northern Shenandoah Valley region drive alone in their own vehicle to work.²⁰

¹⁹ US Census Bureau. American Community Survey 2019 5-Year Estimates. Table B08201.

²⁰ US Census Bureau. American Community Survey 2019 5-Year Estimates. Table DP03.

20. Proportion of workers who drive alone to work



While personal transportation remains the primary means for most families, some still rely on public transportation systems. Some individual communities offer transportation solutions, such as the on-demand system in Clarke County or the trolley in Front Royal. However, these systems have very limited hours and limited destinations. Individuals who need transportation between localities have limited or no options, and riders would need to get transportation to a hub to access farther distance transit.



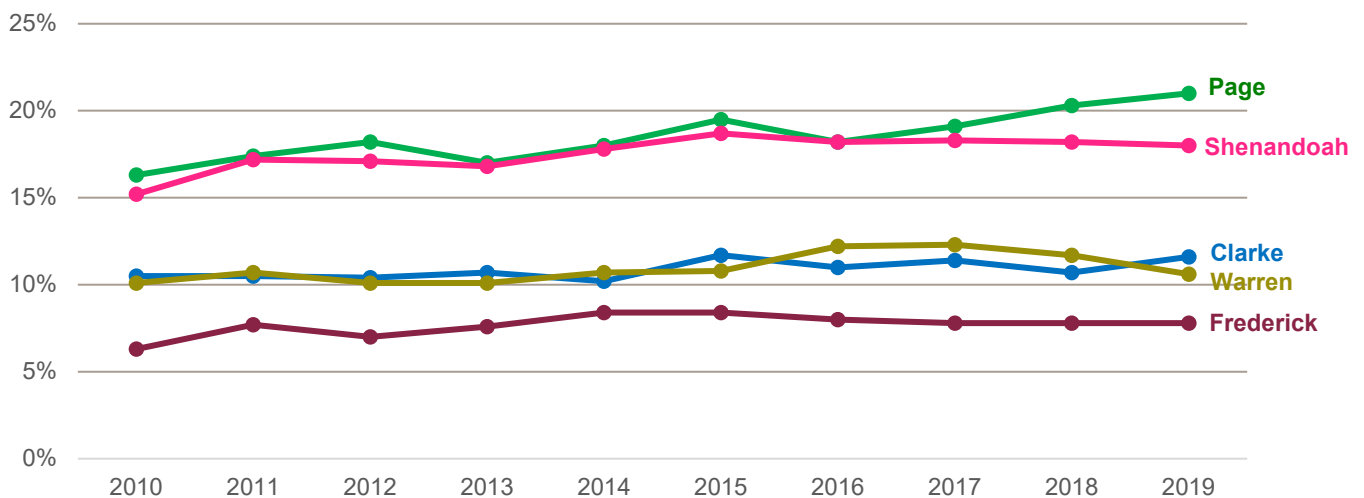
Housing and Homelessness

Looking back at People Incorporated’s history of needs assessments, the need for quality, affordable housing has remained consistently as a top need in all communities.

Availability

In the last decade, vacancy rates have slowly and steadily increased across the Northern Shenandoah Valley, with larger increases in the more rural localities of Page and Shenandoah counties.²¹ Increasing vacancy across the region runs along the same patterns as the decreasing population. Like many rural communities, outmigration to larger population centers for job opportunities affect housing occupancy rates.

21. Vacancy Rates by County



²¹ US Census Bureau. American Community Survey. 2019 5-year Estimates. Table DP04.

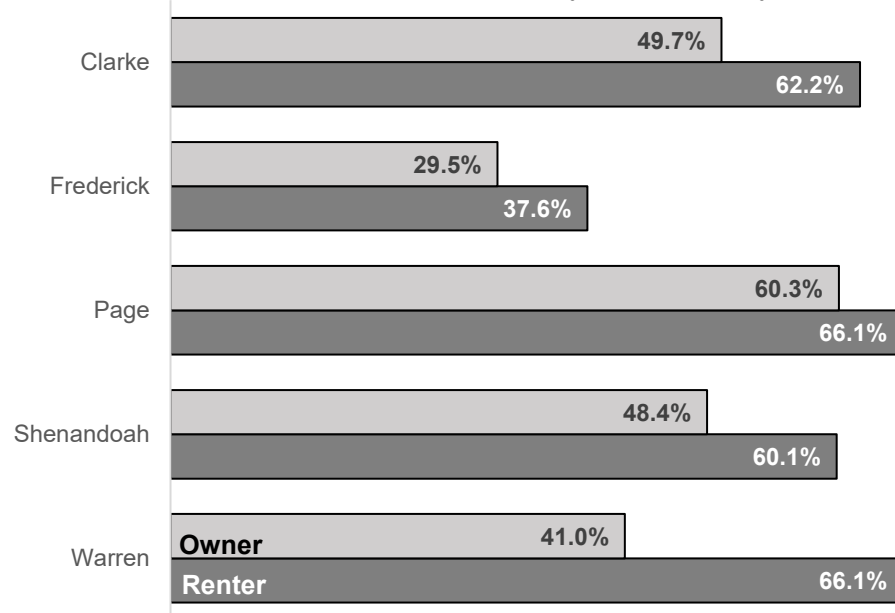
Even as vacancy increases, community members still discussed the difficulty of finding quality, affordable rental housing. As of 2019, the rental vacancy rate in Shenandoah County was only 3.5.²² Renters struggle to find housing available to them in their price range. In a focus group in Clarke County, community members expressed frustration at the high cost of rent for small apartments.

When asked about their greatest family need, this Northern Shenandoah Valley resident responded

“not enough income left over after rent and utilities.”

In addition to a limited quantity of homes available to community members with lower-income, quality is also an issue. In the Northern Shenandoah Valley region, 40.6% of units occupied by homeowners were built before 1980, but 54% of those occupied by renters were built before 1980.²³ Older homes, are more likely to face quality issues like inadequate weatherization or outdated plumbing and electrical. These issues can increase utility costs and even be safety hazards.

22. Proportion of Homes Built Before 1980 by Ownership Type



Affordability

Housing is often one of the largest expenses in a family’s budget. Over one-quarter of all households in the Northern Shenandoah Valley region are financially burdened by paying for housing (paying more than 30% of monthly income to housing).²⁴ Across the region, almost twice the percentage of rental households are burdened than homeowner households. According to the National Low Income Housing Coalition, Virginia has a large shortage of rental homes that are affordable to extremely low-income renters.²⁵

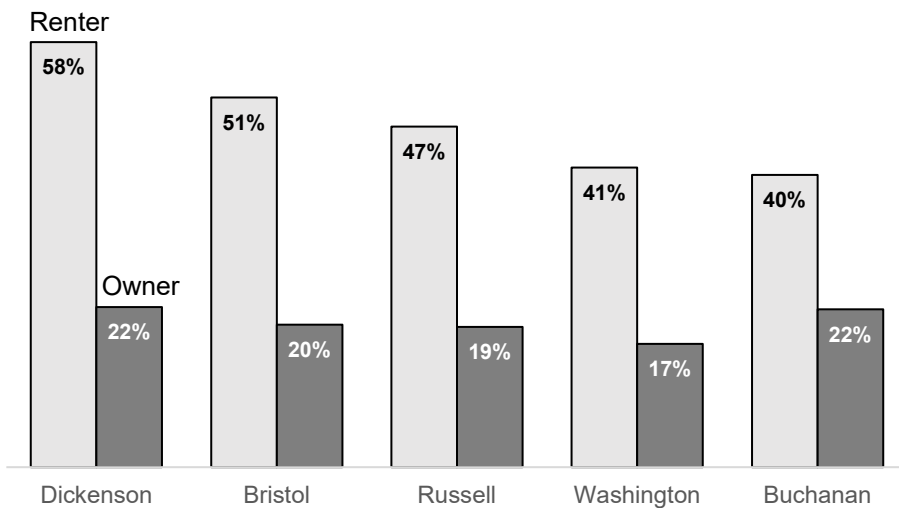
²² US Census Bureau. American Community Survey 2019 5-Year Estimates. Table DP04.

²³ US Census Bureau. American Community Survey 2019 5-Year Estimates. Table S2504.

²⁴ US Census Bureau. American Community Survey 2019 5-Year Estimates. Table DP04.

²⁵ National Low Income Housing Coalition. Housing Needs by State – Virginia. <https://nlihc.org/housing-needs-by-state/virginia>. Accessed January 2021.

23. Housing Cost Burdened Household by Type



When asked to identify the greatest need for their family, many community member survey respondents indicated safe and affordable housing.

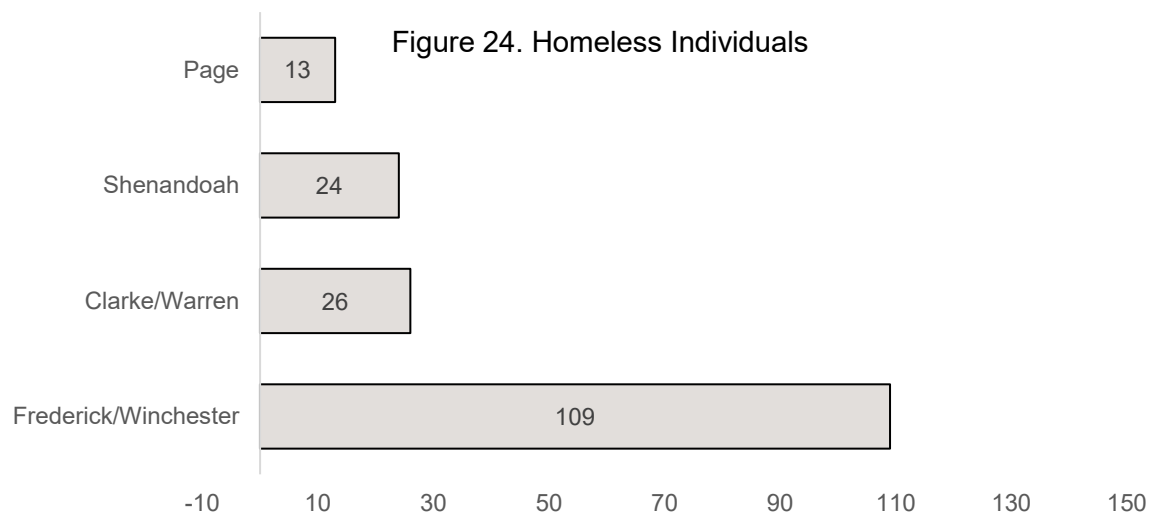
Among a list of fourteen different programs and services that could be important to a community, partners ranked “safe and affordable housing” as the third most important, with an average

importance score of 8.4/10. This importance was reiterated by partners stating that “affordable housing for low-income families” is the greatest need facing the communities they serve.

In our community member survey, over half of respondents from the Northern Shenandoah Valley region said they had chosen between paying for housing and paying for other basic needs in the last month.

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 providers work to count the literally homeless individuals in emergency shelter, transitional housing, or unsheltered on a single night each January.²⁶



²⁶ Western Virginia Continuum of Care, 2020 PIT Count



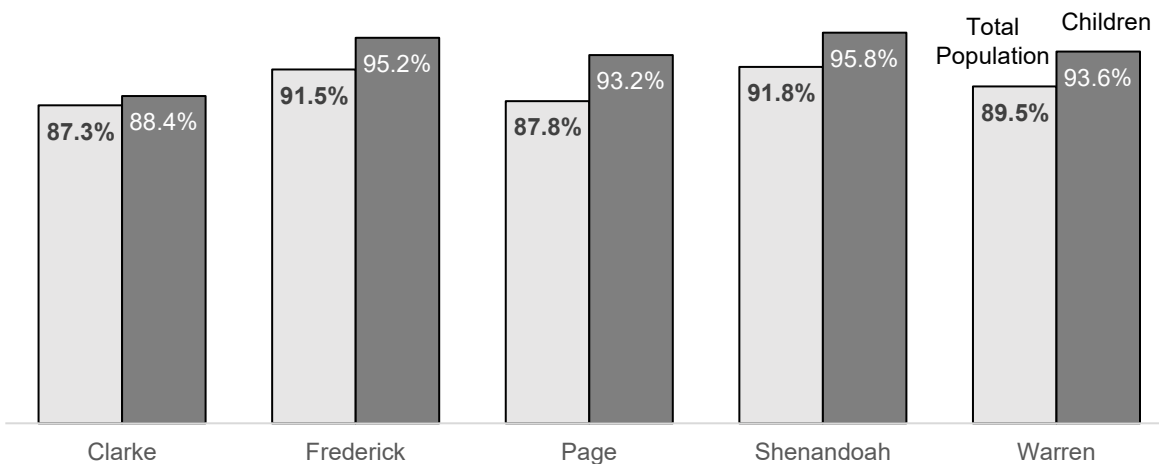
Health

When asked to name the single greatest need in their community, partners listed health related needs including COVID-19 concerns, substance abuse, and mental health issues. Input from staff, board members, and community members also show that health needs rank at the top for individuals and communities.

