MOBILITY EXPERIENCES

A RESEARCH SERIES ON PATHWAYS TO ECONOMIC MOBILITY

PART 3

Federal & Philanthropic Funding Trends in Economic Mobility

NOVEMBER 2024

About Mobility Experiences

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Economic mobility, an often-cited measure for economic progress, has been stunted in the United States for decades according to absolute measures.

In the 1940s, 90 percent of all children grew up to be better off financially than their parents. By the 1980s, less than 50 percent could say the same.[1]

Declining economic mobility is a reflection of the mounting barriers that impede individuals from advancing their income and wealth. The outsized impact of these barriers on specific segments of the population — particularly those divided by class, geography, and racial identity — fuels inequities that further drive the economic disparities we see today. Within the context of these systemic barriers, specific life experiences determine who gains or loses the power to advance economically. These life experiences span from birth through adulthood, with a wide range of magnitude of impact.

The 2024 *Mobility Experiences* research series emerges from research that included a meta-analysis of over 230 peer-reviewed studies exploring the impact of programs and life experiences on incomes, a survey of over 4,000 people across the United States, and analysis of federal and philanthropic funding supporting the Mobility Experiences.

The research is divided into three reports that shed new light on:

1. Life experiences that contribute to advancing economic mobility within one's lifetime (known as Mobility Experiences), measured by lifetime income, and the degree of impact of each life experience;
2. The perceptions of Americans, particularly those earning low and middle incomes, of the importance of each of these life experiences, including comparison of general societal beliefs, lived experiences, and quantitative findings; and
3. The flow of investment of public and philanthropic dollars into these life experiences and the common features of programs that have succeeded in enabling greater economic mobility.

By providing a holistic and nuanced understanding of the experiences that impact economic mobility, and the degree to which these experiences are understood and resourced, this report serves as a tool for:

- Alignment of funders, government and civic leaders, policymakers, service providers, and community groups around a broad, evidence-based, economic mobility agenda;
- Greater, more effective mobilization of investment toward these life experiences; and
- Narrative change efforts targeting prevalent misperceptions of economic mobility's drivers.

For an interactive view of the federal and philanthropic funding analyzed in this report, explore the data dashboard found on the Mobility Experiences website. This data dashboard allows users to sort and filter funding to understand key trends in federal and philanthropic capital invested into the Mobility Experiences.

Acknowledgments

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The findings and conclusions contained within are those of the authors and do not necessarily reflect the positions or policies of the Gates Foundation or other participating organizations.

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Executive Summary

Annually, trillions of dollars from the federal government and philanthropic institutions have the potential to support Americans in accessing the Mobility Experiences. However, funding could be more optimally directed towards the Mobility Experiences proven to have greatest impact on income or prioritized by the most economically excluded.

Even where capital is optimally mobilized and directed, its impact can be constrained by limitations in accessibility or program design. There are near-term opportunities to mobilize more impactful capital as a means of equalizing economic opportunity for all.

We find that over $6 trillion in federal and philanthropic capital flowed to the Mobility Experiences in 2022 and 2023 — the most recent years for which comprehensive data exists.[i] Although funding to the Mobility Experiences as a whole grew by 16 percent (adjusted for inflation) from pre-pandemic levels (2019), there remain opportunities to better align funding to the Mobility Experiences that are most effective at boosting income and meeting the stated needs of Americans, especially for those who are most economically excluded.

This report uncovers how the federal government and philanthropic institutions invest in the Mobility Experiences and identifies areas primed for additional investment.

i Throughout the report, the most recent year of funding reported is 2022 for philanthropic data and fiscal year 2023 for federal data.

Key Takeaways Include:

UNDERSTANDING HOW CAPITAL FLOWS TO THE MOBILITY EXPERIENCES

Federal capital was the source of over $6 trillion in annual investment into the Mobility Experiences in fiscal year 2023. Broadly, federal capital for the Mobility Experiences is:

- **Critically important**: The vast majority of funding into the Mobility Experiences, over 99 percent, was provided by the federal government;
- **Highly concentrated**: 90 percent of federal funding into the Mobility Experiences was clustered into two Mobility Domains — *Financial Well-being* and *Physical & Mental Health*; and
- **Present-oriented**: Federal funding into the Mobility Experiences overwhelmingly supports people in meeting their basic needs, primarily through allocations to programs such as Social Security, Medicare, and Medicaid.

Philanthropic capital was the source of $8.4 billion of funding into the Mobility Experiences in 2022. Though fractional in size relative to federal funding, philanthropic capital flowed to the Mobility Experiences in notably different ways. Comparatively, philanthropic capital is:

- **Responsive**: Flexible and timely in meeting gaps in accessing the Mobility Experiences;
- **Broad**: Dispersed across the Mobility Experiences, compared to federal funding; and
- **Future-oriented**: Focused on driving upward mobility, particularly through funding to the Mobility Experiences within the *Education* domain.

For more detailed information on federal and philanthropic funding to the Mobility Experiences, including top funders, time-based trends, and funding comparisons, visit our interactive data dashboard at mobilityexperiences.org/capital-mapping-dashboard.

IMPROVING HOW CAPITAL FLOWS TO THE MOBILITY EXPERIENCES

Federal capital is, comparatively, channeled more towards Mobility Experiences with weaker impact on lifetime income but is more aligned to the Mobility Experiences prioritized by economically excluded Americans. On the other hand, **institutional philanthropy** is directing a larger share of its funding toward Mobility Experiences with a high proven impact on lifetime income and is more aligned with the priorities of the American public as a whole, rather than specifically those living under 200 percent of the federal poverty level.

There are opportunities for both the federal government and philanthropic institutions to target their funding by investing at the intersection of impact and demand. By analyzing the lifetime income impact of and demand for each Mobility Experience layered on current federal and philanthropic funding levels, we identified a subset of Mobility Experiences with high proven income effects and strong public interest, yet currently receive comparatively lower amounts of funding, including: *graduating with a degree in a high-paying field of study, receiving job/skills training, avoiding involuntary unemployment, obtaining a first full-time job with opportunity for advancement, owning a business, receiving mentorship in adolescence,* and *having strong social and professional networks*.

In addition to increasing funding intended to support access to the Mobility Experiences listed above, federal and philanthropic funders should consider:

- Continuing to fund the experiences falling within the *Physical and Mental Health* Mobility Domain, such as *having low exposure to traumatic experiences* and *accessing care for mental and physical health conditions*, given high public interest in those experiences; and
- Improving the effectiveness of funding to the Mobility Experience *pursuing/completing postsecondary education* by prioritizing college-readiness and affordability of postsecondary education for Americans from low-income households.

MAKING CAPITAL MORE EFFECTIVE

We can improve the efficacy of federal and philanthropic investments by directing funding towards interventions grounded in design elements that have been shown to be most effective. Based on an analysis of over 200 program evaluations, funders and other economic mobility practitioners should consider:

- Channeling funding towards programs that offer **sustained support over time**, including funding for program extensions;
- Using funding to **introduce or expand wrap-around services** or comprehensive support for existing programs; and
- Designing programs that **source and incorporate beneficiary input** throughout the project lifecycle.

Across programs, stakeholders can amplify the impact of interventions by:

- **Reducing silos** to improve coordination and achieve cross-sector impact; and
- **Prioritizing equity** in decision-making to ensure funding and interventions reach Americans poised to benefit most from upward mobility out of poverty.

Substantial portions of federal funding into the Mobility Experiences have the potential to be administered and allocated at the local level. This greatly hinges on local leaders' ability to effectively access this capital. Six capacities appear to influence how effectively localities are able to access and deploy federal funding to improve economic mobility:

1. Local and Regional Governance Capacity
2. Strength of the Financial Sector
3. Presence and Priorities of Major Employers and Institutions
4. Robustness of the Local Service Ecosystem
5. Scale and Focus of Philanthropy
6. Capacity of the Real Estate Development Sector

Funders should consider investing in:

- **Strengthening local government staffing** and funding additional analytical support;
- **Partnering with anchor institutions** to sustain support for initiatives that improve access to the Mobility Experiences;
- **Supporting and attracting financial institutions** and place-focused philanthropies; and
- **Supporting evaluations of local capacities** in cities that are struggling to access federal funding.

Future research should focus on identifying adequate funding levels to meet the needs of Americans in accessing all 28 Mobility Experiences, while also exploring how private sector funding can play a role in access. In the coming years, monitoring funding trends to the Mobility Experiences will also be critical for identifying areas of success and opportunities for continued growth, as will articulating the optimal combinations of policies, programs, and governance approaches that allow some localities to outperform their peers in providing access to the Mobility Experiences.

Acronyms

ACE Adverse childhood experience

BEA Budget Enforcement Act

CDFI Community development financial institution

CHIPS **(and Science Act)** Creating Helpful Incentives to Produce Semiconductors

FPL Federal poverty level

FY Fiscal year

IRS Internal Revenue Service

OMB Office of Management and Budget

PCS Philanthropy Classification System

SBA Small Business Administration

SNAP Supplemental Nutrition Assistance Program

STEM Science, technology, engineering, and math

TANF Temporary Assistance for Needy Families

USDA United States Department of Agriculture

WIC Special Supplemental Nutrition Program for Women, Infants, and Children

Table of Contents

1 Introduction: Advancing upward mobility requires sufficient funding of the Mobility Experiences

Having the power to achieve upward economic mobility[i] is a founding tenet of the United States — the belief that all people, through their own pursuits, should have the opportunity to live prosperous lives and progress their standard of living relative to prior generations.

However, the trend over several decades is a decline in economic mobility (under an absolute, inter-generational measure) and an increasing concentration of wealth within the highest income brackets, while millions of Americans continue to struggle with economic insecurity. These trends underscore the pressing need to mobilize greater, and more effective, funding and align on the most promising approaches to increase economic mobility in the United States.

The first two reports in the Mobility Experiences research series explore the 28 life experiences found to drive economic mobility through higher lifetime income (the ***Mobility Experiences***) and Americans' perspectives on which of these matter most (**Exhibit 1.1**).

i Economic mobility refers to the ability of an individual, family, or societal group to change their economic standing, often measured by changes in income or wealth, as well as their power and autonomy, and being valued in their community. Mobility can be upward or downward and can be intergenerational — earning more or less than one's parents — or intragenerational — changing one's economic standing during one's lifetime.

In this report, we examine how the Mobility Experiences are currently funded by the federal government and philanthropic institutions to uncover areas that are optimal for further investment to support Americans in accessing higher incomes throughout their lifetimes.

We share insights from our analysis on the flow and distribution of economic mobility-related investments across the 28 Mobility Experiences for two years (2019 and 2022/23), drawing on a philanthropic dataset of nearly 100,000 grants from the largest 1,000 philanthropic institutions in the United States and federal budget data representing nearly $15.6 trillion. This research attempts to map all federal and philanthropic capital that affects access to the Mobility Experiences, regardless of whether the funding is explicitly intended to advance economic mobility. For example, funding for the Indian Health Service, which has a mandate to provide healthcare rather than advance economic mobility, is included in the analysis because access to healthcare is an important driver of lifetime income. This inclusive approach more comprehensively uncovers how funding is currently deployed and serves to highlight the true breadth of programs and investments that support economic mobility.