Access to Affordable Healthcare

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.

25. Insurance Coverage Rates



While insurance coverage rates for children remain high across all localities, almost 10% of the population in the Northern Shenandoah Valley has no insurance. Additionally, the percentage of the population that's uninsured is almost double for those with incomes below \$25,000 compared with those with higher incomes.²⁷

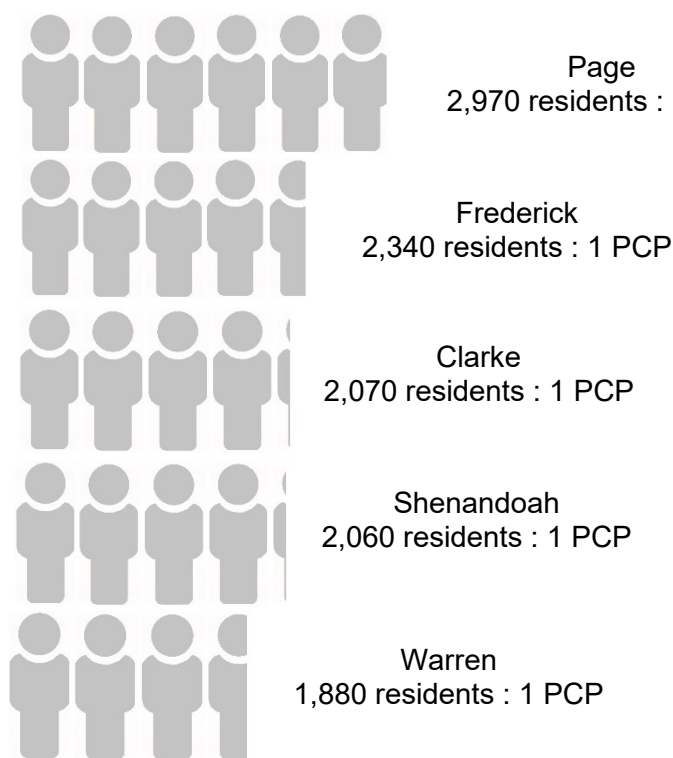
²⁷ American Community Survey 2019 5-year Estimates. Table S2701

In 2019, Virginia expanded its Medicaid program, making over 400,000 more people eligible to be covered. By late 2020, likely as a result of the economic and health issues related to COVID-19, almost 500,000 people had become eligible. The expansion of Medicaid also made health insurance much more affordable for those who had previously made too much to qualify, but too little to afford premiums through other insurance.²⁸

Even with this additional coverage, 29.4% of Northern Shenandoah Valley respondents to the community member survey said that health insurance premiums are too expensive, and another 58.8% said that out-of-pocket health care costs are too high.

Many of the communities served by People Incorporated also lack sufficient providers for both primary care and dental care. All of People Incorporated’s regions have fewer providers per resident than the state overall. And 35% of Northern Shenandoah Valley community member survey respondents said they have difficulty finding medical providers and getting appointments. For dental providers, every county in the region has fewer providers per person than Virginia overall.

26. County Residents per Primary Care Provider



The situation is similar for both primary care physicians and mental health providers. For primary care, again, each Northern Shenandoah Valley locality has more residents per provider than Virginia overall, emphasizing the shortage of care providers.²⁹

Research from the NIH supports the need for robust primary care systems. Stronger primary care systems are associated with better population health outcomes including reduced hospitalization for ambulatory care conditions, higher birth weights, and improved satisfaction with the health care system.³⁰

Those areas hardest hit by provider shortages are usually rural. Rural communities across the region face long distances to reach medical and dental care, particularly if an individual needs specialized care beyond what is locally available.

Even with these barriers, a wide variety of resources available to help with health and dental care. For those that aren’t covered by Medicaid, local free/affordable clinics, like the Shenandoah Community Health Clinic, are essential for affordable, quality care.

²⁸ Healthinsurance.org, “Virginia and the ACA’s Medicaid Expansion.” December 2, 2020.

²⁹ County Health Rankings and Roadmaps. NPI Registry.

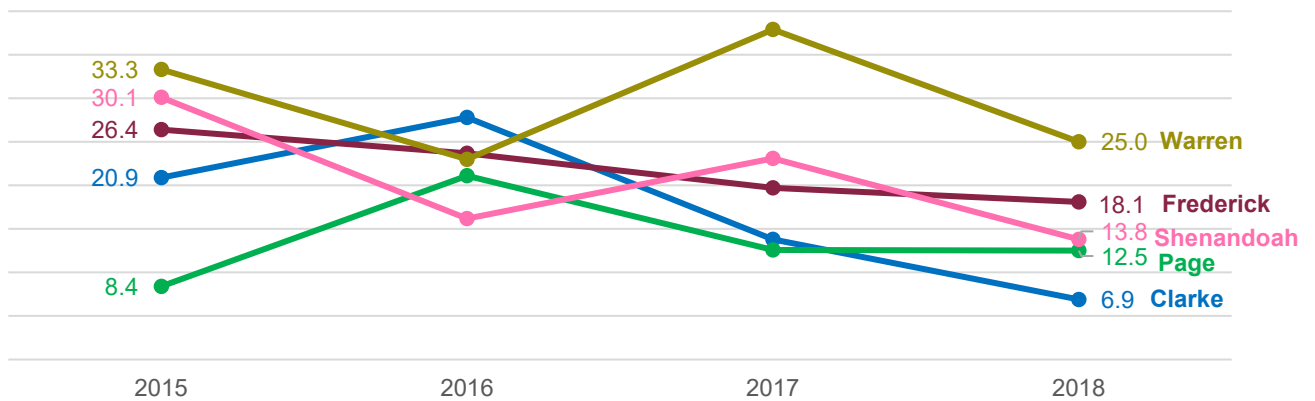
³⁰ Shi, Leiyu. 2012. “The Impact of Primary Care: A Focused Review.” *Scientifica*.

Substance Abuse and Mental Health

In surveys and focus groups, community members, partners, and staff said that mental health and substance abuse issues are some of the greatest needs facing the community right now.

While drug overdose rates have decreased over the past few years in the Northern Shenandoah Valley, rates still remain higher than Virginia's rate of 15.0 in multiple localities counties.³¹

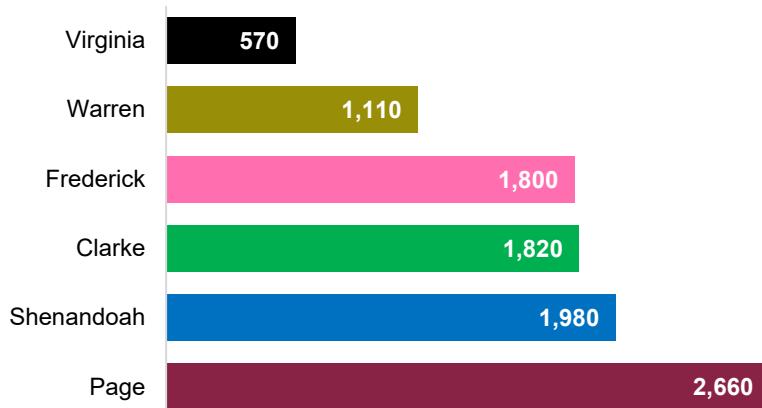
27. Drug Overdose Death Rates (per 100,000)



In rural areas, the few mental health services that are available may not have enough providers to serve the population, and individuals do not have the resources to access services farther away or those that are private pay.

Much like the dental and primary care provider shortage described above, Northern Shenandoah Valley communities as face a shortage of mental health providers. For Virginia, there are 570 residents per mental health provider. But, our more rural communities, like each community in the Northern Shenandoah Valley have much fewer providers.³²

28. Residents per Mental Health Provider



Throughout Virginia, and in each community served by People Inc., a local Community Services Board serves as the community mental health provider, often serving as the primary mental health and substance abuse service provide for those with publicly funded insurance. In focus groups, partners noted that the CSBs are overwhelmed with

³¹ Virginia Department of Health. Opioid Indicators Dashboard.

³² County Health Rankings and Roadmaps. NPI Registry.

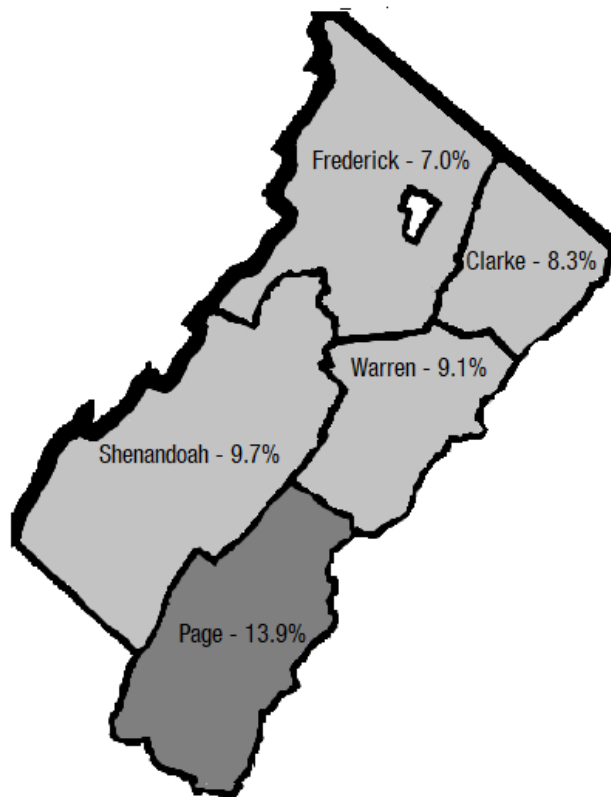
the demand for services. Partners also discussed the ripple effects that substance abuse can have on the entire family and community of the affected individual.

Some of the communities served by People Inc. have been proactive in addressing substance abuse issues by implementing innovative solutions. Page County in People Inc.'s Northern Shenandoah Valley region operates a drug court program. Drug Courts offer an alternative to traditional jail time, promoting recovery with treatment and many supportive services.³³ Most counties in the region also operate local substance abuse coalitions, falling under the umbrella of the Northern Shenandoah Valley Substance Abuse Coalition. These coalitions work to educate and engage communities in addresses the epidemic of substance abuse.³⁴ Local communities are coming together across People Incorporated's footprint to address the needs of those impacted by substance abuse.

Food and Nutrition

In our community member survey, 20% of respondents in the region responded that someone in their household had gone hungry in the last year because they were not able to get enough food. Many families are food insecure, meaning they do not have access to enough food for an active, healthy lifestyle for all household members or limited or uncertain availability of nutritionally adequate foods.³⁵

29. Food Insecurity Rate



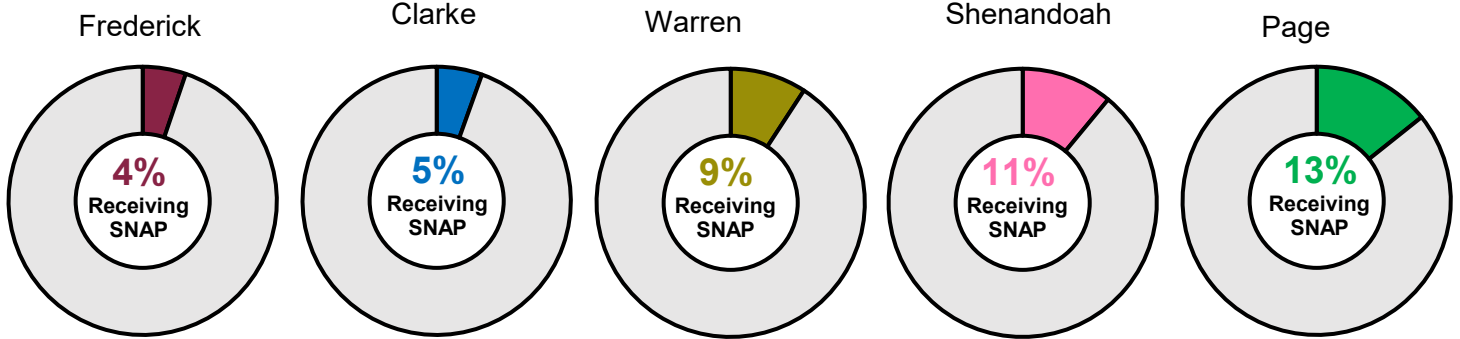
³³ Virginia Court System, Drug Treatment Courts. <http://www.courts.state.va.us/courtadmin/aoc/djs/programs/sds/programs/dtc/home.html>. Accessed 3/16/2021.

³⁴ <https://stopsubstanceabuse.com/about-us/>. Accessed 8/26/2021.

³⁵ Feeding America. Map the Meal Gap. 2018

67% of respondents to the community member survey who had issues with food security in the last year said they had used SNAP to help with food costs, and 56% had used a food bank or food pantry. Many families across People Incorporated’s communities rely on this program, and local food banks, to have adequate food. Across the Northern Shenandoah Valley region, 7.8% of households, over 6,000 households, receive SNAP benefits.³⁶

30. Proportion of Households Receiving SNAP



In the community member survey, respondents said that the greatest need facing their family was an inability to afford food after paying other bills like housing costs.

³⁶ US Census Bureau. American Community Survey. 2019 -Year Estimates. Table S2201.



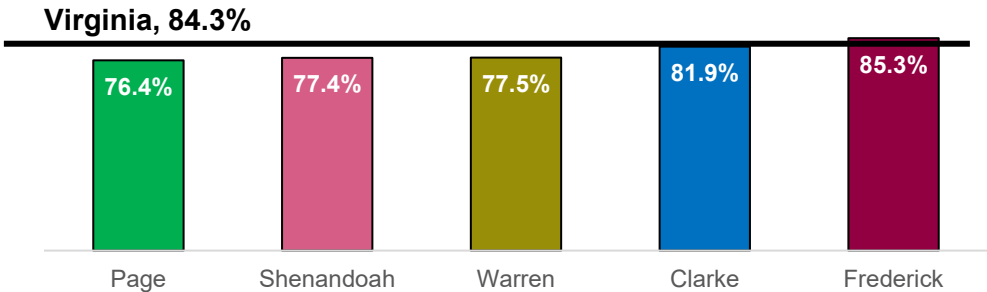
Education

Education from early childhood through adulthood plays a large role in the socio-economic success and well-being of families. Education impacts earnings, relationships, and life trajectory for many individuals. Many community members said that education was the single greatest need for their family, and focused on specific issues like affording post-secondary education, issue with virtual learning, keeping youth engaged in school, and quality early childhood education.

Kindergarten Readiness

Entering school ready to learn can have significant long-term benefits for children on future education, employment, earnings, marriage, and health.³⁷ For the 2019-2020 academic year, 84% of children in Virginia entered kindergarten with appropriate ready levels. The only locality with readiness levels higher than the state was Frederick County at 85.3%.³⁸

31. 2020 Kindergarten Readiness Rates



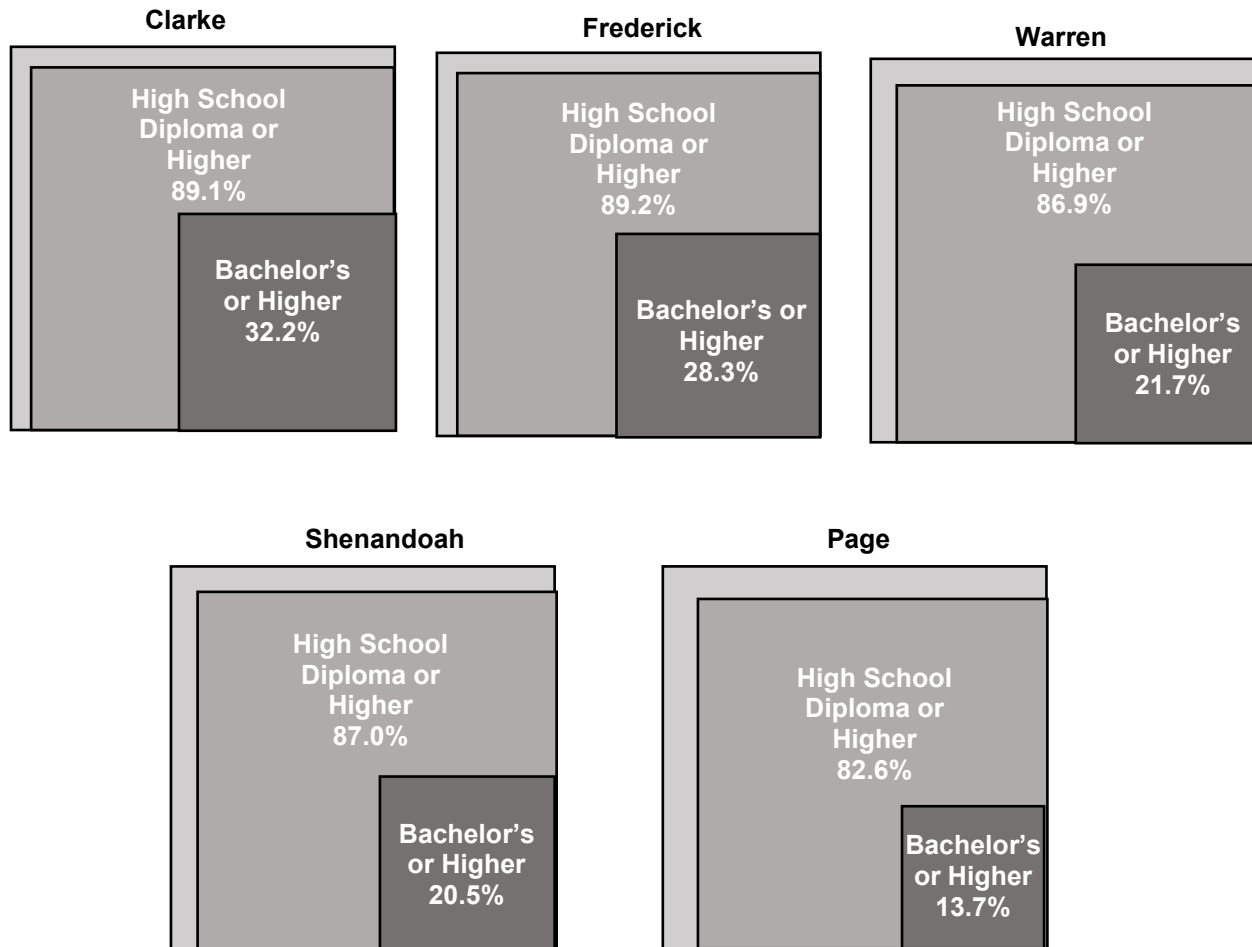
³⁷ Heckman, James, Rodrigo Pinto, and Peter Svlyev. 2013 “Understanding the Mechanisms Through Which an Influential Early Childhood Program Boosted Adult Outcomes. *American Economic Review* 103 (6).

³⁸ Fall 2019 PALS-K. Annie E. Casey Kids Count Data Center.

Educational Attainment

Educational attainment varies across each region, with Clarke County having the highest proportion of residents over 25 with a bachelor's degree or higher.³⁹

32. Educational Attainment by Region



Educational attainment has large impacts on earnings for in all localities. For example, in Warren County, median annual earnings for someone with a high school diploma are \$34,716 but are \$54,862 for someone with a bachelor's degree.

³⁹ US Census Bureau. American Community Survey 2019 5-Year Estimates. Table S1501.

While college degrees greatly increase income, even having a high school diploma increases income. In Clarke County an individual with a high school diploma or equivalent has median annual earnings of \$35,694, while those without only make \$21,983 a year.⁴⁰

33. On-Time Graduation Rates



⁴⁰ US Census Bureau. American Community Survey 2019 5-Year Estimates. Table S1501.

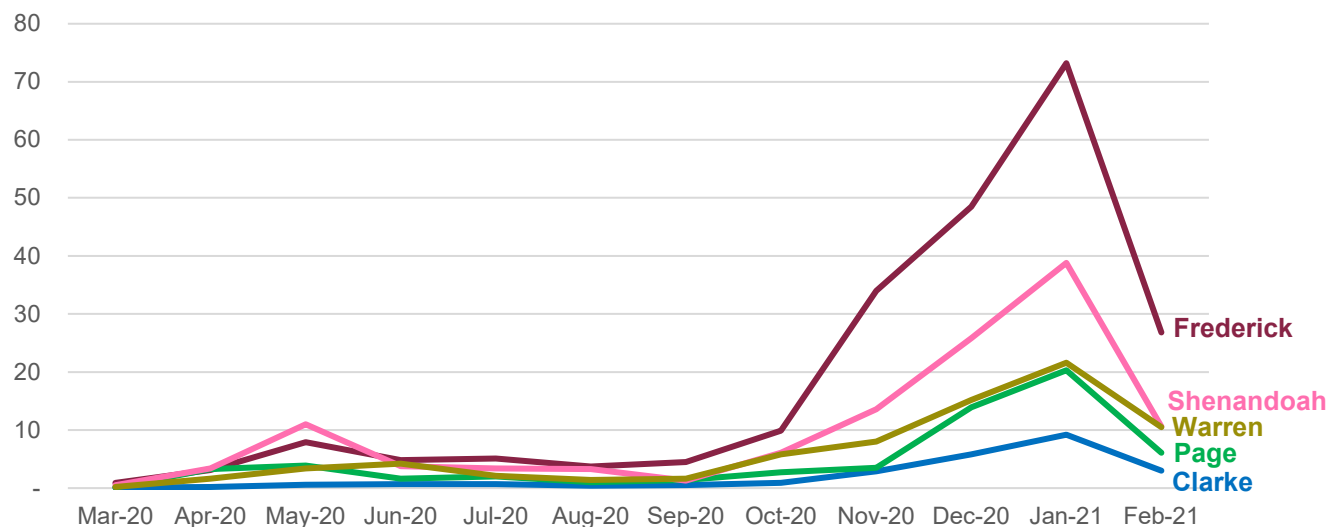


COVID-19

In January 2020, the first case of novel coronavirus disease 2019 (COVID-19) in the US was confirmed by the CDC. In the last year, almost 25 million people in the United States have had the disease and over 500,000 have died.⁴¹ Social restrictions in place to prevent disease spread have stressed the US economy. Likewise, healthcare, education, and social service systems have had to rapidly adapt to a constantly changing environment.

Cases in Northern Shenandoah Valley communities had their first small peak in May 2020. Then, new cases by month steadily increased up through January.⁴² With vaccinations becoming more widely available new cases began to decrease once again.

34. Average Daily New Cases by Month and Region



⁴¹ US Centers for Disease Control and Prevention. Total Cases and Deaths as of February 2021.

⁴² Virginia Department of Health. VDH Public Use Dataset. Cases at locality level. Retrieved March 2021.

Even so, the impacts of COVID-19 continue. Throughout focus groups and surveys conducted in late 2020 and early 2021, stakeholders from across People Incorporated’s service regions mentioned the impact of COVID-19 over and over. COVID-19, and the subsequent changes to economies and systems, have impacted housing, employment, education, childcare, health, transportation, and just about every aspect of the individuals’ lives. The findings below highlight how the communities served by People Incorporated have been most heavily impacted.

Health and Mental Health

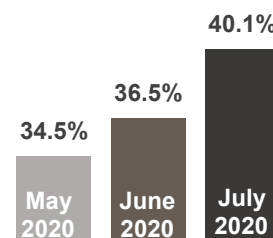
Fifty-two percent of community members from the Northern Shenandoah Valley responding to our Needs Assessment survey indicated feelings of increased concern for their health and the health of their family due to COVID-19. Understandably, much of this concern is likely due to high rates of infection across communities and the severity of symptoms possible if COVID-19 is contracted. Nationwide, data suggest that adults of any age with conditions like cancer, kidney disease, obesity, diabetes, and many others are at an increased risk of severe illness because of COVID-19. Additionally, older adults are at a greater risk of requiring hospitalization or dying if they are diagnosed with COVID-19; eight out of ten COVID-19 deaths in the US have been in adults 65 years old and older.⁴³ The table below displays prevalence of some of these risk factors in the Northern Shenandoah Valley region.

35. COVID-19 Risk Factor Prevalence by County			
	% Population 65+⁴⁴	Adult Smoking Prevalence⁴⁵	Adult Obesity Rate
Clarke	21%	15%	26%
Frederick	17%	14%	31%
Page	21%	18%	36%
Shenandoah	21%	16%	33%
Warren	16%	16%	32%
Virginia	16.5%	16%	30%

While COVID-19 has a very obvious impact on physical health, the pandemic has also impacted individuals’ mental health. In our community member survey, 35% of Northern Shenandoah Valley respondents indicated that they feel more alone and isolated because of COVID-19.

Recent research from the Kaiser Family Foundation showed that many adults reported negative impacts on health and wellbeing because of coronavirus, including difficulty sleeping or eating, increases in alcohol consumption or substance abuse, and worsening chronic conditions. Isolation and increased economic stress due to job loss can exacerbate these mental health issues.⁴⁶

36. Average Share of Adults Reporting Symptoms of Anxiety or Depression



⁴³ US Centers for Disease Control and Prevention. COVID-19 People at Increased Risk. Accessed January 19, 2021.