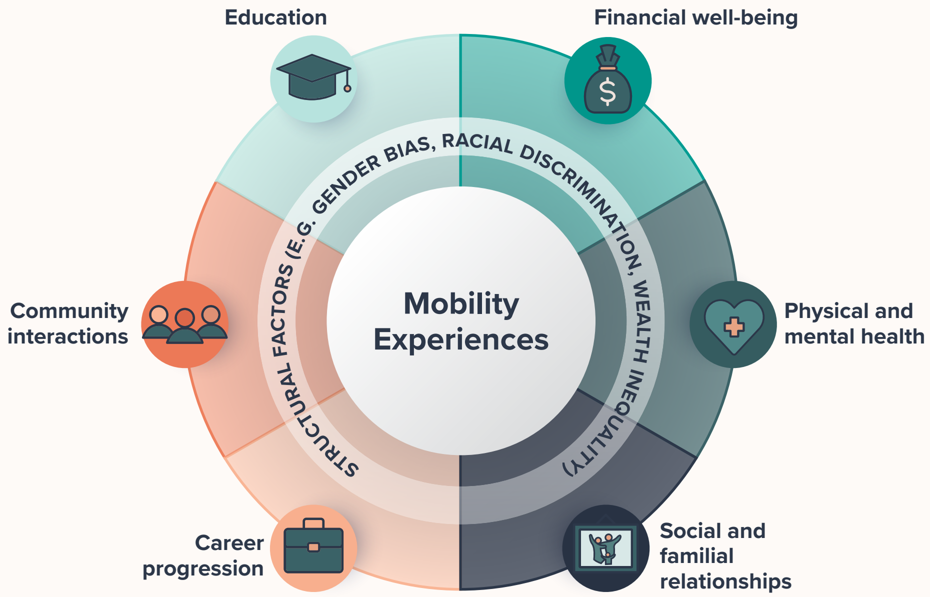
In the first section of this report, we share our findings on the flow of federal and philanthropic funding into the Mobility Experiences. Given the importance of funding in realizing economic mobility, we focus the remaining sections of the report on analyzing the impact, effectiveness, and accessibility of capital, offering insights on:

1. Improving how capital flows to the Mobility Experiences, particularly whether funding is supporting the Mobility Experiences shown to have the highest impact on lifetime income and/or those with the highest demand; and
2. Facilitating more effective deployment of funding and creating better access to capital by prioritizing proven interventions and building local capacities.

Each of these areas of insight inform recommendations for funders and practitioners to better channel investments to drive economic mobility.

Exhibit 1.1 Life experiences that exert outsized impact on economic mobility

Mobility Experiences occur across life stages and are influenced by an array of structural factors



CAREER PROGRESSION

- Avoiding involuntary unemployment
- Obtaining a first full-time job that offers opportunity for advancement
- Receiving job or skills training

FINANCIAL WELL-BEING

- Accessing non-wage employment-based benefits (including healthcare, retirement)
- Accessing public benefits and programs
- Experiencing financial inclusion (including financial education & access)
- Having student debt
- Owning a business

COMMUNITY INTERACTIONS

- Accessing stable, affordable housing
- Avoiding interactions with the criminal justice system
- Living in a high mobility neighborhood
- Having reliable and affordable access to physical and digital infrastructure (including transit & internet)

PHYSICAL AND MENTAL HEALTH

- Accessing care for mental and physical health conditions
- Accessing pre- and post-natal care
- Being born within a healthy birth weight
- Having access to adequate nutrition and a balanced diet in childhood
- Having low exposure to traumatic experiences (including ACEs)

EDUCATION

- Accessing extracurriculars during adolescence (including sports, clubs, work)
- Accessing pre-K and other early childhood development opportunities
- Avoiding repeated school disciplinary actions
- Completing high school education
- Graduating with a degree in a high-paying field of study
- Pursuing/completing postsecondary education

SOCIAL AND FAMILIAL RELATIONSHIPS

- Having strong social and professional networks
- Living with a working adult partner (including cohabitation, marriage)
- Not having to provide unpaid care for adult family members
- Not having to provide unpaid care for children
- Receiving mentorship during adolescence

Note: Please refer to the first report of the Mobility Experiences series, *Life Experiences that Power Lifetime Income*, for complete details on the quantitative impact of these life experiences on income.

Approach[i]

Federal funding comprises United States Office of Management and Budget (OMB) annual budget authority and United States Department of Treasury tax expenditure data for fiscal years (FY) 2019 and 2023.[ii] Throughout the report, FY2023 data (which spans October 1, 2022 to September 30, 2023) is the primary year reported, with FY2019 data incorporated for comparison. Values are reported as nominal dollars, while percent changes have been adjusted for inflation to more accurately reflect changes over time.

Philanthropic funding comprises grants from the Candid Foundation 1000 dataset, which includes all grants above $10,000 made by the 1,000 largest foundations in the United States in calendar years 2019 and 2022, which was the most recently available year of data. Throughout the report, 2022 data is the primary year reported. The report treats federal funding from FY2023 and philanthropic funding from 2022 as a single total year of giving, referred to as 2022/23 when reported together.

We exclude private sector funding from this research due to limitations in data availability and reliability. However, private sector funding is likely an important source of support for economic mobility, particularly for experiences in the *Career Progression*, *Financial Well-being*, and *Physical and Mental Health* domains, where there is high engagement of private funding and institutions.

We applied both a manual and automated tagging method to assign each federal account, tax expenditure, and philanthropic grant to a Mobility Experience. With this information, total funding was aggregated across the Mobility Domains and Experiences.

In addition to a landscape analysis, we conducted a more in-depth analysis on how funding is accessed and mobilized at a local level, with a particular focus on federal funding. We examined the relationship between federal funding and six local capacities for Mobility Experiences in the *Community Interactions* domain, particularly focusing on housing and community development, through a series of indicators that serve as proxies for local capacity for the 100 largest cities in the United States. Examples of indicators include the number of housing and community development employees in city governments, per capita revenue and assets of operating nonprofits in the housing and community development space, and per capita philanthropic funding for housing and community development.

i For the detailed methodology, please refer to the Technical Appendix.

ii Because the estimate for each tax expenditure assumes that other parts of the tax code remain unchanged, it is not strictly speaking accurate to sum the tax expenditures. However, we do so here to simplify our reporting and analysis.

2 Understanding How Capital Flows to the Mobility Experiences

In 2022/23, over $6 trillion in combined federal and philanthropic capital is invested in the Mobility Experiences, a 16 percent increase[i] from funding levels in 2019.

Funding to the Mobility Experiences is diverse, with wide variations in funding priorities between federal and philanthropic sources as well as from one philanthropic institution to the next (**Exhibit 2.1**).

Federal Funding

Broadly, federal funding is:

1. **Critically important**
   Over 99 percent of funding to the Mobility Experiences is provided by the federal government. In FY2023, federal funding accounts for over $6 trillion, while philanthropic funders provide $8.4 billion.
2. **Highly concentrated**
   Over 90 percent of federal funding that supports the Mobility Experiences is concentrated in two Mobility Domains: *Financial Well-being* and *Physical and Mental Health*.
3. **Present-oriented**
   Federal funding is largely focused on the Mobility Experiences that promote basic economic security. Over 70 percent of federal spending towards the Mobility Experiences goes towards administering social safety nets and public benefits, such as Social Security, Medicare, and Medicaid.

i Adjusted for inflation.

Philanthropic Funding

On the other hand, philanthropic funding is:

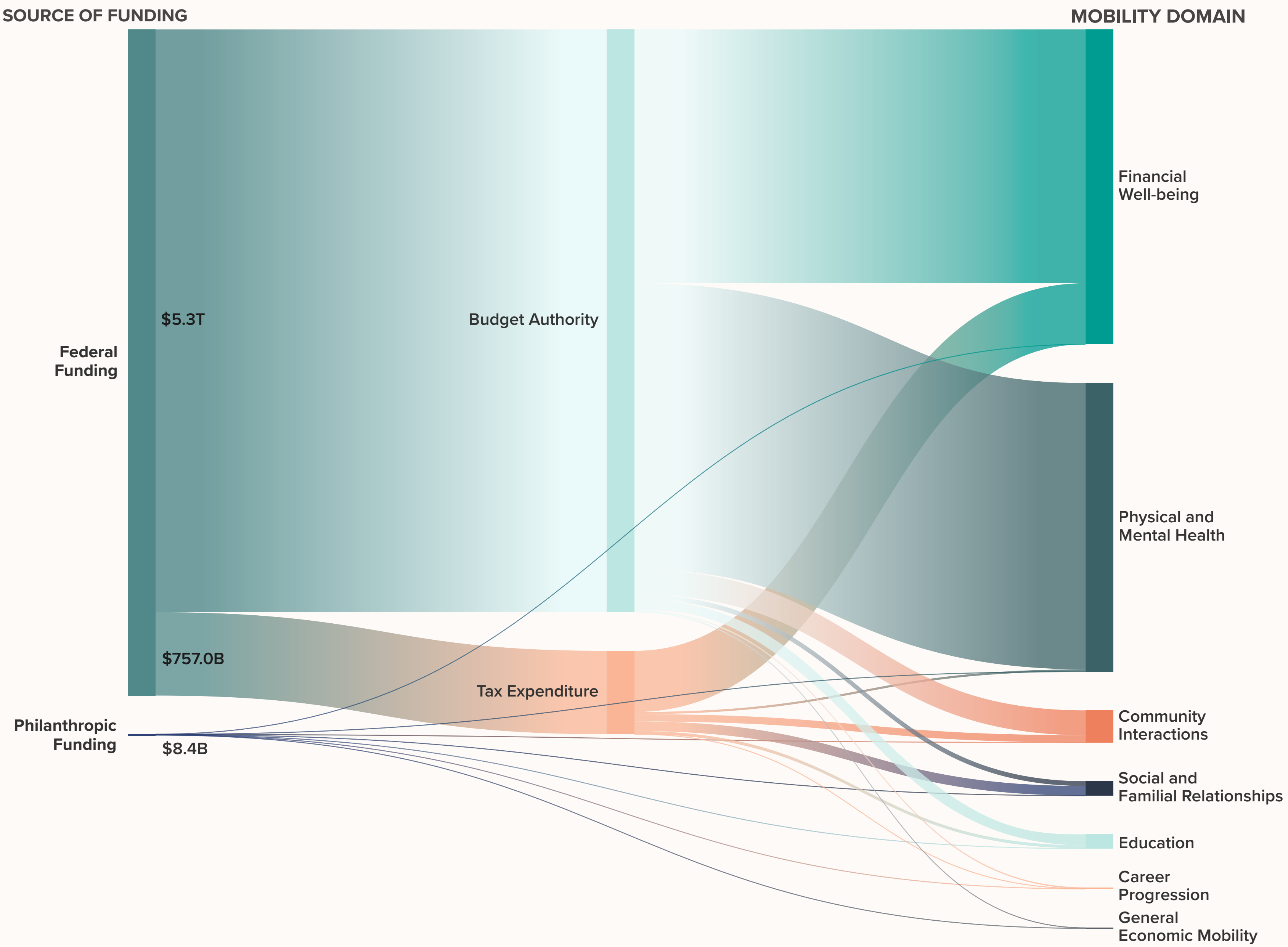
1. **Responsive**
   Philanthropic institutions have the flexibility to adapt funding priorities to meet emerging needs, in contrast to federal funding, where the majority of mandatory spending is for entitlement programs. In 2022, there is significant philanthropic funding towards key issues facing American society, such as racial justice and reproductive health.

2. **Broad**
   Philanthropic funding is more dispersed across the Mobility Experiences. In particular, we categorize nearly 13 percent of philanthropic funding as "General Economic Mobility," which includes funding that impacts more than one Mobility Experience or Domain.