⁴⁴ US Census Bureau. American Community Survey: 2019 5-year estimates. Table S0101

⁴⁵ County Health Ranking and Roadmaps. Retrieved January 19, 2020.

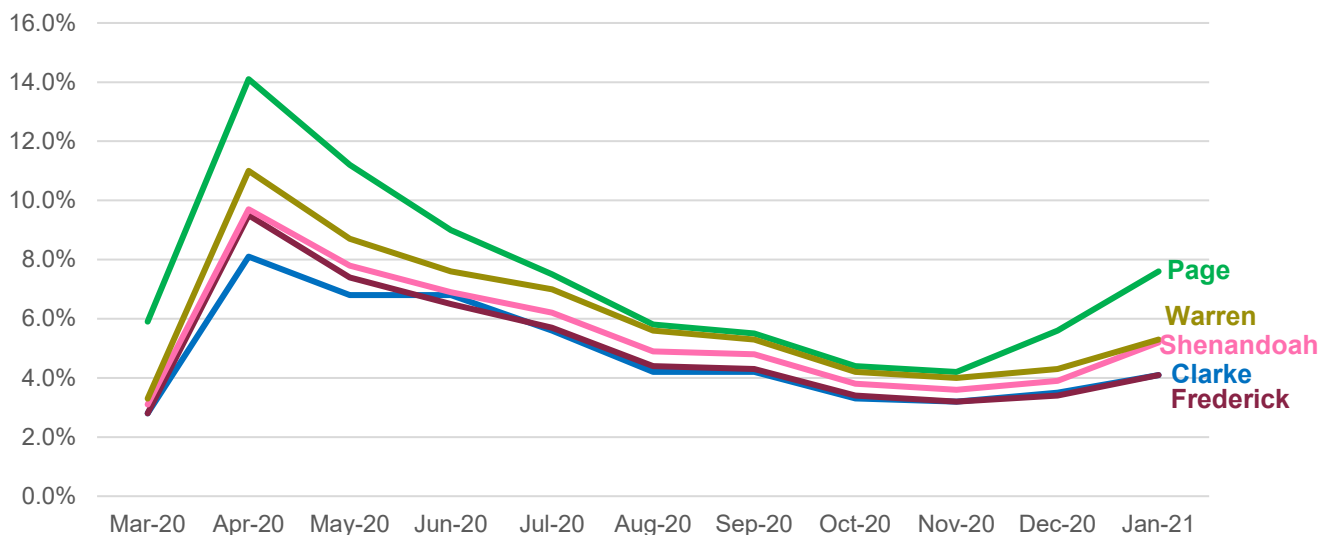
⁴⁶ Panchal, Nirmita, Rabah Kamal, Kendal Orgera, Cynthia Cox, Rachel Garfield, Liz Hamel, Cailey Munana, and Priya Chidambaram. August 21, 2020. *The Implications of COVID-19 for Mental Health and Substance Abuse*. Kaiser Family Foundation.

Even while the instance of mental health issues is on the rise, focus group participants noted that accessing services is more difficult. Many services are only available through telemedicine, creating a barrier for those without internet access.

Employment

Unemployment across the Northern Shenandoah Valley jumped in April of 2020, following a long trend of increased employment. While unemployment rates have dropped in the subsequent months, they still remain higher than pre-COVID 19 rates.⁴⁷

37. Monthly Unemployment by Region



In People Incorporated’s community member survey, 45% of Northern Shenandoah Valley respondents indicated they had experienced a layoff or furlough from a job because of COVID-19. Workers in industries like hospitality and food service, who are typically lower income, were especially hard hit.

In addition, COVID-19 is an obstacle as people continue to look for a working environment where they will be safe. Sixty-seven percent of Northern Shenandoah Valley survey respondents who said they’d had trouble getting a job in the last year said that health concerns due to COVID-19 have been a major issue in getting or keeping a job.

While increased unemployment benefits have helped many, families with limited technology skills and access have had difficulty accessing benefits or applying for new jobs electronically.

On a larger scale, many of the communities in rural areas depend on tourism as a key economic driver. The Governor’s stay-at-home order that was in effect for much of the spring and summer of 2020 negatively impacted revenues for businesses and localities. The Virginia Tourism Corporation, estimates that total tourism spending in Virginia is likely down at least 34% in 2020 compared with 2019, with over 50,000 jobs supported by tourism spending lost in the state.⁴⁸

⁴⁷ Virginiaworks.com. Local Area Unemployment Statistics. Monthly unadjusted.

⁴⁸ Virginia Tourism Commission. *COVID-19’s Impact on Virginia’s Visitor Economy*. September 10, 2020.

Education

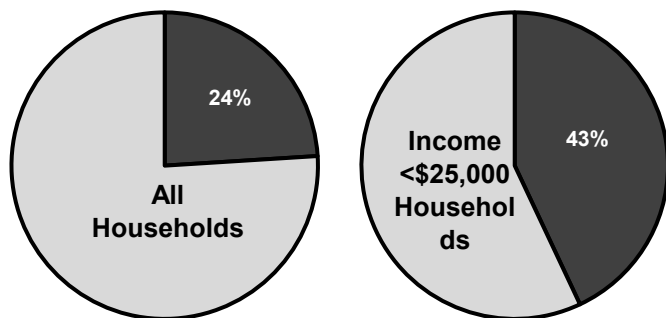
When the pandemic hit in March 2020, Virginia's Governor quickly moved to close K-12 schools to in-person instruction for the remainder of the academic year. This closure had an immediate impact on children's learning. Children with less access to resources (broadband internet, computers, language barriers, etc.) are most at risk for suffering learning loss during a protracted period of school closure. Multiple respondents to our community member survey said that the greatest need facing their family was being able to get kids back to school in-person. Parents said that virtual schooling was impacting the mental health of their children, and that they are generally struggling academically with this format.

By December 2020, almost all schools in the communities served by People Incorporated had resumed in-person instruction to some degree, with many also offering an all-virtual option. And with significant roll-out of vaccines to educators, full time in-person instruction is now resuming in many districts.

Housing

In our community member survey, 45% of respondents said that they have been unable to pay for housing costs because of the COVID-19 pandemic. In focus groups, partners said that COVID-19 has impacted the housing market in many ways. For some families, job loss means that they are unable to pay their rent or mortgage. And, with eviction moratoriums in place well into 2021, there isn't much turnover in rental properties. This means that it's difficult to find homes for families who need housing, and that there is little to no movement on waitlists for affordable housing.

38. Virginia Households with Slight or No Confidence in Ability to Pay Rent



According to the Census Household Pulse Survey, a survey designed to quickly assess the impact of COVID-19 in the US, almost one quarter of Virginia households had no or only slight confidence in their ability to pay next month's rent, as of March 2021. But, for household with income under \$25,000, 43% have slight or no confidence in ability to pay next month's rent.⁴⁹

Virginia has expended hundreds of millions of dollars to cover housing costs for those impacted by the pandemic

through its Rent and Mortgage Relief Program. While the program is now focused solely on renters, both landlords or tenants can request these funds. The program is jointly administered by the Virginia Department of Housing and Community Development and Virginia Housing.

⁴⁹ US Census Bureau. Household Pulse Survey Week 26. Housing Table 2b.

Food Security

When the pandemic hit full force in the communities served by People Inc. in March 2020, many families were hit with a reduction in income and reduced access to food at the same time. With children at home, some families no longer had easy access to affordable meals for children, and job loss meant that less money was available to meet household needs. Sixteen percent of respondents to our community member survey said they didn't have enough food available because of the pandemic. By July 2020, 8% of Virginia households said they did not have enough to eat in the last week. For families with incomes under \$25,000, it was 20%.⁵⁰

Internet Connectivity

Multiple respondents to the community member survey highlighted the role of internet connectivity, particularly in relation to handling the pandemic. They noted the need for high speed internet access in rural areas to be able to handle virtual learning for children and access telework jobs. Community members and partners also noted that even if internet is available, the cost can be prohibitive. Lack of internet access, for whatever reason, has put families at a great disadvantage when jobs and schooling moved virtual, making it harder to earn and living and ensure children stay on track academically.

⁵⁰ US Census Bureau. Household Pulse Survey Week 10. Food Table 2b.

Appendix 1: Total Population by Locality

Total Population										
	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
Clarke	14,619	14,511	14,454	14,294	14,239	14,315	14,253	14,245	14,190	14,012
Frederick	89,313	88,173	86,456	84,638	83,493	82,714	81,474	80,229	79,512	78,550
Page	23,902	23,972	23,784	23,619	23,662	23,784	23,723	23,841	23,957	24,065
Shenandoah	43,616	43,743	43,276	42,907	42,848	42,729	42,506	42,530	42,266	42,052
Warren	40,164	40,006	39,409	39,165	38,716	40,126	38,500	37,887	37,646	37,518
Northern Shenandoah Valley Total	211,614	210,405	207,379	204,623	202,958	203,668	200,456	198,732	197,571	196,197
People Inc. Total	1,004,119	998,628	991,344	981,104	974,069	967,564	957,991	946,586	932,520	916,347

American Community Survey: Annual Population Estimates. Table PEPANNRES

Appendix 2: Racial and Ethnic Composition by Locality

	% White Alone	% Black Alone	% Native Alone	% Asian Alone	% Pacific Islander Alone	% Other Race Alone	% Two or More Races	% Hispanic or Latino
Clarke	89.8%	5.4%	0.0%	0.7%	0.0%	1.5%	2.6%	5.6%
Frederick	90.7%	3.9%	0.3%	1.4%	0.1%	0.8%	2.8%	8.6%
Page	95.3%	1.4%	0.1%	0.4%	0.0%	0.7%	2.1%	2.0%
Shenandoah	93.4%	1.9%	0.1%	1.0%	0.0%	1.0%	2.6%	7.2%
Warren	89.0%	4.3%	0.2%	1.1%	0.0%	1.9%	3.5%	4.6%
Northern Shenandoah Valley Total	91.4%	3.4%	0.2%	1.1%	0.0%	1.1%	2.8%	6.6%
People Inc. Total	73.1%	12.9%	0.4%	4.8%	0.1%	4.7%	4.1%	15.9%
Virginia	67.6%	19.2%	0.3%	6.4%	0.1%	2.6%	3.8%	9.4%

American Community Survey: 2019 5-year Estimates. Table DP05.

Appendix 3: Age and Sex by Locality

	Sex		Age			
	% Female	% Male	Median Age	Population under 18	Population under 5	Population over 65
Clarke	49.2%	50.8%	47.0	20.7%	4.4%	20.7%
Frederick	50.2%	49.8%	40.7	23.1%	6.0%	16.8%
Page	50.6%	49.4%	45.4	20.3%	4.8%	20.9%
Shenandoah	50.7%	49.3%	44.5	21.2%	5.4%	21.2%
Warren	50.2%	49.8%	41.3	22.1%	5.9%	15.6%
Northern Shenandoah Valley Total	50.3%	49.7%	43.8	22.0%	5.6%	18.2%
People Inc. Total	50.2%	49.8%		242,683	63,902	137,199

American Community Survey: 2019 5-year Estimates. Table DP05.

Appendix 4: Language Spoken at Home

	English Only	Spanish	Other European	Asian Languages	Other Languages
Clarke	93.9%	4.0%	1.1%	0.8%	0.2%
Frederick	90.3%	8.0%	0.9%	0.6%	0.2%
Page	97.7%	1.2%	0.8%	0.3%	0.1%
Shenandoah	92.6%	5.9%	1.0%	0.4%	0.2%
Warren	93.9%	3.5%	1.2%	1.0%	0.4%
Northern Shenandoah Valley Total	92.6%	5.6%	1.0%	0.6%	0.2%
People Inc. Total	78.8%	13.1%	3.6%	2.4%	2.0%
Virginia	83.7%	7.3%	3.6%	3.8%	1.6%

American Community Survey: 2019 5-year Estimates. Table S1601.

Appendix 5: Annual Unemployment Rates by Locality

Annual Unemployment Rate											
	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
Clarke	2.5	2.9	3.4	3.6	4.0	4.4	4.7	5.2	5.7	6.7	6.3
Frederick	2.4	2.6	3.2	3.5	4.0	4.7	5.3	5.8	6.5	7.5	7.5
Page	3.8	4.2	5.1	5.6	6.9	8.1	9.2	10.2	11.1	11.6	11.8
Shenandoah	2.5	2.8	3.4	3.8	4.3	5.0	5.6	6.4	7.1	8.2	8.2
Warren	2.8	3.1	3.7	4.1	4.8	5.6	6.1	6.7	7.4	8.1	7.5
Northern Shenandoah Valley Total	2.7	2.9	3.5	3.9	4.5	5.4	6.0	6.6	7.4	8.2	8.1
Virginia	2.8	3	3.7	4.1	4.5	5.2	5.7	6.1	6.6	7.1	6.7

Local Area Unemployment Statistics. Annual Averages.

Appendix 6: Living Wage by Family Type and Locality

MIT Living Wage												
	1 Adult	1 Adult, 1 Child	1 Adult, 2 Children	1 Adult, 3 Children	2 Adults (1 working)	2 Adults (1 working), 1 Child	2 Adults (1 working), 2 Children	2 Adults (1 working), 3 Children	2 Adults	2 Adults, 1 Child	2 Adults, 2 Children	2 Adults, 3 Children
Clarke	\$16.84	\$31.03	\$35.65	\$43.82	\$23.80	\$28.76	\$31.23	\$36.08	\$11.90	\$16.83	\$19.12	\$22.60
Frederick	\$12.27	\$26.38	\$31.00	\$38.13	\$19.00	\$24.11	\$26.58	\$30.38	\$9.50	\$14.50	\$16.80	\$19.75
Page	\$10.75	\$24.86	\$29.48	\$36.02	\$18.20	\$22.58	\$25.06	\$28.28	\$9.10	\$13.74	\$16.03	\$18.70
Shenandoah	\$11.02	\$25.50	\$30.12	\$37.18	\$18.34	\$23.23	\$25.70	\$29.44	\$9.17	\$14.06	\$16.35	\$19.28
Warren	\$12.21	\$26.66	\$31.28	\$38.99	\$19.21	\$24.38	\$26.86	\$31.25	\$9.61	\$14.64	\$16.93	\$20.18
Northern Shenandoah Valley Total	\$12.62	\$26.89	\$31.51	\$38.83	\$19.71	\$24.61	\$27.09	\$31.09	\$9.86	\$14.75	\$17.05	\$20.10
Virginia	\$14.00	\$28.04	\$32.66	\$40.12	\$21.01	\$25.76	\$28.23	\$32.38	\$10.51	\$15.33	\$17.62	\$20.75

2020 MIT Living Wage Calculator. Retrieved December 2020

Appendix 7: Poverty Rates by Characteristic

Proportion of Population below Federal Poverty Line											
	Total Pop.	Children (under 18)	White Alone	Black Alone	Native Alone	Asian Alone	Other Race Alone	Two or More Races	Hispanic or Latino	Female	Male
Clarke	7.6%	10.5%	6.4%	8.0%	0.0%	32.7%	35.8%	24.9%	9.9%	9.5%	5.8%
Frederick	6.2%	7.7%	6.2%	9.1%	0.0%	4.4%	10.2%	2.3%	15.0%	6.8%	5.5%
Page	15.1%	22.7%	15.3%	7.1%	0.0%	36.9%	27.6%	0.0%	15.3%	16.2%	14.0%
Shenandoah	11.5%	15.8%	11.0%	26.3%	26.3%	31.8%	33.9%	4.4%	22.8%	13.9%	9.1%
Warren	9.9%	15.5%	9.3%	15.2%	45.1%	23.0%	23.1%	7.1%	13.4%	10.5%	9.4%
Northern Shenandoah Valley Total	9.1%	12.6%	8.9%	12.2%	36.7%	16.0%	22.6%	5.1%	16.2%	10.3%	8.0%
People Inc. Total	8.8%	11.7%	8.8%	8.2%	7.2%	6.3%	18.3%	8.8%	12.8%	9.9%	8.3%
Virginia	10.6%	13.9%	8.5%	17.6%	13.0%	7.3%	16.5%	12.7%	14.0%	11.6%	9.5%

American Community Survey. 2019 5-Year Estimates. Table S1701.

Appendix 8: Average Weekly Wage by Locality

	Average Weekly Wage Across All Industries
Clarke	\$846
Frederick	\$916
Page	\$651
Shenandoah	\$746
Warren	\$785
Northern Shenandoah Valley Total	\$832
People Inc. Total	\$923
Virginia	\$1,158

Quarterly Census of Employment and Wages. Annual Averages. 2019

Appendix 9: ALICE Status

	# of ALICE Households	% of households ALICE	# of household in Poverty	% in poverty	# struggling (ALICE + Poverty)	% struggling
Clarke	1,732	30.7%	585	10.4%	2,317	41.1%
Frederick	9,211	29.7%	1,963	6.3%	11,174	36.1%
Page	3,083	33.0%	1,439	15.4%	4,522	48.4%
Shenandoah	4,802	27.7%	2,005	11.6%	6,807	39.3%
Warren	3,415	23.7%	1,351	9.4%	4,766	33.1%
Northern Shenandoah Valley Total	22,243	28.6%	7,343	9.5%	29,586	38.1%
People Inc. Total	99,493	29.4%	30,852	9.1%	130,345	38.5%
Virginia	934,929	29.5%	326,680	10.3%	1,261,609	39.8%

2018 Data – UnitedforALICE.org

Appendix 10: Median Household Income by Housing Status

	All Households	Renter Households	Owner Households
Clarke	\$80,026	\$41,888	\$100,826
Frederick	\$78,002	\$53,232	\$85,599
Page	\$51,792	\$32,627	\$58,765
Shenandoah	\$57,252	\$36,444	\$66,501
Warren	\$69,116	\$42,434	\$81,966
Virginia	\$74,222	\$48,085	\$91,110

US Census Bureau. American Community Survey. 2019 5-Year Estimates Table B25119

Appendix 11: Labor Force Participation Rate by Locality

Annual Labor Force Participation Rate										
	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
Clarke	64%	63%	62%	63%	63%	65%	66%	67%	66%	67%
Frederick	65%	66%	67%	68%	68%	67%	67%	68%	69%	68%
Page	60%	59%	59%	59%	58%	58%	59%	60%	61%	61%
Shenandoah	61%	62%	62%	61%	62%	61%	62%	62%	62%	63%
Warren	65%	64%	64%	64%	66%	67%	68%	68%	70%	70%
Northern Shenandoah Valley Total	63%	64%	64%	64%	64%	64%	65%	66%	66%	66%
People Inc. Total	66%	67%	67%	67%	67%	68%	68%	68%	69%	69%
Virginia	66%	66%	66%	66%	66%	66%	67%	67%	67%	67%

Appendix 12: New Hires by Industry – 1st Quarter 2020

	Ag, Forest, Fishing, Hunting	Minin g Quarry Oil, Gas	Util.	Constr .	Manu - factur e	Whol e-sale	Retail	Trans p. Warehous e	Info.	Financ e and Insur.	Real Estat e and Rent al	Prof. Scient. and Tech.	Man. of Companie s	Admi n. and Wast e Man.	Educ ation	Healt h and Socia l Assis t.	Arts Ent. and Rec .	Accom . and Food Servic e	Other	Public Admin.
Clarke	25	0	0	44	59	16	46	2	0	5	0	38	0	27	34	43	0	62	9	23
Frederick	15	0	10	272	428	107	457	558	37	114	29	117	114	510	72	237	47	570	89	26
Page	0	0	0	19	75	5	89	4	0	39	0	47	0	67	26	85	24	77	16	32
Shenandoa h	10	0	5	78	457	29	244	82	36	11	11	42	8	51	57	191	43	263	33	30
Warren	0	0	3	155	134	11	214	199	9	23	6	19	45	117	63	163	28	244	53	39
Northern Shenandoa h Valley Total	50	0	18	568	1,153	168	1,050	845	82	192	46	263	167	772	252	719	142	1,216	200	150

US Census Bureau, Local Employment Dynamics Program, 1st Quarter 2020. Retrieved from Virginia Works Community Profiles

Appendix 13: Children Under 6 with All Parents in Labor Force

	# of children in two parent HHs with both parents in labor force	# children in single father HH with parent in labor force	# children in single mother HH with parent in labor force	% of children under 6 with all parents in labor force
Clarke	258	5	119	50.3%
Frederick	2,548	414	855	63.4%
Page	582	83	402	75.9%
Shenandoah	1,196	253	397	71.2%
Warren	988	377	395	62.6%
Northern Shenandoah Valley Total	5,572	1,132	2,168	65.3%
People Inc. Total	32,337	4,597	12,046	66.2%
Virginia	8,972,444	1,671,406	4,361,754	67.5%

US Census Bureau. American Community Survey 2019 5-Year Estimates. Table 23008.

Appendix 14: Childcare Characteristics by County

Childcare Providers Registered with Virginia Department of Social Services										
	Licensed		Full Time		Religious Exempt		Serve Infants	Accept Subsidies	Total Child Day Care	
	<i>Providers</i>	<i>Slots</i>	<i>Providers</i>	<i>Slots</i>	<i>Providers</i>	<i>Slots</i>	<i>Providers</i>	<i>Providers</i>	<i>Providers</i>	<i>Slots</i>
Clarke	6	444	8	338	2	90	5	1	9	538
Frederick	14	1,074	22	2,139	10	1,137	15	3	25	2,226
Page	4	137	6	239	4	150	2	2	8	287
Shenandoah	14	458	21	1,038	11	683	11	9	26	1,145
Warren	8	649	11	895	4	296	5	6	12	945
Northern Shenandoah Valley Total	46	2,762	68	4,949	31	2,356	38	21	80	5,141

Virginia Department of Social Services. Child Day Care Search. Accessed January 2021.

Appendix 15: Public Pre-Kindergarten Enrollment

	# of children in pre-K at public schools*	# of 4 year-olds enrolled in the Virginia Preschool Initiative
Clarke	28	5
Frederick	130	54
Page	101	60
Shenandoah	168	136
Warren	161	91
Northern Shenandoah Valley Total	588	346
People Inc. Total	3,039	1,614
Virginia	27,986	18,459

*Virginia Department of Education. 2020-2021 Fall Membership Report

**Kids Count Data Center. 2019-2020 VPI 4-year-old enrollment

Appendix 16: Transportation to Work

	Means of Transportation to Work											
	Drove Alone		Carpooled		Public Transit		Walked		Worked from home		Other	
	#	%	#	%	#	%	#	%	#	%	#	%
Clarke	5,670	80.1%	729	10.3%	37	0.5%	108	1.5%	478	6.7%	60	0.8%
Frederick	35,717	84.1%	3,970	9.3%	87	0.2%	413	1.0%	2,033	4.8%	255	0.6%
Page	8,383	78.1%	1,552	14.5%	30	0.3%	190	1.8%	517	4.8%	59	0.5%
Shenandoah	16,628	82.3%	2,193	10.9%	50	0.2%	285	1.4%	945	4.7%	93	0.5%
Warren	14,316	75.1%	2,846	14.9%	32	0.2%	408	2.1%	1,311	6.9%	152	0.5%
Northern Shenandoah Valley Total	80,714	81.1%	11,290	11.3%	236	0.2%	1,404	1.4%	5,284	5.3%	619	0.8%
People Inc. Total	375,966	78.1%	53,312	11.1%	14,246	3.0%	6,317	1.3%	23,876	5.0%	7,854	1.6%
Virginia	3,230,271	77.0%	384,172	9.2%	184,534	4.4%	102,121	2.4%	221,092	5.3%	75,372	1.8%

*US Census Bureau. 2019 5-Year Estimates. Table DP03

Appendix 17: Vacancy Rates by Locality

Annual Vacancy Rate										
	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
Clarke	11.6%	10.7%	11.4%	11.0%	11.7%	10.2%	10.7%	10.4%	10.5%	10.5%
Frederick	7.8%	7.8%	7.8%	8.0%	8.4%	8.4%	7.6%	7.0%	7.7%	6.3%
Page	21.0%	20.3%	19.1%	18.2%	19.5%	18.0%	17.0%	18.2%	17.4%	16.3%
Shenandoah	18.0%	18.2%	18.3%	18.2%	18.7%	17.8%	16.8%	17.1%	17.2%	15.2%
Warren	10.6%	11.7%	12.3%	12.2%	10.8%	10.7%	10.1%	10.1%	10.7%	10.1%
Northern Shenandoah Valley Total	12.7%	12.8%	12.9%	12.8%	13.0%	12.5%	11.8%	11.8%	12.1%	10.8%
People Inc. Total	9.9%	9.8%	9.5%	9.2%	9.1%	9.2%	9.2%	9.7%	10.0%	9.9%
Virginia	10.3%	10.4%	10.4%	10.3%	10.5%	10.6%	10.6%	10.7%	10.6%	10.3%