3. **Future-oriented**
   Most philanthropic funding for the Mobility Experiences is invested in proactively driving upward economic mobility. Nearly 70 percent of philanthropic funding is for programs that improve education, workforce development, and social capital. It is important to note that since federal funding for economic mobility is hundreds of times greater than philanthropic funding, philanthropic funding will comparatively be limited in its ability to generate impact at scale.

For more detailed information on federal and philanthropic funding to the Mobility Experiences, including top funders, time-based trends, and funding comparisons, visit our interactive data dashboard at mobilityexperiences.org/capital-mapping-dashboard.

Exhibit 2.1 Federal and philanthropic funding, by domain, 2022/23



Source: Office of Management and Budget; U.S. Department of the Treasury; Candid Foundation 1000

Federal Funding Trends

Between fiscal years 2019 and 2023, we see a 16 percent increase[i] in federal funding to the Mobility Experiences and the highest federally funded Mobility Experiences are those related to social safety nets.

Federal funding increases were largely driven by an overall increase in the federal budget. The increase in federal funding is mostly spread across the Mobility Experiences with one experience seeing a large decrease*; accessing stable and affordable housing* decreased by 26 percent (adjusted for inflation) due to lower tax expenditures related to housing that year (**Exhibit 2.2**). Overall, 70 percent of federal funding in 2023 likely directly or indirectly supports access to the Mobility Experiences.

The Mobility Experiences with the highest funding levels include *accessing care for mental and physical health conditions, accessing public benefits and programs*, and *accessing non-wage employment-based benefits*, which account for 85 percent of total federal funding to the Mobility Experiences, or $5.2 trillion. These high funding levels are driven primarily by funding for Social Security, Medicare, and Medicaid programs. These programs are fundamental to the economic security of Americans and have

i Adjusted for inflation

the potential to support upward mobility out of poverty for recipients.[2] In recent years, funding to Social Security and Medicare has increased due to the growing population of Americans over the age of 65.[3]

Five experiences receive no federal funding, including *accessing extracurriculars during adolescence, being born with a healthy birthweight, having strong social and professional networks, living with a working adult partner*, and *receiving mentorship during adolescence*. It is important to note that because many of the Mobility Experiences interact with one another, support for these experiences may be captured by funding tagged to a different Mobility Experience.[i]

Refer to the Technical Appendix for additional details on our methodology for assigning federal funding to specific Mobility Experiences. Refer to Appendix A for additional detail on federal funding amounts for each Mobility Experience and Mobility Domain.

The Mobility Experiences with the lowest federal funding levels include *avoiding repeated school disciplinary actions, accessing pre- and post-natal care*, and *graduating with a degree in a high-paying field of study*, which combined account for just 0.02 percent of total federal funding, or $1.3 billion. Although these Mobility Experiences receive low levels of funding, this is not necessarily an indicator of highest areas of need; additional research is needed to understand what an adequate funding level is for each Mobility Experience to be accessible to all Americans. In Section 3, we analyze whether funding targets Mobility Experiences shown to have the highest impact and highest public interest in receiving support, to identify opportunities for additional investment.

i For example, the Department of Justice does fund an adolescent mentoring program, but the budget account that captures that pool of funding is primarily focused on crime prevention and thus was tagged to the Mobility Experience *avoiding interactions with the criminal justice system*. Similarly, the Supplemental Nutrition Assistance Program (SNAP) and Temporary Assistance for Needy Families (TANF) Program support *being born with a healthy birthweight* but are captured in the *accessing public benefits and programs* experience. In other cases, the Mobility Experience may not be a priority for funding at the federal level.

Exhibit 2.2 Total federal funding to the Mobility Experiences, FY 2023

Source: Office of Management and Budget; U.S. Department of the Treasury

Philanthropic Funding Trends

Between 2019 and 2022, we see a 36 percent decrease[i] in philanthropic funding from the top 1,000 philanthropies to the Mobility Experiences, with the top funded experiences shifting year to year.

Philanthropic funding advancing the Mobility Experiences makes up a little less than one-fifth of total philanthropic giving in 2022, among the largest 1,000 foundations.[ii] While there is a decline in philanthropic capital to the Mobility Experiences from 2019 to 2022 (**Exhibit 2.3**), overall philanthropic giving increases in that time by about $13 billion.[4] We see a significant decline in funding to education, in part driven by a large university endowment grant in 2019 worth over $1.3 billion. However, increases in philanthropic funding to other experiences, including a 9 percent increase in funding to the *Physical and Mental Health* domain and a 17 percent increase in funding to the *Social and Familial Relationships* domain (adjusted for inflation), likely

i Adjusted for inflation.

ii This report includes philanthropic giving intended for spending in the United States specifically aligned to the 28 Mobility Experiences. A large portion of total philanthropic giving supports international causes, such as global health.

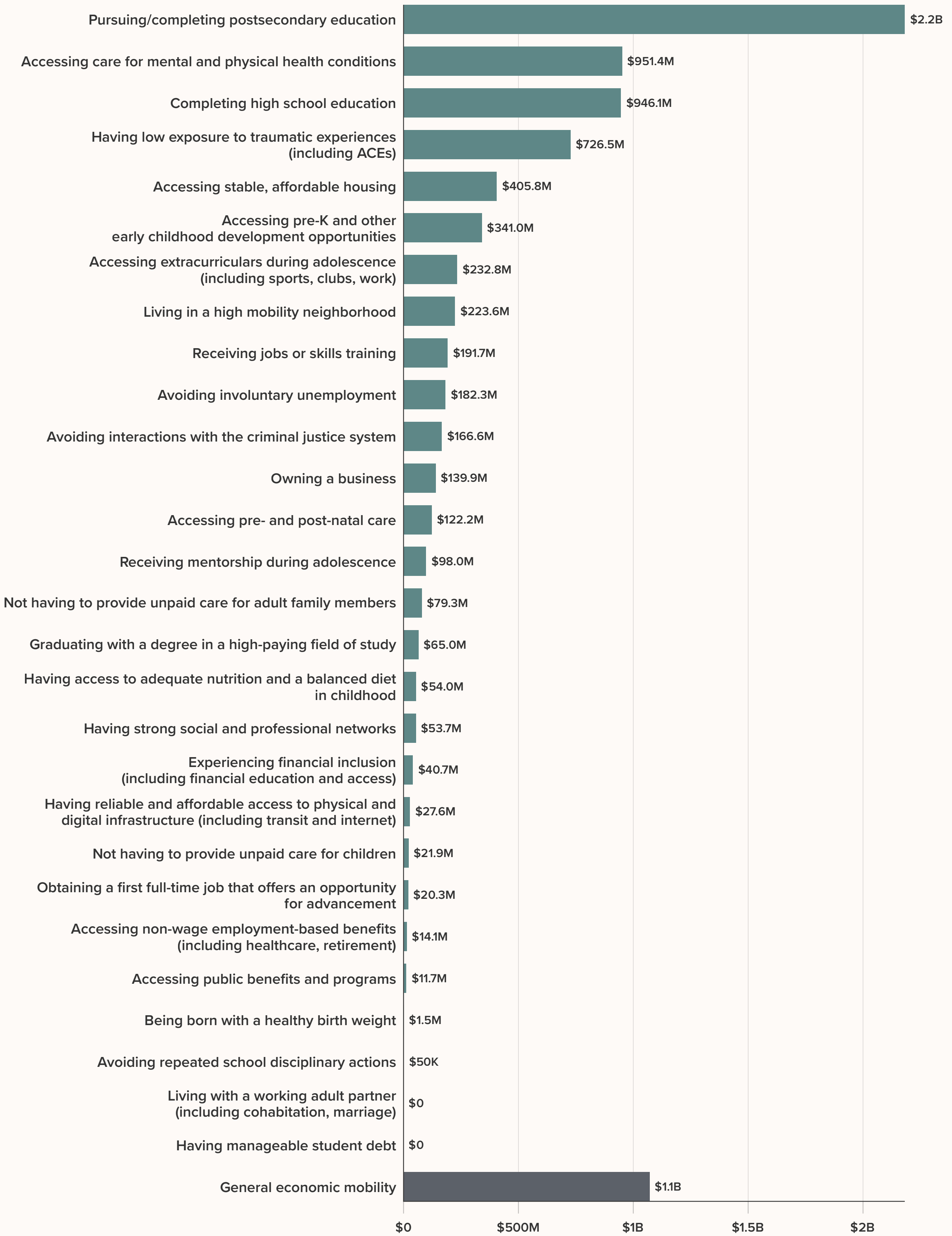
reflect shifting priorities among philanthropic funders in response to emerging issues between 2019 and 2022, such as the COVID-19 pandemic and the racial justice reckoning in 2020.

Refer to Appendix B for additional detail on philanthropic funding amounts for each Mobility Experience and Mobility Domain.

The highest funded Mobility Experiences in 2022 include *pursuing/completing postsecondary education, accessing care for mental and physical health conditions*, and *completing high school education*, which account for 49 percent of total philanthropic funding to the Mobility Experiences, or $4.1 billion. Many grants to postsecondary institutions are large donations that support university endowments and capital improvements, which may less directly impact students' attendance and graduation from postsecondary education compared to scholarships.

The Mobility Experiences with the lowest funding levels include *avoiding repeated school disciplinary actions, being born with a healthy birthweight*, and *accessing public benefits and programs*, accounting for just 0.2 percent of total philanthropic funding, or $13.3 million. Given the overlap between experiences, *avoiding repeated school disciplinary actions* and *being born with a healthy birthweight* are likely captured under other education- and health-related Mobility Experiences. *Accessing public benefits and programs* is more within the federal government's mandate, so it is unsurprising that it receives lower levels of funding. Two experiences receive no philanthropic funding: *having manageable student debt* and *living with a working adult partner*. This may be because philanthropic capital that impacts the amount of debt taken on by students, such as scholarships, is captured under the *pursuing/completing postsecondary education* Mobility Experience. Additionally, the crux of the Mobility Experience *living with a working adult partner* is access to employment for both members of a household, which is largely captured by giving to experiences in the *Career Progression* domain.

Exhibit 2.3 Total philanthropic funding to the Mobility Experiences, 2022



Note: General economic mobility encompasses funding that impacts more than one Mobility Experience or Domain

Source: Candid Foundation 1000

Philanthropic Foundation Types

Our analyses suggest that different types of philanthropic institutions[i] fund different Mobility Experiences (Exhibit 2.4).