American Community Survey: 2019 5-Year Estimates Table DP04

Appendix 18: Age of Housing Stock by Ownership Status

% of Total Housing Units by Year Constructed and Ownership Status												
	1939 or Earlier			1940-1979			1980-1999			2000 or Later		
	All HH	Renter	Owner	All HH	Renter	Owner	All HH	Renter	Owner	All HH	Renter	Owner
Clarke	18.4%	21.6%	17.3%	34.4%	40.6%	32.3%	27.3%	27.9%	27.0%	20.0%	9.9%	23.3%
Frederick	5.2%	7.6%	4.5%	26.1%	30.0%	25.0%	37.0%	38.9%	36.5%	31.7%	23.5%	34.0%
Page	17.9%	23.5%	15.7%	44.0%	42.6%	44.6%	24.9%	24.1%	25.2%	13.1%	9.8%	14.5%
Shenandoah	18.7%	19.8%	18.2%	33.2%	40.3%	30.2%	26.7%	26.9%	26.6%	21.5%	13.0%	25.0%
Warren	9.5%	17.0%	7.2%	37.3%	49.0%	33.7%	33.0%	26.7%	34.8%	20.2%	7.2%	24.2%
Northern Shenandoah Valley Total	11.4%	15.6%	10.1%	32.5%	38.5%	30.5%	31.8%	30.9%	32.2%	24.2%	15.1%	27.3%
People Inc. Total	5.8%	7.6%	5.2%	30.7%	34.3%	29.5%	35.0%	36.3%	34.5%	28.0%	21.8%	30.2%
Virginia	6.7%	7.5%	6.1%	39.1%	41.6%	37.2%	32.8%	31.6%	33.0%	21.4%	19.3%	23.8%

*US Census Bureau. 2019 5-Year Estimates. Table S2504

Appendix 19: Housing Cost Burden by Ownership Status

	Households Paying 30% or More of Household Income on Housing Costs					
	All Households		Renter Households		Owner Households	
	# burdened	% burdened	# burdened	% burdened	# burdened	% burdened
Clarke	1,597	29.6%	708	59.3%	889	21.2%
Frederick	6,915	22.5%	2,509	39.3%	4,406	18.1%
Page	2,384	27.5%	1,025	48.3%	1,359	20.7%
Shenandoah	5,039	29.5%	2,249	47.4%	2,790	22.6%
Warren	3,652	25.8%	1,399	45.2%	2,253	20.4%
Northern Shenandoah Valley Total	19,587	25.8%	7,890	45.0%	11,697	20.0%
People Inc. Total	94,596	28.9%	39,225	48.7%	55,371	22.4%
Virginia	916,399	29.9%	473,294	47.8%	443,105	21.4%

*US Census Bureau. 2019 5-Year Estimates. Table DP04

Appendix 20: Insurance Coverage

	Individuals <u>Not</u> Covered by Health Insurance							
	All Individuals		Children (<18)		Income below \$25,000		Income at or above \$25,000	
	# of individuals	% of individuals	# of individuals	% of individuals	# of individuals	% of individuals	# of individuals	% of individuals
Clarke	1,805	12.7%	358	11.6%	294	27.3%	1,501	11.4%
Frederick	7,235	8.5%	991	4.7%	870	15.1%	6,323	8.0%
Page	2,868	12.2%	345	6.8%	729	19.2%	2,134	10.8%
Shenandoah	3,512	8.2%	404	4.2%	980	16.4%	2,498	6.8%
Warren	4,120	10.5%	601	6.4%	469	12.5%	3,570	10.2%
Northern Shenandoah Valley Total	19,540	9.5%	2,699	5.6%	3,342	16.4%	16,026	8.7%
People Inc. Total	103,507	10.6%	16,758	6.6%	15,480	17.8%	87,623	9.9%
Virginia	707,960	8.6%	99,819	5.0%	137,819	15.2%	560,350	7.8%

*US Census Bureau. 2019 5-Year Estimates. Table S2701

Appendix 21: Healthcare Providers and Capacity

	Mental Health Providers		Primary Care Providers		Dental Providers	
	Total # of Providers	Residents per Provider	Total # of Providers	Residents per Provider	Total # of Providers	Residents per Provider
Clarke	8	1,820	7	2,070	5	2,900
Frederick	49	1,800	37	2,340	11	8,030
Page	9	2,660	8	2,970	4	5,980
Shenandoah	22	1,980	21	2,060	13	3,350
Warren	36	1,110	21	1,880	11	3,640
Northern Shenandoah Valley Total	124	1,695	94	2,208	44	4,780
Virginia		570		1,320		1,240

County Health Rankings and Roadmaps. NPI Registry.

Appendix 22: Substance Abuse Indicators

	Drug Overdose Deaths (rate per 100,000)				Neonatal Abstinence Syndrome (rate per 1,000 births)				
	2018	2017	2016	2015	2017	2016	2015	2014	2013
Clarke	6.9	13.8	27.8	20.9	9.1	16.8	7.8	16.3	0
Frederick	18.1	19.7	23.7	26.4	27.4	21.6	14.9	14.2	15
Page	12.5	12.6	21.1	8.4	24.7	29.8	18.3	22.8	21.1
Shenandoah	13.8	23.1	16.2	30.1	13.5	13	20.5	2.3	9.6
Warren	25	37.9	23	33.3	17.5	28	19.3	22.1	12.2
Northern Shenandoah Valley Total	17.1	22.7	22.0	26.0	21.2	21.8	16.8	14.5	14.0
Virginia	15.0	17.4	15.7	12.1	7.4	6.4	5.5	5.0	4.5

Virginia Department of Health, Opioid Indicators Dashboard

Appendix 23: Food and Nutrition Indicators

	Food Insecurity*		SNAP Recipients**	
	# food insecure individuals	% of population food insecure	# of households receiving SNAP	% of households receiving SNAP
Clarke	1,190	8.3%	263	4.7%
Frederick	5,920	7.0%	1,394	4.4%
Page	3,310	13.9%	1,180	12.7%
Shenandoah	4,160	9.7%	1,920	11.0%
Warren	3,600	9.1%	1,341	9.2%
Northern Shenandoah Valley Total	18,180	8.9%	6,098	7.8%
Virginia	842,870	9.90%	259,639	8.2%

*Feeding America. Map the Meal Gap. 2018

**US Census Bureau. American Community Survey 2019 5-Year Estimates Table S2201

Appendix 24: Kindergarten Readiness

	PALS-K Kindergarten Readiness Levels		
	# of children below readiness	% children below readiness	% of children ready
Clarke	19	18.1%	81.9%
Frederick	138	14.7%	85.3%
Page	54	23.6%	76.4%
Shenandoah	87	22.6%	77.4%
Warren	89	22.5%	77.5%
Northern Shenandoah Valley Total	387	18.9%	81.1%
People Inc. Total	2,493	21.3%	78.69%
Virginia	12,289	15.7%	84.30%

*Falls PALS-K. FY2019-2020. Annie E Casey Kids Count Data Center

Appendix 25: Educational Attainment

Proportion of Population 25+ by Highest Level of Education							
	Less than 9 th Grade	9-12 th grade, no diploma	High School graduate or equivalent	Some college	Associates Degree	Bachelors Degree	Graduate or Professional Degree
Clarke	4.8%	6.1%	29.6%	18.0%	9.3%	17.3%	14.8%
Frederick	4.0%	6.8%	32.4%	19.7%	8.9%	16.2%	12.0%
Page	6.6%	10.7%	45.5%	17.9%	5.6%	9.0%	4.7%
Shenandoah	4.9%	8.1%	37.9%	20.3%	8.3%	14.0%	6.6%
Warren	3.3%	9.8%	35.9%	22.1%	7.2%	15.1%	6.7%
Northern Shenandoah Valley Total	4.4%	8.0%	35.6%	19.9%	8.1%	14.7%	9.2%
People Inc. Total	5.8%	7.2%	27.1%	19.7%	8.2%	19.4%	12.6%
Virginia	4.1%	6.2%	24.0%	19.2%	7.8%	22.0%	16.8%

US Census Bureau. American Community Survey. 2019 5-Year Estimates. Table S1501.

Appendix 26: High School Completion Rates

Four-Year Completion Rates by Student Characteristics					
	All Students	Economically Disadvantaged	Disability	Male	Female
Clarke	97.0%	92.7%	88.2%	93.8%	100.0%
Frederick	86.1%	80.0%	88.1%	88.1%	84.1%
Page	99.2%	99.4%	100.0%	98.6%	100.0%
Shenandoah	98.1%	97.1%	96.4%	97.2%	98.9%
Warren	97.9%	97.1%	100.0%	98.1%	97.7%
Northern Shenandoah Valley Total	96.0%	93.8%	95.6%	95.8%	96.3%
Virginia	93.4%	88.7%	90.9%	91.8%	95.0%

Virginia Department of Education – Class of 2020 Four-Year Cohort Report

Appendix 27: Daily New COVID-19 Cases

Average Daily New COVID-19 Cases by Month and Locality												
	March 2020	April 2020	May 2020	June 2020	July 2020	Aug. 2020	Sept. 2020	Oct. 2020	Nov. 2020	Dec. 2020	Jan. 2021	Feb. 2021
Clarke	0.1	0.2	0.6	0.7	0.7	0.4	0.5	0.9	2.9	5.8	9.2	3.0
Frederick	0.9	3.1	7.9	4.8	5.1	3.7	4.5	9.9	34.0	48.5	73.2	26.8
Page	0.1	3.3	3.9	1.6	2.0	1.0	1.4	2.7	3.5	13.9	20.3	6.1
Shenandoah	0.5	3.4	11.0	3.8	3.4	3.3	1.3	6.1	13.6	25.8	38.8	10.6
Warren	0.2	1.6	3.4	4.2	2.1	1.4	1.6	5.8	8.0	15.2	21.6	10.5
Northern Shenandoah Valley Total	1.7	11.6	26.7	15.2	13.2	9.7	9.3	25.4	62.0	109.2	163.1	57.0

Virginia Department of Health

Appendix 28: COVID-19 Risk Factor Prevalence

	Adult Smokers*		Adult Obesity**		Population over 65***	
	%	#	%	#	%	#
Clarke	15%	1,716	26%	2,975	21%	2,990
Frederick	14%	9,306	31%	20,607	17%	14,514
Page	18%	3,413	36%	6,826	21%	4,966
Shenandoah	16%	5,447	33%	11,235	21%	9,158
Warren	16%	4,920	32%	9,840	16%	6,170
Northern Shenandoah Valley Total	15.3%	24,803	31.8%	51,482	18%	37,798
People Inc. Total	15%	110,104	31%	231,990	14%	137,199
Virginia	16%	1,054,202	30%	1,976,629	16%	1,271,946

*County Health Rankings and Roadmaps. Retrieved January 2021.