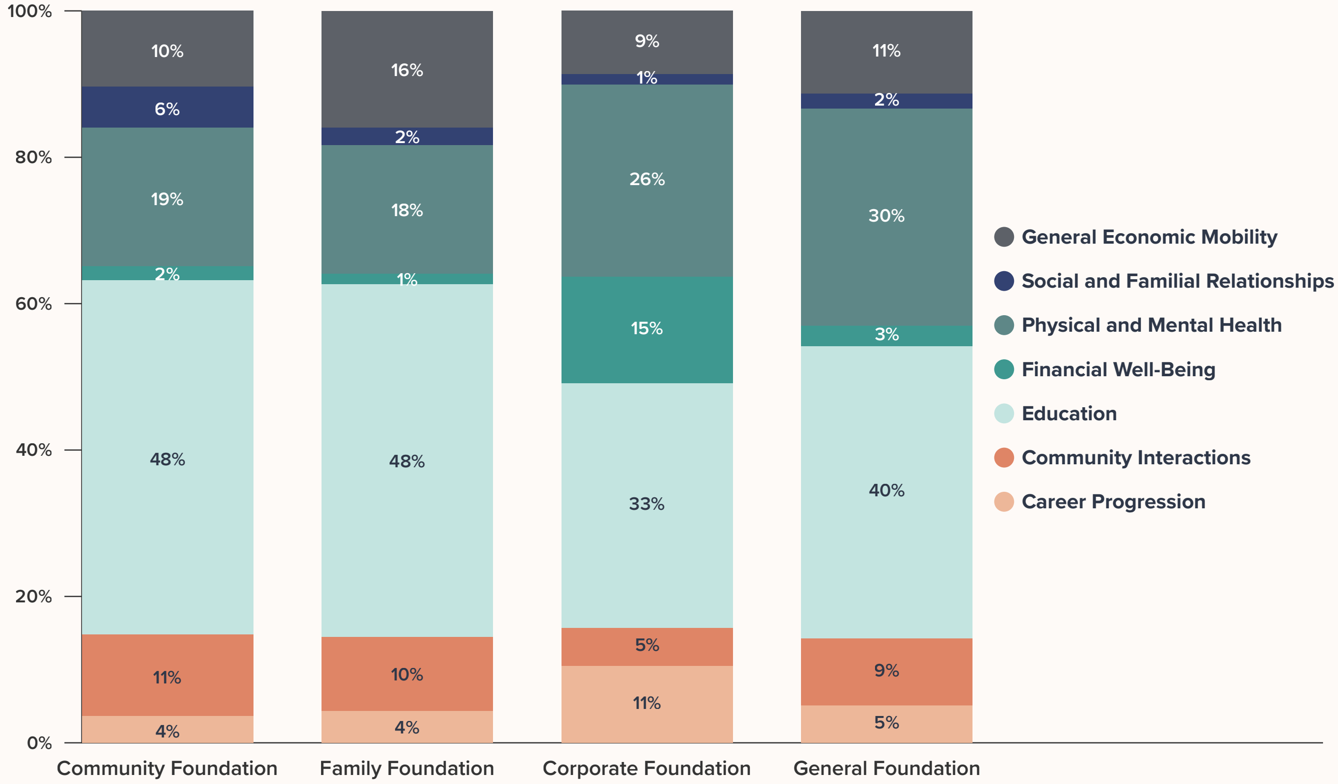
Community and family foundations tend to align in their financial contributions and focus primarily on providing grants to education and health. In 2022, community foundations and family foundations provide $1.3 billion and $2.2 billion, respectively, to the *Education* and *Physical and Mental Health* domains. Many of these grants are place-based, supporting specific communities, school districts, or local branches of organizations.

Corporate foundations more heavily prioritize the *Financial Well-being* domain, giving about 15 percent, or $48.1 million, of their 2022 funding towards experiences in that domain, compared to community and family foundations, which give just two percent and one percent of funding, respectively. Corporate foundations also granted considerable funding to experiences in the *Career Progression* domain, with 11 percent, or $34.8 million, of 2022 funding supporting that

i The analysis focuses on four types of institutions: community foundations, family foundations, corporate foundations, and general foundations. General foundations comprise organizations listed in the Foundation 1000 dataset as independent or operating foundations or public charities.

domain, more than double the proportion of funding given by other foundation types. These investments are often closely aligned with corporate foundations' interests in supporting the future of their workforce. We see that these giving trends hold true over time, with community, family, and corporate foundations generally giving to Mobility Domains in similar proportions in 2019.

Exhibit 2.4 Proportion of funding to Mobility Domains, by foundation type, 2022



Source: Candid Foundation 1000

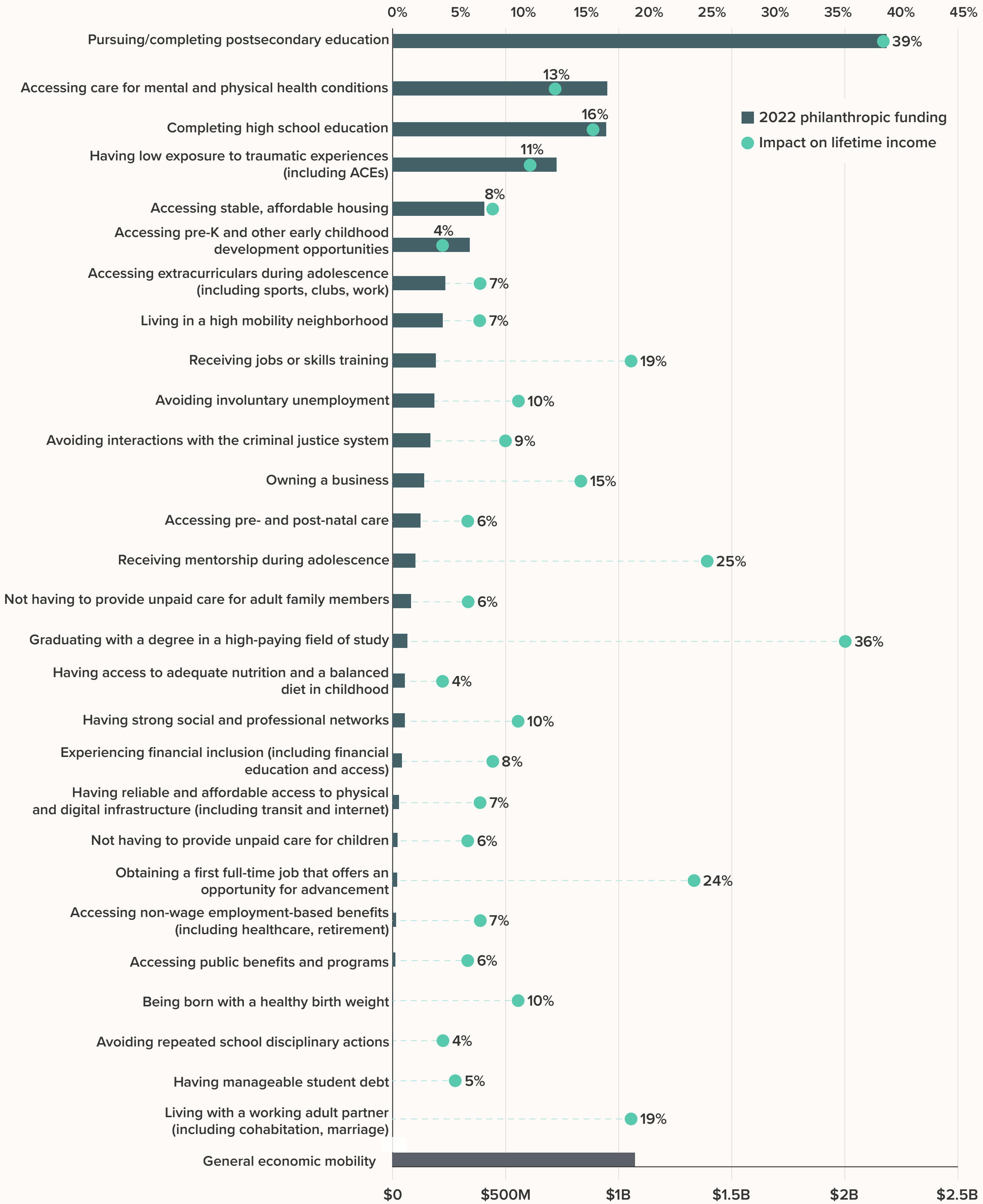
3 Improving How Capital Flows to the Mobility Experiences

Capital invested into the Mobility Experiences could achieve greater economic mobility impact by prioritizing the Mobility Experiences shown to most increase lifetime income and for which most Americans express interest. The intersection of high financial impact and high public interest is a critical balance of both effectively driving upward mobility while also meeting the stated needs of Americans.

There are opportunities for capital to better prioritize the Mobility Experiences shown to most impact lifetime income.

To better understand the potential of funding to impact economic mobility, we analyze to what extent federal and philanthropic funding supports the Mobility Experiences found to increase lifetime income. Based on our impact analysis, we found that the three Mobility Experiences that most increase lifetime income for individuals are: *pursuing/completing postsecondary education* (39 percent impact), *graduating with a degree in a high-paying field of study* (36 percent impact), and *receiving mentorship during adolescence* (25 percent impact).

Exhibit 3.1 Total philanthropic funding vs. impact of Mobility Experiences on lifetime income, 2022



Source: Candid Foundation 1000; Camber Collective Mobility Experiences

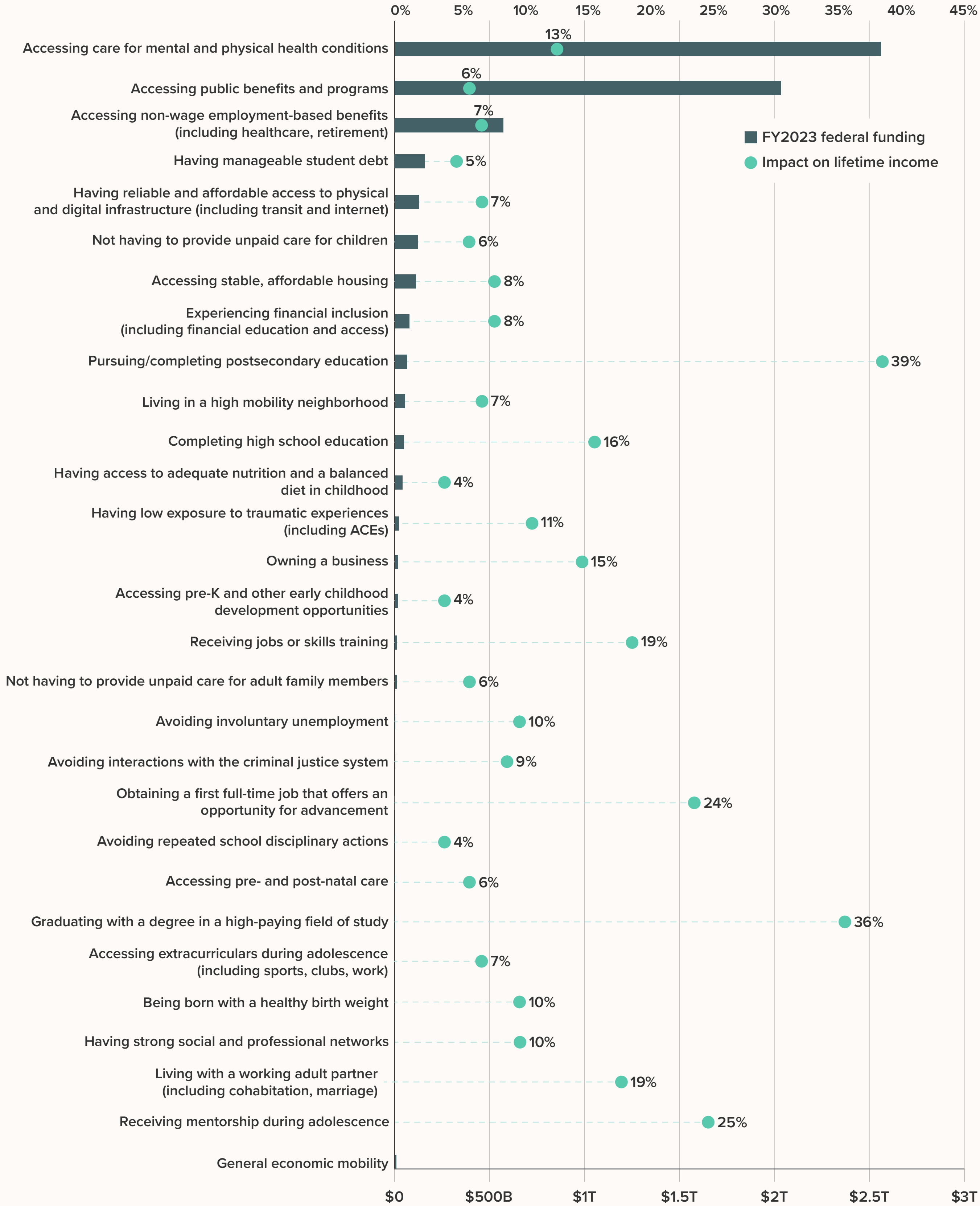
Philanthropic funding is aligned to select Mobility Experiences with high impact on lifetime income (Exhibit 3.1).

While neither federal nor philanthropic funding is universally aligned to the most financially impactful Mobility Experiences, philanthropic funding is focused primarily on the *Education* domain, which contains the two most impactful Mobility Experiences. The experience with the highest impact on lifetime income, *pursuing/completing postsecondary education*, is also the experience that is most highly funded, capturing 26 percent of philanthropic funding. While the second most impactful experience—*graduating with a degree in a high paying field of study*—receives comparatively little philanthropic funding, it is likely that funding for postsecondary education concurrently drives the attainment of degrees in high-paying fields, as approximately 40 percent of conferred bachelor's degrees are in high-paying fields, including business, engineering, computer science, and medicine.[5] Comparatively, less than one percent of total federal funding supports these two experiences. Notably, public education in the United States is largely funded by state and local governments, with just 11 percent of K–12 funding coming from federal sources.[6] As a result, education-related Mobility Experiences appear vastly underfunded at the federal level in this analysis.

Federal funding prioritizes experiences that are less effective at increasing lifetime income, but which represent an important social safety net for Americans and may drive other pillars of economic mobility, such as power and autonomy (Exhibit 3.2).

The three top-funded Mobility Experiences at the federal level—*accessing care for mental and physical health conditions, accessing public benefits and programs*, and *accessing non-wage employment-based benefits*—total 85 percent of funding but each have estimated impacts on lifetime earnings of less than 15 percent. Despite their moderate financial impact, these experiences make up critical social safety nets. Social Security, Medicare, and Medicaid, utilized by 20 percent,[7] 26 percent, and 20 percent of Americans,[8] respectively, are the three most highly funded federal programs that ensure the most vulnerable Americans have access to basic needs and services. Additionally, funding for non-wage employment-based benefits represents an important financial incentive to companies to offer retirement and healthcare plans to employees. Broadly, the federal government invests more funding into Mobility Experiences that support the basic needs of Americans, such as healthcare and poverty alleviation, whereas

Exhibit 3.2 Total federal funding and impact of Mobility Experiences on lifetime income, FY2023



Source: Office of Management and Budget; U.S. Department of the Treasury; Camber Collective Mobility Experiences

the experiences with the highest impact on lifetime income are tied more to second order needs such as education and quality jobs. Though not a focus of this report, funding for social safety nets is likely an important contributor to Americans' feelings of power and autonomy, a key pillar of economic mobility in addition to income.[9] **Exhibit 3.2** shows the federal funding level of each Mobility Experience and compares it to the relative impact the Mobility Experience has on lifetime income.

Both federal and philanthropic funding miss key opportunities to support experiences critical to workforce development and social capital.

Three Mobility Experiences, *receiving mentorship during adolescence, obtaining a first full-time job with opportunity for advancement* and *receiving job or skills training*, can increase average lifetime income by 25 percent, 24 percent, and 19 percent, respectively, but receive just 0.2 percent of federal funding[i] and 3.7 percent of philanthropic funding collectively. Funding across the *Career Progression* and *Social and Familial Relationships* domains is limited relative to other domains like *Physical and Mental Health* or—in the case of philanthropic funding—*Education*. Interventions that focus on workforce development and build social capital can support Americans to develop strong networks and achieve high-paying careers, even without a postsecondary degree. As perceptions of the importance of attending a four-year university waver, interventions to support career progression through alternative paths like vocational training can help improve access to career-related Mobility Experiences for all Americans.[10]

The size of the affected population should also be taken into consideration when prioritizing high-impact Mobility Experiences.

Taking into consideration the number of people impacted by access to a Mobility Experience (in addition to the individual income impact) may shift which Mobility Experiences have the greatest potential impact at the population level. For example, receiving *access to care for mental and physical health conditions* is likely to be beneficial to the whole United States population, roughly 335 million[11] Americans, while *not having to provide unpaid care to children* is beneficial only to the 26 million[12] Americans with young children. For funders interested in maximizing the breadth of impact, assessing the total number of people that will be reached is critical.

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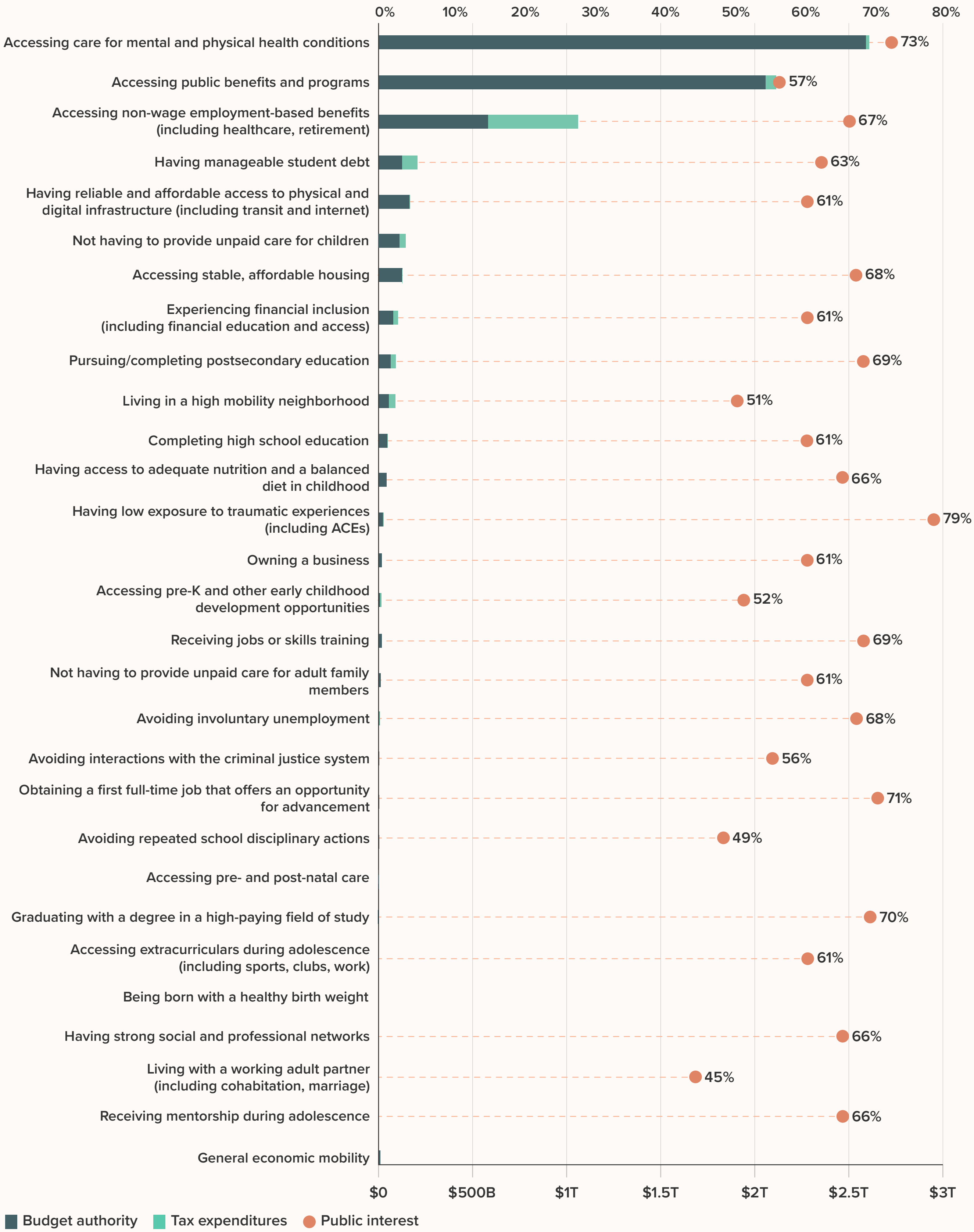
i Federal funding for mentorship is underestimated in this analysis, because it is supported by other programs that receive federal funding which are categorized as a different mobility experience. Namely, the United States Department of Justice's Juvenile Justice Programs account encompasses many different initiatives, primarily including crime prevention but also youth mentoring. This account is classified as supporting the avoiding interactions with the criminal justice system Mobility Experience given its primary crime prevention purpose. The data used for this research has limited granularity into how federal agency budgets are split between programs which may result in under- or over-estimation across experiences.

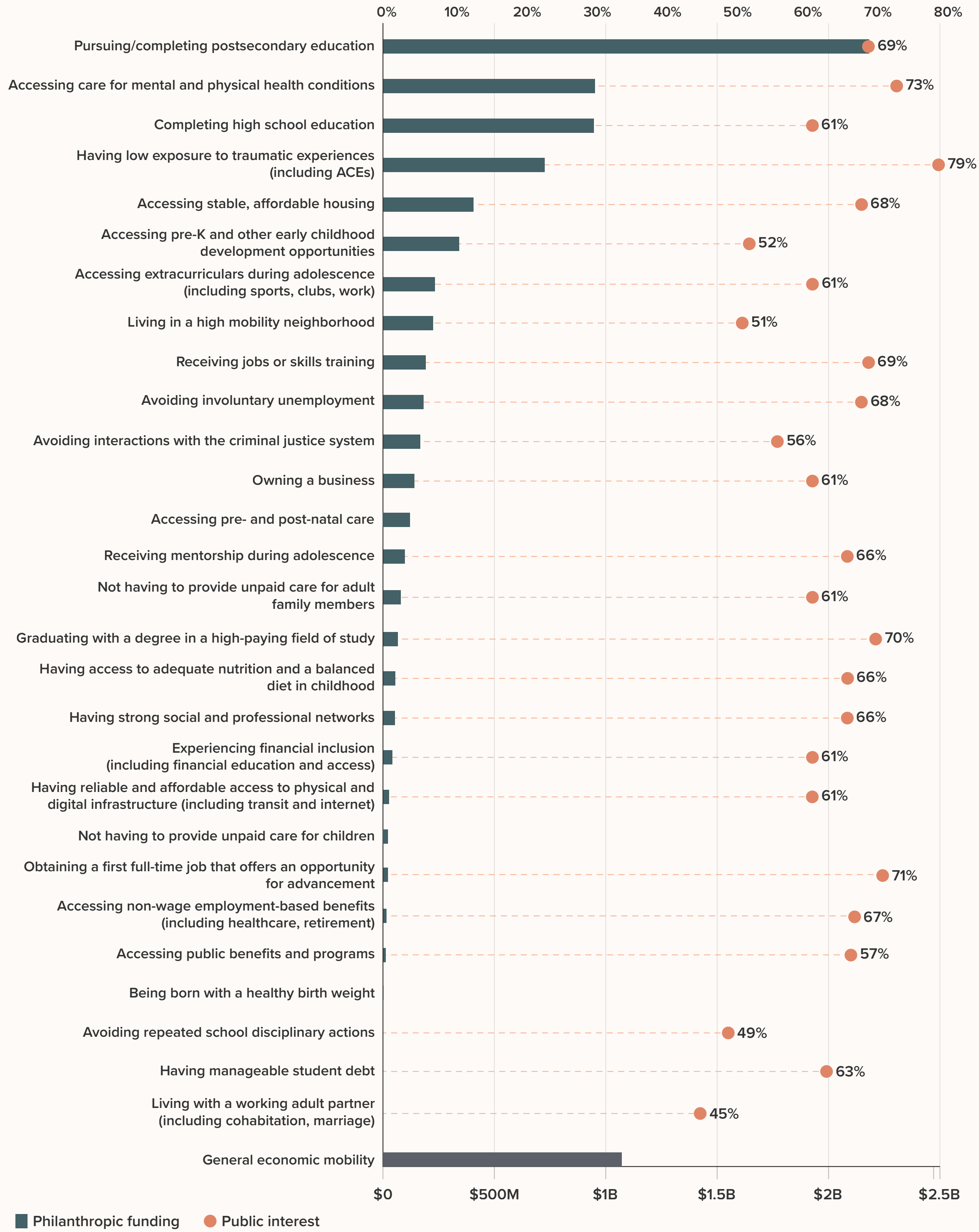
Exhibit 3.3 Federal funding vs. public interest in support, FY2023



Note: Experiences with no reported interest in support were added to the Mobility Experiences research after the survey was conducted.