**CDC Diabetes Atlas. 2016. County Health Rankins and Roadmaps

***US Census Bureau. American Community Survey 2019 5-Year Estimates. Table S0101

Appendix 29: Monthly Unemployment Rate – COVID-19 Time Period

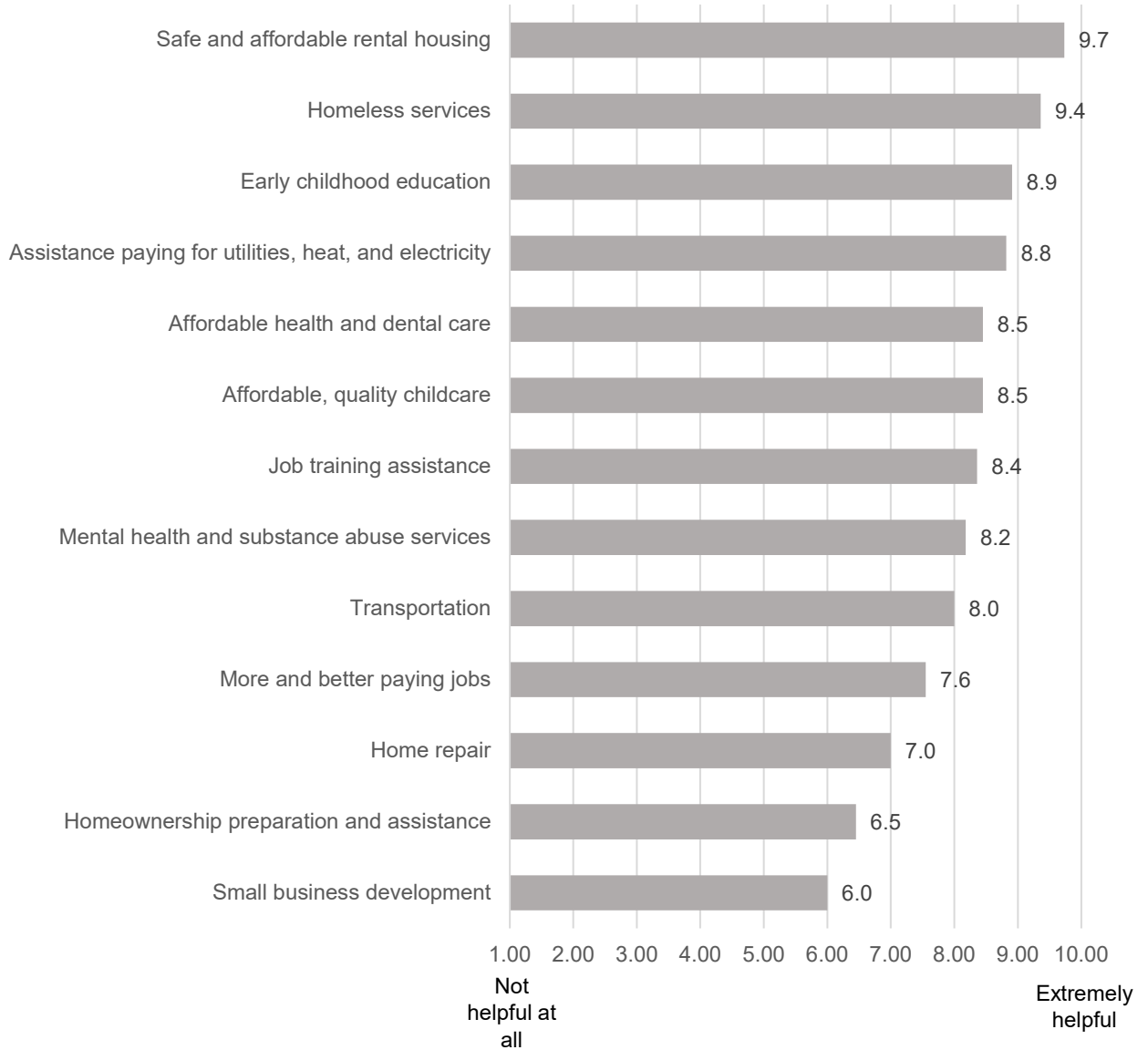
Monthly Unemployment Rate											
	March 2020	April 2020	May 2020	June 2020	July 2020	Aug. 2020	Sept. 2020	Oct. 2020	Nov. 2020	Dec. 2020	Jan. 2021
Clarke	2.8%	8.1%	6.8%	6.8%	5.6%	4.2%	4.2%	3.3%	3.2%	3.5%	4.1%
Frederic	2.8%	9.5%	7.4%	6.5%	5.7%	4.4%	4.3%	3.4%	3.2%	3.4%	4.1%
Page	5.9%	14.1%	11.2%	9.0%	7.5%	5.8%	5.5%	4.4%	4.2%	5.6%	7.6%
Shenandoah	3.1%	9.7%	7.8%	6.9%	6.2%	4.9%	4.8%	3.8%	3.6%	3.9%	5.2%
Warren	3.3%	11.0%	8.7%	7.6%	7.0%	5.6%	5.3%	4.2%	4.0%	4.3%	5.3%
Northern Shenandoah Valley Total	3.3%	10.3%	8.1%	7.0%	6.3%	4.9%	4.7%	3.7%	3.5%	3.9%	4.9%
Virginia	3.3%	10.8%	8.9%	8.2%	8.0%	6.3%	6.1%	5.1%	4.5%	4.7%	5.7%

Virginia Works. Local Area Unemployment Statistics.

Appendix 30: Staff Survey Summary

All People Incorporated staff were given the opportunity to provide input on community needs through a short, electronic survey in October 2020. Twelve staff working in the Northern Shenandoah Valley responded. Staff were asked to rank specific needs, and were also given the opportunity to describe what they saw as the greatest need in the communities they served.

*How helpful are the following services for the communities you work in?
(average score)*



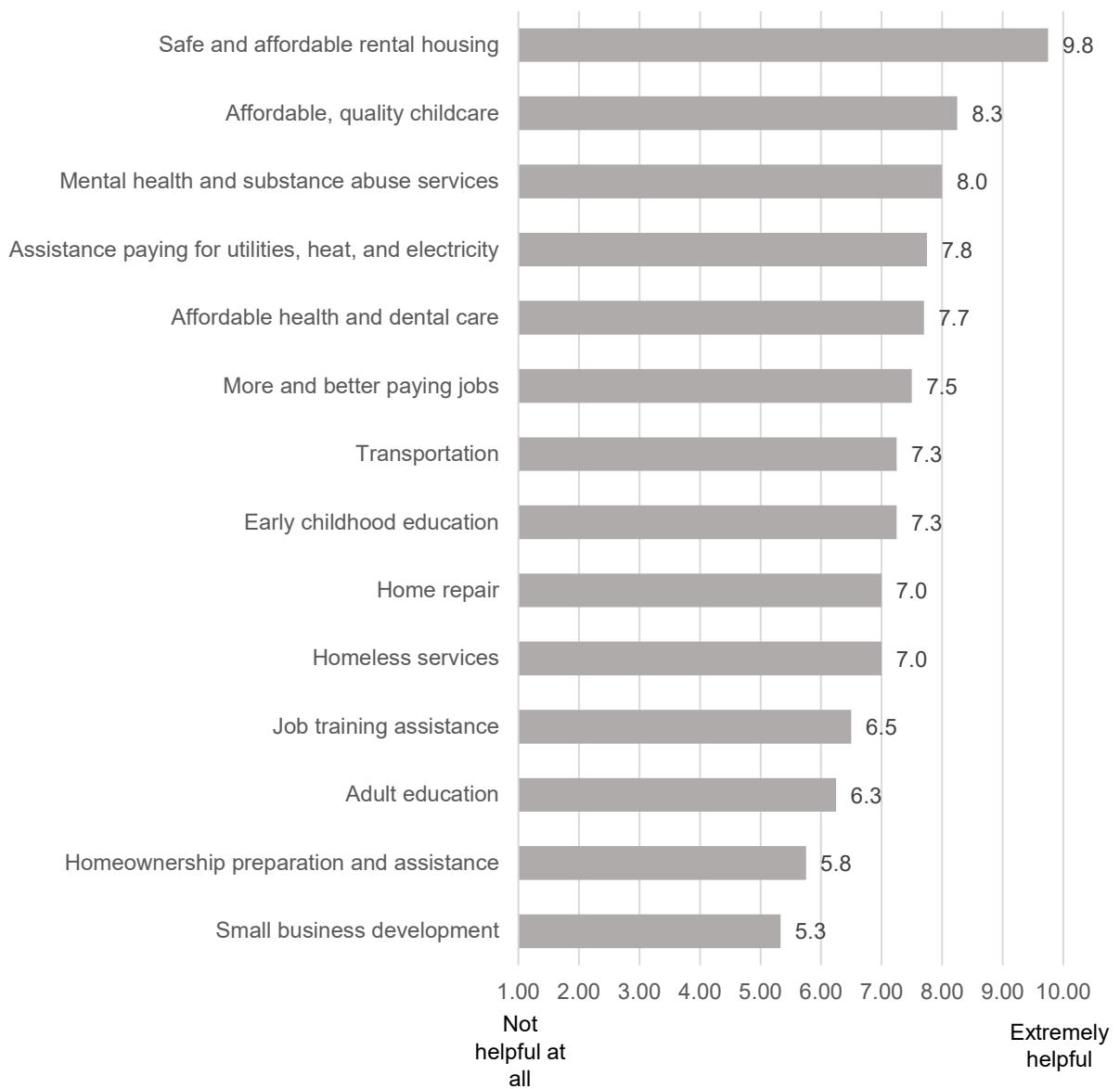
What is the single greatest need facing your community?

1. Housing
 - Affordable rental housing
2. Mental Health and Substance Abuse
 - Lack of providers
 - Need of mental health supports for children and families
3. Childcare
 - Availability of childcare
4. COVID
 - Extra resources during pandemic
 - Pandemic impacted unemployment
5. Other
 - Poverty
 - Agencies working together

Appendix 31: Board Survey Summary

All People Incorporated board members were given the opportunity to provide input on community needs through a short, electronic survey in October 2020. Four board members representing the Northern Shenandoah Valley responded. Board members were asked to rank specific needs, and were also given the opportunity to describe what they saw as the greatest need in the communities they represented.

*How helpful are the following services for the communities you work in?
(average score)*



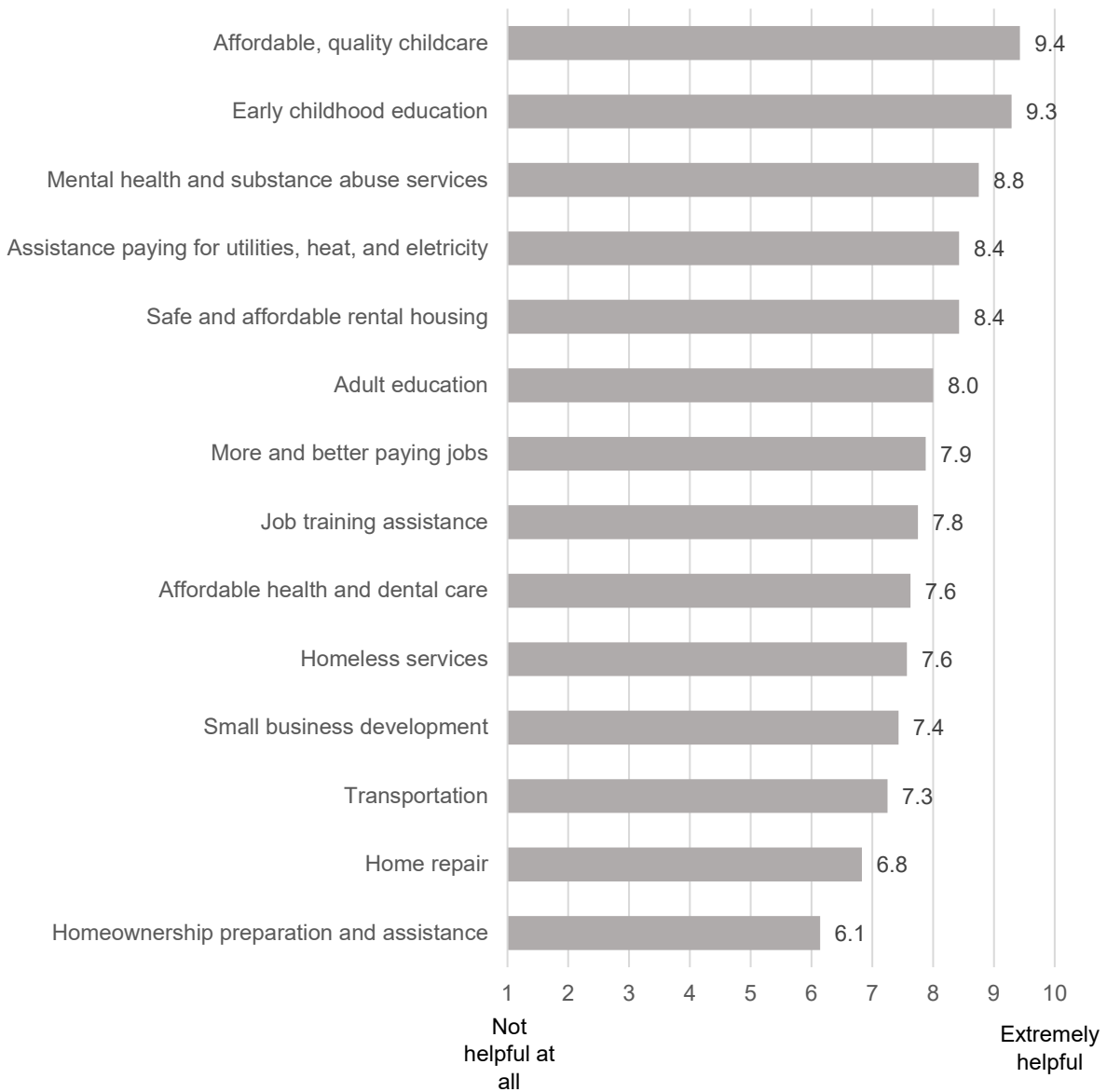
What is the single greatest need facing your community?

1. Affordable Housing
2. Substance Abuse

Appendix 32: Partner Survey Summary

All People Incorporated maintains a list of partner organizations from across the communities served by the agency. All partners were given the opportunity to provide input on community needs through a short, electronic survey in November 2020. Eight partners from the Northern Shenandoah Valley responded. Partners were asked to rank specific needs, and were also given the opportunity to describe what they saw as the greatest need in the communities they served.

*How helpful are the following services for the communities you work in?
(average score)*



What is the single greatest need facing your community?

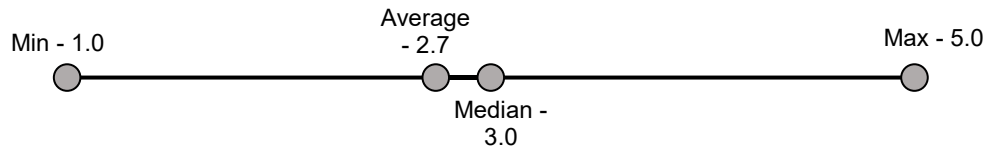
1. Affordable Housing
2. Mental health/Substance abuse
3. Jobs

Appendix 33: Community Member Survey Summary

The primary group for the needs assessment is community members, particularly those that are low-income. People Incorporated used multiple methods to solicit input from individuals living in all communities served. An electronic version of the survey was emailed directly to all individuals in People Incorporated’s client database, empowOR, who had a valid email address. The survey was also distributed through an electronic link on People Inc.’s social media channels and through partners. Valid responses were received from 31 Northern Shenandoah Valley community members.