Source: Office of Management and Budget; U.S. Department of the Treasury; Camber Collective Mobility Experiences

Exhibit 3.4 Philanthropic funding vs. public interest in support, 2022



Note: Experiences with no reported interest in support were added to the mobility experiences research after the survey was conducted.

Source: Office of Management and Budget; U.S. Department of the Treasury; Camber Collective Mobility Experiences

Funding trends are generally aligned with the Mobility Experiences for which most Americans are interested in receiving support.

Integrating lived experience into funding decisions can ensure that Americans' expressed needs are prioritized, leading to greater participation and engagement.[i]

We analyze whether federal and philanthropic funding is going towards the Mobility Experiences for which Americans have most expressed interest in receiving support. In this context, we define "support" as a program or service to help individuals navigate the Mobility Experience in a way that is beneficial to them (**Exhibits 3.3** and **3.4**). The three Mobility Experiences with the highest interest in support are: *having low exposure to traumatic experiences* (79 percent interest), *accessing care for mental and physical health conditions* (73 percent interest), and *obtaining a first full-time job that offers opportunity for advancement* (71 percent interest).

i The percent of Americans interested in receiving support to access a Mobility Experience is drawn from a survey of over 4,000 Americans conducted by Camber Collective. For more details on the survey findings, please refer to the second report in the Mobility Experiences research series, *Americans' Perspectives on Economic Mobility*.

Both philanthropic and federal funding are well-aligned to public demand for access to healthcare, though opportunities remain to ensure equitable access to care.

While the impact of *accessing care for mental and physical health conditions* on lifetime income is 13 percent, 73 percent of Americans report an interest in receiving support to achieve the Mobility Experience. Philanthropic and federal funding support this demand, with healthcare funding ranking third for philanthropic funding and first for federal funding. However, more than 60 percent of federal spending on healthcare supports access for Americans over the age of 65, via Medicare. In addition, American households earning within the lowest income quintile are estimated to spend over one third of their incomes on healthcare.[13] This means many Americans are excluded from support who would reap significant economic mobility benefits from access to affordable healthcare, despite programs like Medicaid. The high public interest in this experience may speak to the ongoing inadequacies of the United States healthcare system to meet the needs of most Americans.

Philanthropic funding differs from federal funding in its flexibility, with many grants serving specific community needs. For example, many philanthropic grants support health equity in targeted communities or are focused on reproductive healthcare, support for which faces headwinds at the federal level. Philanthropic organizations' ability to target their investments is essential for improving healthcare outcomes and ensuring equitable access to services for all individuals; however, the magnitude—and thus potential benefit—of philanthropic funding is significantly smaller than federal funding.

The Mobility Experience with the highest public interest, *having low exposure to traumatic experiences (including adverse childhood experiences, or ACEs*), is well-funded by philanthropic institutions but receives comparatively limited funding at the federal level.

While the federal government does fund child welfare programs, which contribute to the prevention of traumatic experiences, the amount is significantly lower than funding for entitlement programs like Social Security. Less than 0.4 percent of federal funding goes to supporting *having low exposure to traumatic experiences (including ACEs)*. On the other hand, nearly nine percent of philanthropic funding supports the experience, with a significant amount supporting child welfare programs, such as Court Appointed Special Advocates. Additional investment into interventions that limit Americans' exposure to traumatic experiences, especially for children, would likely be met with broad public support.

Federal funding is better aligned to the interests of Americans earning less than 200 percent of the federal poverty level (FPL).

Americans living in or near poverty are 8.5 percentage points more likely than the general public to express interest in receiving support for two Mobility Experiences: *having reliable and affordable access to physical and digital infrastructure* and *accessing public benefits and programs*. These two experiences are well-funded at the federal level, receiving 2.1 percent and 33.6 percent of federal funding, respectively. *Having reliable and affordable access to physical and digital infrastructure* receives the fifth highest amount of federal funding. This alignment is a promising indicator that federal funding to economic mobility may be well aligned to the expressed needs of the most economically vulnerable Americans, so long as the funding is deployed to effectively address those needs.

The strong alignment of philanthropic funding and public interest may be driven by philanthropies' explicit missions, flexibility, and public visibility.

Philanthropic funders often operate with the explicit mission to improve the well-being of the most vulnerable or marginalized populations, for whom economic mobility initiatives can have the greatest impact. While the federal government administers key initiatives that support the most vulnerable Americans, the government has a broader mandate to support all Americans. In addition, philanthropic funders have flexibility to adapt quickly to emerging needs. As threats or opportunities emerge, foundations can shift resources to meet the growing need. For example, following the murders of Ahmaud Arbery, Breonna Taylor, and George Floyd in 2020, significant philanthropic dollars were shifted to fund racial justice initiatives.[14] Federal dollars require appropriations by Congress or are allocated through mandatory spending, limiting its flexibility to shift funding year to year. Lastly, philanthropic giving has become increasingly scrutinized by the public, resulting in pressure to align philanthropic capital with public narratives surrounding key issues. This trend may be beneficial to ensuring large-scale philanthropic giving is aligned with the expressed needs of communities rather than the private motivations of foundation leaders.

Investing at the Intersection of Impact and Demand

Funders are likely to achieve high impact and strong public engagement by supporting the Mobility Experiences that maximize both the individual impact on lifetime income and public interest in receiving support for those experiences.

In **Exhibit 3.5** and **3.6** following, the Mobility Experiences in the upper right quadrants are of particular importance — these have an impact on lifetime income above 10 percent and a public interest in support above 60 percent, meaning that over 60 percent of Americans would like to receive support in accessing that experience.[i]

i Note that the two exhibits are on different scales.

Exhibit 3.5 Federal funding to the Mobility Experiences, by impact on lifetime income and public interest, FY2023

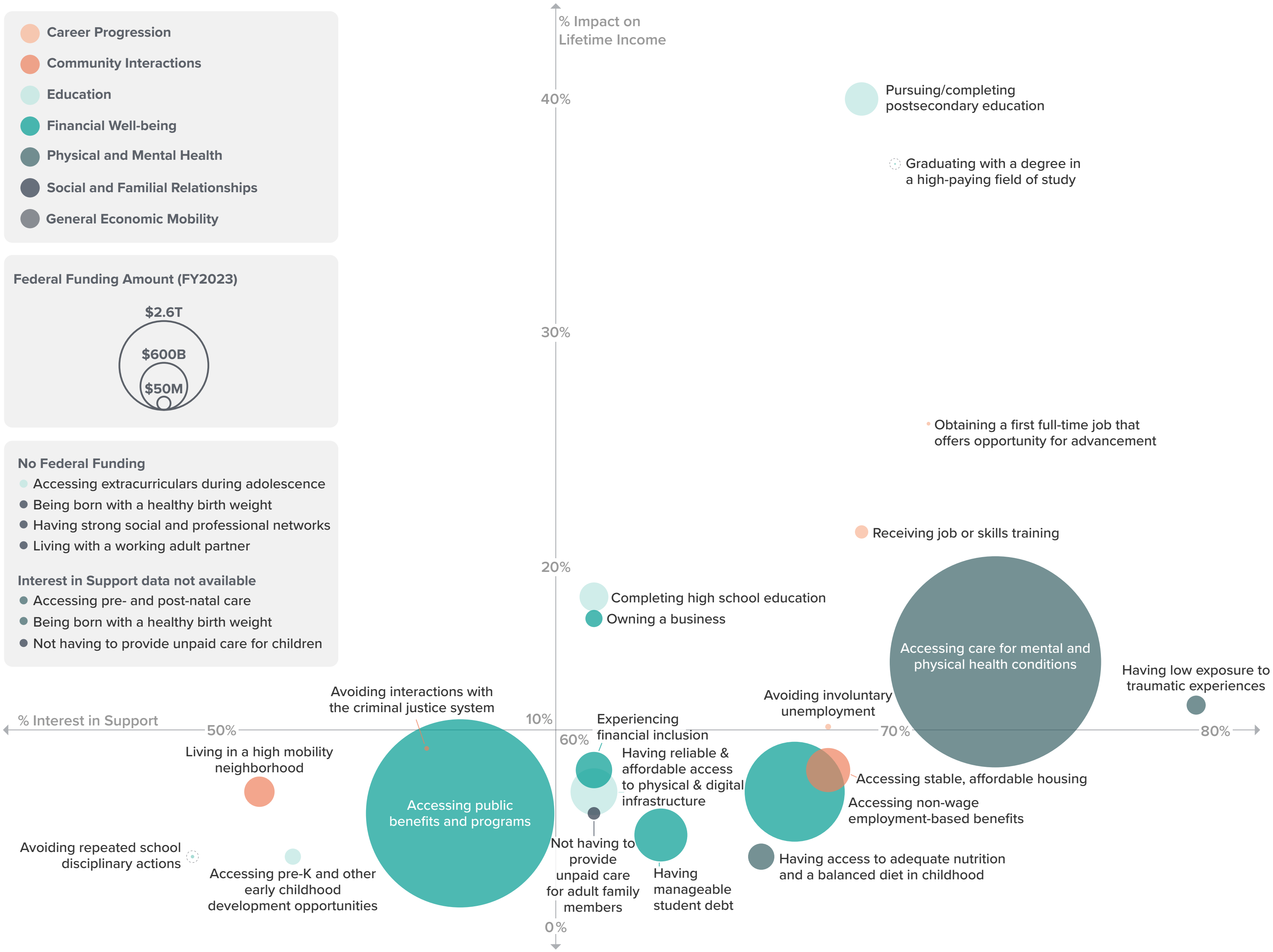
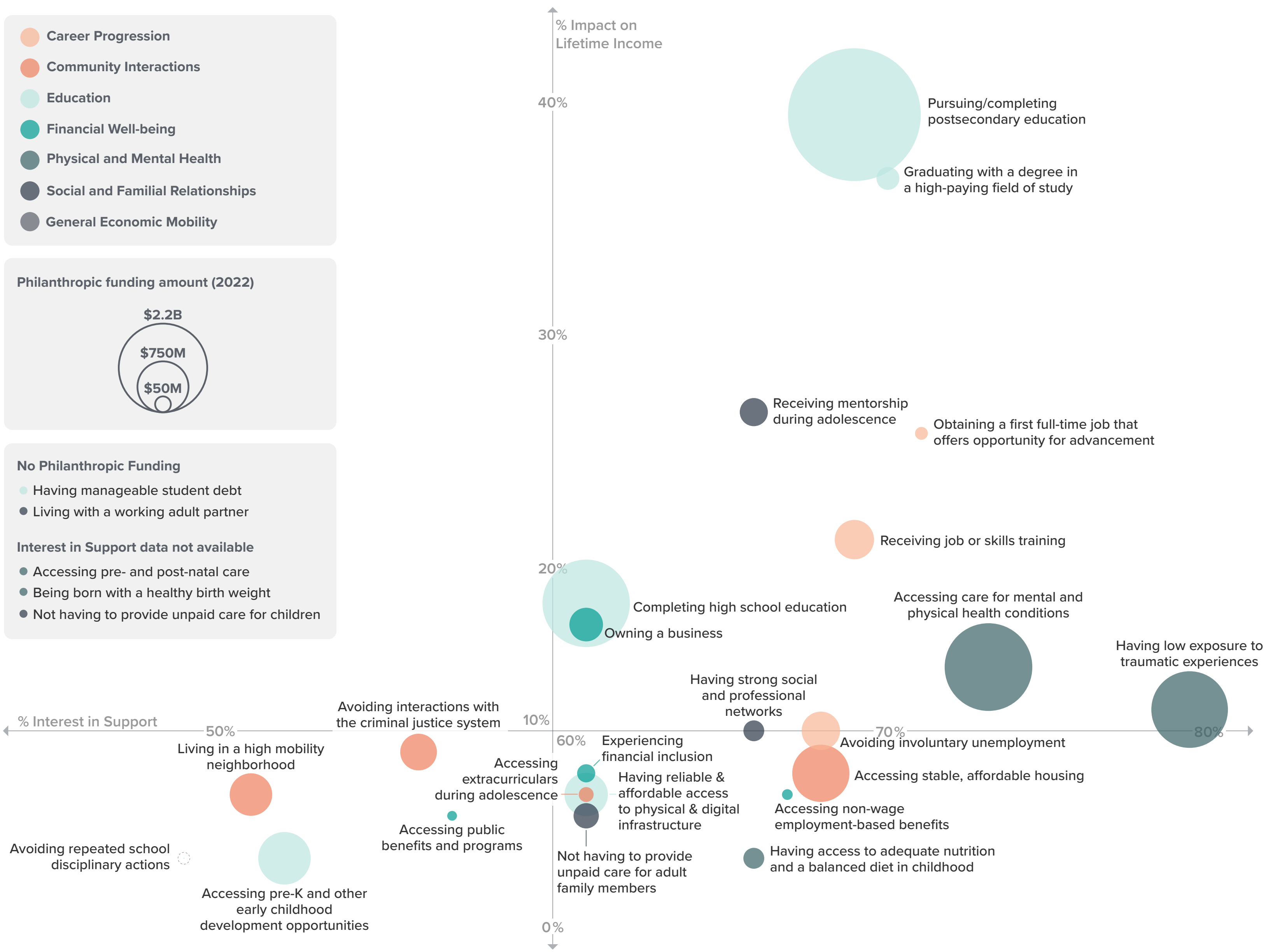


Exhibit 3.6 Philanthropic funding to the Mobility Experiences, by impact on lifetime income and public interest, 2022



Recommendations to maximize funding's impact and alignment to public needs

Increase investment in—and influence public dollars for—Mobility Experiences that receive limited funding[i] with high impact on lifetime income and strong public interest in support, including:

- Graduating with a degree in a high-paying field of study;
- Receiving job/skills training;
- Avoiding involuntary unemployment;
- Obtaining a first full-time job with opportunity for advancement;
- Owning a business;
- Receiving mentorship in adolescence; and
- Having strong social and professional networks.

Continue to fund experiences across the *Physical and Mental Health* domain, given high levels of interest in receiving support for those experiences, particularly:

- Accessing care for mental and physical health conditions; and
- Having low exposure to traumatic experiences (including ACEs).

Improve the return on investment for funding to *pursuing/completing postsecondary education* by prioritizing college-readiness and affordability of postsecondary education for Americans from low-income households.

Prioritize measuring both the impact of funded interventions on economic mobility and beneficiary interest in and satisfaction with those interventions, to ensure beneficiaries' stated needs guide funding decisions.

i Additional research is needed to understand what the adequate funding level is for each experience, and whether current funding levels are either too high, too low, or meet the existing need.

4 Making Capital More Effective

Capital invested into the Mobility Experiences can be made more effective by integrating characteristics of high impact interventions into new and existing programming, as well as building local capacities to better access and deploy funding in communities.

Incorporating long-term sustained support, wrap-around services, and beneficiary input into interventions can improve the impact of funding for economic mobility.

"Interventions"— actions, programs, and/or models — that help someone better reach a Mobility Experience and attain positive outcomes, mitigate negative outcomes, and/or overcome structural barriers can improve the effectiveness of even limited funding. In our analysis of over 200 program evaluations related to 12 of the Mobility Experiences,[i] we found three common characteristics of effective interventions: long-term sustained support, wrap around services, and beneficiary input. Both federal and philanthropic funders can prioritize or integrate these characteristics in new and existing programming to drive improved upward mobility for beneficiaries.

Refer to Appendix C for a deeper look at Mobility Experience-specific high-impact interventions.

i The selection of Mobility Experiences was based on factors that include the relative impact of each experience on economic mobility, reported demand for support as determined by our survey of 4,000 Americans, and data availability. Across these experiences, 200 program evaluations were analyzed — including randomized controlled trials, longitudinal assessments, and regression analyses — for leading interventions. Throughout the research, insights from the lived experiences survey and interviews with everyday Americans provided a reference point with which to ensure the findings reflect what people believe is important and impactful, as well as where they report help is needed. This practice identified select trends and common features associated with effective interventions, scaling, and innovation that may apply across Mobility Experiences.

Interventions that offer a full complement of related support services often have the highest impact.

Optimally, interventions should include wrap-around services that offer: (1) support that directly relates to the specific Mobility Experience and (2) support that addresses the structural obstacles preventing people from fully accessing the potential benefits of that experience. For example, a housing access program might provide holistic assistance, such as moving expenses, food, and access to additional public benefits, to support participants to move to high mobility neighborhoods. It is important to note that comprehensive wrap-around programs tend to be costly, but assessing and quantifying their long-term benefits to society could help mobilize additional funding to support those additional components.

Sustained support — occurring before, during, and after a Mobility Experience — is linked to more significant, positive outcomes in the long-term.

Evidence suggests that programs offering extended support over a longer period often have greater impact. Particularly for Mobility Experiences that have compounding effects on other aspects of livelihood, providing sustained support can impact various drivers of economic mobility. For example, a sustained effort to reintegrate formerly incarcerated populations might support participants both during and after incarceration by providing follow-up services — such as assisting with employment, identifying transitional housing, and mentoring — to reduce recidivism, improve positive outcomes, and increase economic mobility.[15]

EXAMPLE OF WRAP-AROUND SERVICES AND COMPREHENSIVE SUPPORT

Year Up provides a wide array of supports — from skills training and paid internships at high-paying companies to guidance from alumni, networking, and professional skills coaching—and has had a substantial impact on participants, **whose earnings have increased by 34 percent** within four years of graduating from the program. In practice, participants receive both financial assistance and hard skills training and career opportunities while in the program. Crucially, participants also receive soft-skill development support, mentoring, and coaching, services that participants acknowledge as key for success.[17]

EXAMPLE OF LONG-TERM SUSTAINED SUPPORT

EMPLOY, a prisoner-reentry employment program implemented by Minnesota Department of Corrections, support starts 60 to 90 days prior release and is sustained up to 12 months after release, leading to a **72 percent increase in the likelihood of securing employment in the first 12 months**.[16]

Engaging with beneficiaries throughout the intervention lifecycle can lead to better outcomes.

Structured and intentional collaboration with beneficiaries can occur at three key points in an intervention's lifecycle: (1) during the design phase, to properly understand beneficiaries' needs and preferences; (2) during the implementation phase, to continuously improve ongoing programs; and (3) after the program is over, to understand overarching outcomes and codify lessons learned.[18] When this happens, programs are designed based on beneficiary needs and lived experience expertise, as well as adapted based on new learnings or changes in circumstances. Evidence suggests that when a program is adapted to the local context, it increases the likelihood of the program's acceptance by the target population, leading to better outcomes.[19]

EXAMPLE OF BENEFICIARY INPUT FOR CO-DESIGN AND CONTINUOUS IMPROVEMENT

LIFT, a national nonprofit organization focused on breaking the cycle of poverty, actively engages with its members — parents and caregivers earning low incomes — to co-design its programs and services. Through regular surveys and feedback sessions, including input from a 2022 survey of over 1,000 members, LIFT gathers detailed input about their members' experiences and challenges. This valuable feedback has led to the creation of new financial coaching programs, resulting in **75 percent of members reporting improved financial security.**[20]

Stakeholders can amplify the impact of interventions through cross-sector coordination and equity-focused decision making.

Research shows that economic mobility is influenced by experiences that occur across nearly every life circumstance; cross-sector coordination will be key to improving interventions and expanding funding.

Expanding funding for economic mobility requires breaking down silos and engaging stakeholders working across diverse sectors and domains to recognize the ways in which their work impacts Americans' economic mobility. This approach not only unlocks new funding across issue areas but also improves the effectiveness of funding by addressing the cross-cutting nature of many of the Mobility Experiences. For example, health and employment are often reinforcing–health has been shown to impact employment outcomes and employment is often a necessary precondition to accessing affordable healthcare and can have negative impacts on health.[21] Rather than siloing funding to address health or employment outcomes separately, which can be duplicative or miss key opportunities for impact, funders should coordinate to more holistically meet the needs of beneficiaries.

While each Mobility Experience presents a substantial opportunity to impact economic mobility for all populations, evidence reveals that, for most interventions, individuals with incomes below 200 percent of the FPL stand to benefit most.

Economically insecure Americans often face greater structural barriers to accessing and benefiting from key Mobility Experiences. Many low-income Americans, for instance, struggle to access healthcare because they are less likely to have health insurance and fewer doctors are located in low-income communities.[22] Accordingly, interventions that address structural barriers are particularly likely to provide outsized benefit to lower-income Americans. For funders interested in driving upward mobility for Americans in poverty, equity is a critical consideration when evaluating which Mobility Experiences should be funded, beyond just those with the highest impact on lifetime income. Access to public benefits or financial inclusion, for example, are most likely to positively benefit Americans earning low incomes, and therefore these experiences represent important opportunities to fund.

Recommendations to fund effective interventions

Channel funding towards programs with longer time horizons that offer sustained support; provide funding for program extensions and sustained support.

Use funding to add on wrap-around services or comprehensive support to existing programs.

Design programs that source and incorporate beneficiary input throughout the project lifecycle.

Support specific interventions shown to drive positive outcomes for Mobility Experiences with high impact on lifetime income and high public interest (see Appendix C for additional examples of high impact interventions for the Mobility Experiences):

- *Graduating with a degree in a high-paying field of study*
  - Wrap-around services: Offering academic (e.g., residential education, mentoring, networking), practical (e.g., internship, research), and administrative support (e.g., college applications); and
  - Sustained support during K-12 tenure: Incorporating project-based learning opportunities into existing curricula.
- *Receiving mentorship in adolescence*
  - Tailored supports to beneficiaries: Providing one-on-one advising and mentoring that focus on specific challenges that the mentee is facing.
- *Career Progression* (related Mobility Experiences within the domain)
  - Wrap-around services: Offering skillset development as well as job placement support (e.g., case management, job search assistance);
  - Holistic support for skillset development: Assisting beneficiaries in developing both technical skills (e.g., occupational and job-development skills) and non-technical skills (e.g., working norms, behavior changes); and
  - Sustained programming over time: Conducting high-dosage programs and routine follow-ups between program administrators and participants.