Respondent Demographics

- How many people live in your household?



- What is your current annual income for your entire household?

Less than \$20k 26.6%	\$20k-\$40k 30.0%	\$40k-\$60k 16.7%	Over \$60k 26.7%
---------------------------------	-----------------------------	-----------------------------	----------------------------

- Is anyone in your household a veteran or active duty military?

Yes 20.0%	No 80.0%
---------------------	--------------------

- What language do you speak at home?

English 96.8%	Spanish 3%
-------------------------	----------------------

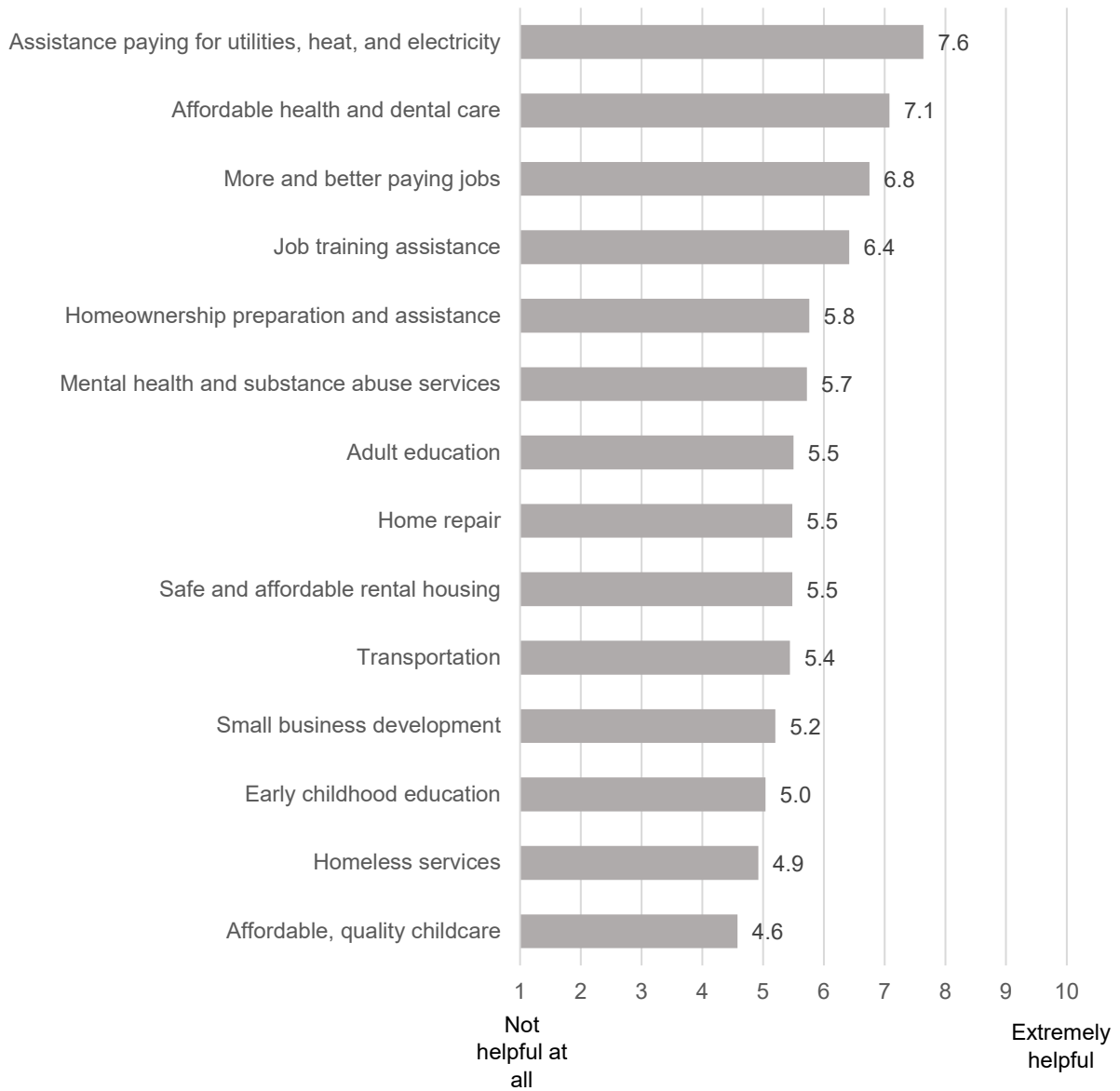
- What is your highest level of education?

Less than HS 6.5%	High School Diploma or GED 58.1%	Associate or Technical Cert 16.2%	Bachelor's or Higher 19.4%
-----------------------------	--	---	--------------------------------------

Top Needs

- How helpful might the following services be to you or your family?

*How helpful are the following services for the communities you work in?
(average score)*



What is the single greatest need facing your family?

1. Lack of income to support cost of living
 - Lack of financial freedom
 - No income left over after paying housing, utilities, etc.
 - Higher paying jobs/ability to earn more income
2. Housing Support
 - Safe and affordable housing
 - Rental and utility assistance
 - Lack of affordable, quality housing
3. Food
 - Being able to afford food
 - Food Access

What is the single greatest need facing your community?

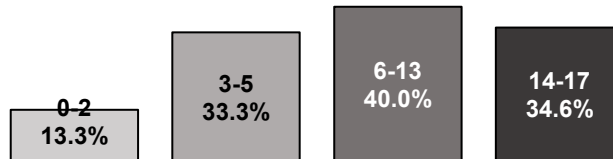
1. Employment and Jobs
 - Higher paying jobs
 - More employment opportunities
2. Housing
 - Safe and Affordable Housing
 - Rent/utility assistance
3. Pandemic Recovery
 - Recovery from pandemic economy
4. Health
 - Mental Health and substance abuse services
 - Affordable food access

Children

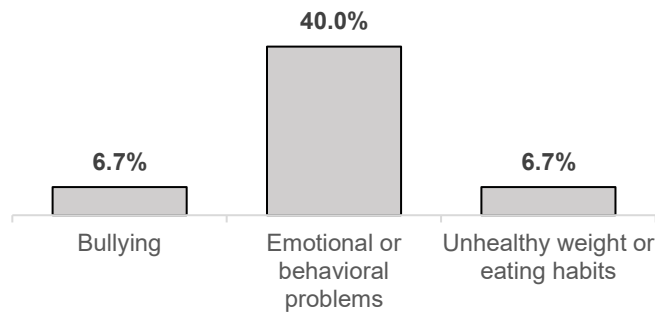
- Do any children under 18 live in your household?



- In which of the following age groups do the children in your household fall?



- Have you experienced any of the following issues with children in your household over the last 12 months?



Food Security

- In the last 12 months, have you or anyone in your household gone hungry because you were not able to get enough food?



- In the last 12 months, have you or anyone in your family used any of these food assistance programs to help with food costs?

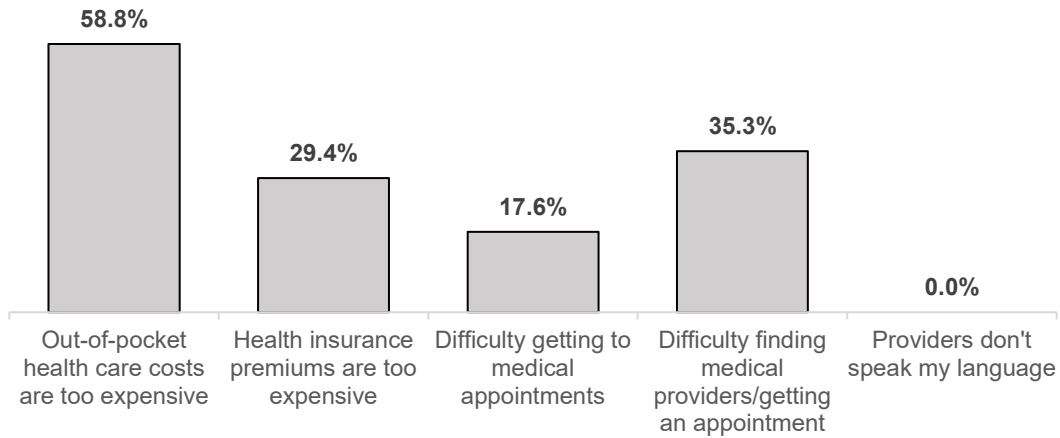


Healthcare

- Are you and your family members currently covered by health insurance?

All 88.0%	Some 12.0%
----------------------	-----------------------

- Do you face any of the following issues when accessing healthcare?



Assets

- Do you have reliable transportation?

Yes 88.0%	No 12.0%
----------------------	---------------------

- Do you have a bank account?

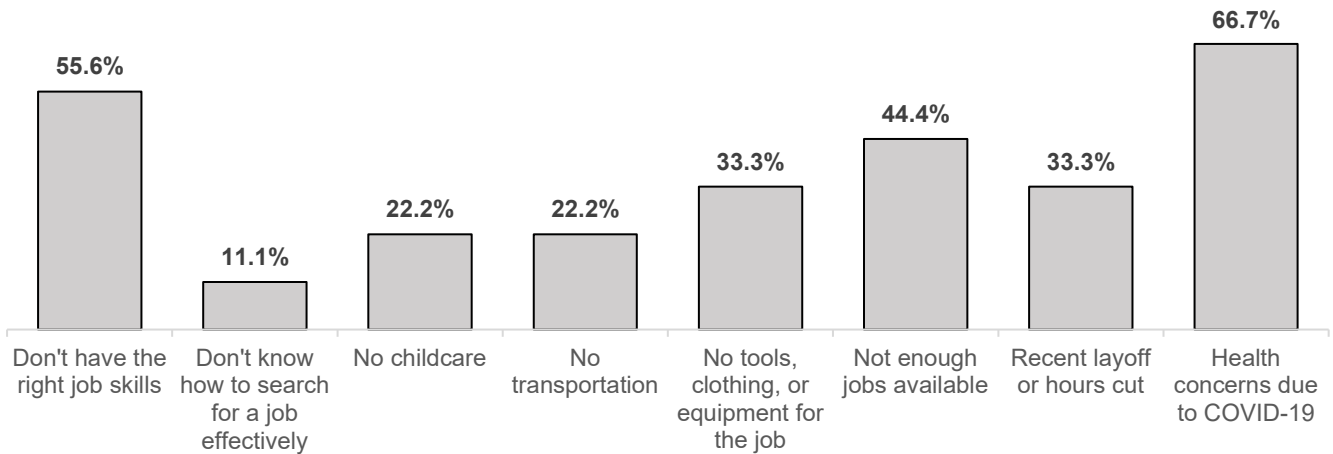
Yes 96.0%	No 4.0%
----------------------	--------------------

Employment

- Has getting or keeping a job been a problem for you or anyone in your household in the last 12 months?



- Have any of the issues below been a major concern in getting or keeping a job?

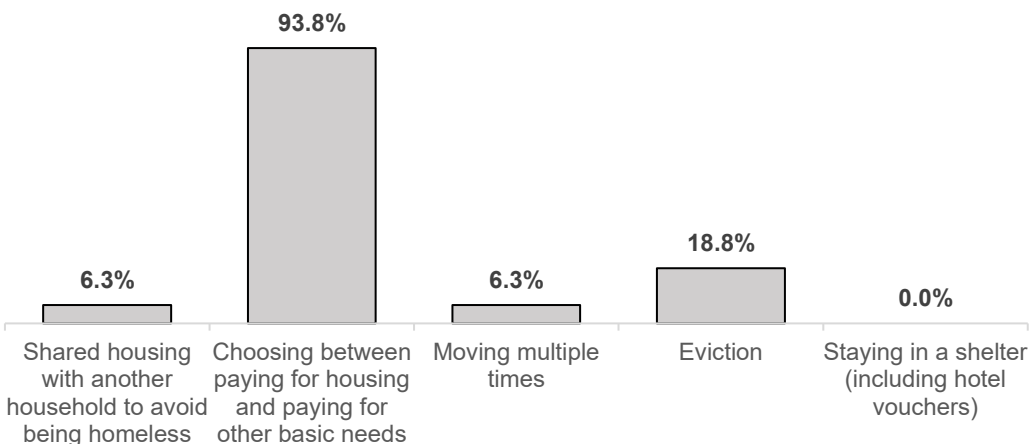


Housing

- What is your current living situation?



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



COVID-19

- Have you or your household members experienced any of the following situations because of COVID-19?