Reduce silos across funders and practitioners to improve coordination and achieve cross-sector impact.

Prioritize equity in decision-making to ensure funding and interventions reach Americans poised to benefit most from upward mobility out of poverty.

Prioritize measuring both the impact of funded interventions on economic mobility and beneficiary interest in and satisfaction with those interventions, to ensure beneficiaries' stated needs guide funding decisions.

Research has shown that place — neighborhoods, communities, and cities — has a significant impact on Americans' economic mobility.[23] In particular, local capacity can greatly affect whether localities — like cities and counties — can effectively access critical federal dollars allocated to the Mobility Experiences.

In previous sections, we identified the Mobility Experiences primed for additional investment. Increasing funding alone is not adequate to ensure access to the Mobility Experiences. Localities are not just the recipients of federal and philanthropic investments but also play active roles in determining or influencing whether they can access funding and how it may be best deployed in their place of focus.

A significant share of local capital comes from federal sources. In 2021, 37 percent of local government general revenues, or approximately $740 billion, came from intergovernmental transfers.[24] Many localities are not well positioned to receive investments for the Mobility Experiences, and some are missing out with significant consequences. Research has shown that places with lower capacity may be disadvantaged in accessing federal funds, often receiving fewer federal transportation grants,[25] community development grants,[26] education grants,[27] as well as grants in other sectors.[28]

This section explores how local capacity[i] can affect access to federal and philanthropic funding — and therefore how building local capacity may drive those capital flows. As a case study intended to raise learnings of broad application across the Mobility Experiences, we analyze six local capacities and their impact on Mobility Experiences clustered within the *Community Interactions* domain:[ii] *accessing stable, affordable housing, living in a high mobility neighborhood*, and *having reliable and affordable access to physical and digital infrastructure*, referred to broadly here as housing and community development. For each capacity, we briefly explain each capacity's theoretical relationship to capital access, with a particular focus on federal funding, and, where possible, provide illustrative examples of high-capacity cities that show how these capacities may correlate with funding.

i Although we expect that other factors, including the strength of the local economy, also influence the amount of federal funding flowing to a given city, we focus here on local capacities, broadly conceived as institutional strength, abilities, and priorities, which funders may be able to shape and support.

ii Although we focus on one Mobility Domain here, the first five capacities below are likely relevant to all Mobility Domains, while the sixth—the capacity of the real estate development sector—may be more relevant to housing and community development than Mobility Experiences in other Domains. We hypothesize that the sixth capacity is relevant to the remaining Mobility Domains if it is modified for sector-specific actors (e.g., for Education domain, community colleges are key partners, similar to housing developers for housing outcomes).

Local and Regional Governance Capacity

Local governments with greater administrative and financial capacity are likely to receive more federal funding, particularly competitive grants.

Emerging evidence shows that city and county governments play important roles in coordinating and implementing federal funding. Many federal programs that are critical to Americans realizing the *accessing stable, affordable housing* and *living in a high mobility neighborhood* Mobility Experiences — such as the United States Department of Housing and Urban Development's Community Development Block Grants and the HOME Investment Partnerships program — deliver funds directly to local governments. Similarly, the federal government provides significant funding to local governments through competitive grants. For example, over 70 percent of funds authorized in the Bipartisan Infrastructure Law for local governments were competitive opportunities.[29]

Research suggests that local governments with greater administrative capacity are more likely to receive federal funding, particularly for competitive grants.[30,31] The financial capacity of local governments can also affect cities' access to federal resources. Many federal competitive grants have "cost sharing" or "matching" requirements where cities need to provide a certain percentage of the overall project budget, which disadvantages cities with lower financial capacities.[32]

POTENTIAL WAYS TO MEASURE LOCAL AND REGIONAL GOVERNANCE CAPACITY

While the financial capacity of cities is more difficult to obtain data on, one way to measure administrative capacity is by looking at the number of full-time employees working on affordable housing and community development initiatives, such as those related to infrastructure access. Comparing Baltimore and Memphis (two similarly sized cities), Baltimore, which had 390 full-time employees in 2023, accessed roughly 50 percent more federal housing and community development dollars than Memphis, which had just 63 employees in the same year.[i,33]

i We measure federal housing and community development funding for each city as the average annual per capita funding received from 2005 to 2018. We include funding to the following programs: United States Department of Housing and Urban Development HOME Investment Partnerships Program, Community Development Block Grant Program, Section 108, Choice Neighborhoods, and HOPE VI Public and Indian Housing and Main Street grants; Low-Income Housing Tax Credit investments; and United States Environmental Protection Agency brownfields and brownfields redevelopment grants.

Strength of the Financial Sector

A strong local or regional financial sector, including a diversity and density of institution types, sizes, and specializations, can amplify and attract federal funds.

Private and mission-driven financial sectors can complement, leverage, and even direct federal development programs. For example, private sector lending and investing significantly exceeds federal funding for housing and community development. With the shift towards public-private partnerships, residential and commercial real estate development depends on private capital and public funds cannot accomplish the work alone.

Evidence seems to indicate that the strength of the local or regional financial sector can influence whether cities receive federal funds, and therefore impact access to the Mobility Experiences within the *Community Interactions* domain. For- and nonprofit lenders and investors supply loans that align with many federal housing and community development programs. However, the presence of banks and credit unions alone is not enough — size and type of institution may also have some effect. For example, banks that participate in certain federally subsidized and guaranteed loan programs (such as SBA 7(a), SBA 504, and USDA loans) directly impact federal flows in the areas they cover.

POTENTIAL WAYS TO MEASURE FINANCIAL SECTOR STRENGTH

While there are many possible ways to measure the strength of a local financial sector, few datasets exist that capture these measures in a standardized way for a large proportion of the country. One possible measure is the presence of community development financial institutions (CDFIs), which are key redistributors of federal grant dollars. Studies have shown that a concentration of CDFIs matters in accessing certain types of federal investment. For instance, research on the impact of catalytic capital — which includes both capital from CDFIs as well as from community and private foundations — found that it played an important role in increasing investment flows in several neighborhoods in Cleveland, Ohio.[34]

Presence and Priorities of Major Employers and Institutions

Major organizations like universities, hospitals, and large companies can help cities attract federal funding by engaging in community and workforce development, leading philanthropic endeavors, and directly receiving funding.

Anchor institutions, such as universities and hospitals, can be critical drivers of local economies. They are often the largest employer in a city or county with substantial property holdings. They invest in workforce development, both to find qualified staff and upskill the communities where they work. They also engage in real estate development and procure goods and services from local businesses, all of which can help drive federal flows.

Fortune 500 companies or other large firms can also be community anchors that attract and drive federal funding. For example, the Bipartisan Infrastructure Law invested more than $7 billion in battery manufacturing plants and roughly $50 billion in the CHIPS and Science Act in support of semiconductor research, development, and manufacturing. Apart from receiving federal funds directly, major employers also provide grants to local nonprofit organizations, which improves the capacity of those nonprofits and makes them better able to compete for federal funds. Research has shown that there is a multi-million dollar benefit to local nonprofits, on average, for every major corporation headquartered locally.[35] This suggests that the presence of major employers and institutions can have both direct and indirect impacts on access to federal funding.

POTENTIAL WAYS TO MEASURE PRESENCE AND PRIORITIES OF MAJOR EMPLOYERS AND INSTITUTIONS

One way of measuring the presence of major employers and institutions is by setting a threshold for institution size, counting the local entities that meet that threshold, and ranking relative to other cities or counties. Measuring the priorities of major employers and institutions is more challenging to operationalize but is an essential analytical component. Although total corporate giving can be measured, data on detailed purpose and geography are harder to come by. Individual initiatives and giving campaigns can be tracked and recorded, such as when employers seek to address local housing needs[36] or give to housing and community development organizations. Qualitative evidence suggests that places with strong corporate engagement in housing and community development, such as Detroit and Chicago, are better able to access federal funding.[37]

Robustness of the Local Service Ecosystem

Community development actors, such as business development organizations and nonprofits, can enhance the flow of federal funds by identifying, proposing, and supporting implementation of projects that meet local needs.

Community development ecosystems consist of diverse, interdependent players working together to strengthen neighborhoods and improve residents' quality of life and these ecosystems are critical in supporting Mobility Experiences in the *Community Interactions* domain. Community-based organizations are hubs for advocacy, social services, and civic engagement, connecting residents with essential resources and support networks. Business development organizations support the local economy by offering small businesses and entrepreneurs financial planning, coaching, and technical assistance. In the housing sector, housing counselors provide invaluable guidance on rentals, mortgages, and tenant rights. Operating nonprofits in housing and community development focus on building, managing, and preserving affordable housing while implementing various community initiatives. Community engagement groups, such as neighborhood associations, advocacy organizations, and citizen advisory boards, also exist to help bridge the gap between these organizations and residents.

The presence of community development actors in a city or county can significantly enhance the flow of federal funds by helping to identify local needs, applying for grants, proposing projects that attract debt or tax credit financing, and ensuring that federal programs are implemented efficiently and reach intended beneficiaries.

POTENTIAL WAYS OF MEASURING LOCAL SERVICE ECOSYSTEM

One way to assess ecosystem strength is by measuring the financial strength of local nonprofit organizations. We did so by calculating total assets and total revenue for operating nonprofits in the housing and community development sector using data reported on IRS 990 forms. Using Cleveland again as an example, we find that operating nonprofits in the city focused on housing and community development rank 4th in total per capita assets and 2nd in total per capita revenue among the largest 100 cities.[38] Cleveland also stands out for its high federal funding levels, ranking 6th per capita out of the largest 100 cities, which is suggestive of a relationship between the robustness of the local community development ecosystem and access to federal funding.[39]

Scale and Focus of Philanthropy

Philanthropic institutions both directly and indirectly influence local access to federal funding by providing complementary project financing, supporting the capacity of local nonprofits, and coordinating local stakeholders.

Philanthropies consist of several types of entities, including community foundations and private foundations, as well as family foundations, family offices, and other high net worth giving. Philanthropic organizations can influence federal flows both directly and indirectly. For example, philanthropic institutions can attract, catalyze, and leverage federal flows through the provision of project level financing – such as through program related investments and mission related investments, loan guarantees, loan loss reserves, equity infusions, or other support. Foundations have also paid for consultants to help local actors access more federal financing. The Abell Foundation, Blank Foundation, and Kauffman Foundation helped Baltimore, Atlanta, and Kansas City, respectively, attract Opportunity Zone investment.[40]

More indirectly, these organizations play a vital role in supporting the operations of local nonprofits as well as community development and civic engagement initiatives. Their support better positions these organizations to access federal funding. Finally, beyond funding, local foundations also play important convening, alignment, and coordination roles.

POTENTIAL WAYS OF MEASURING SCALE AND FOCUS OF PHILANTHROPY

In looking at philanthropic giving data, we can measure how much philanthropic investment is being made to certain cities. We analyzed philanthropic giving data from the largest 1,000 foundations in the United States and found that Atlanta, Oakland, Washington, DC, and Detroit were the four cities that received the most per-capita philanthropic funding towards housing and community development in 2019 and 2022.[i] All four cities also rank in the top third of the largest 100 cities in terms of per-capita federal housing and community development funding, suggesting that communities with robust cultures of giving and well-endowed foundations are more likely to have the infrastructure and expertise to secure and manage federal grants and subsidies.

i We filtered data from Candid's Foundation 1000 dataset, to include only grant recipients whose core activities were categorized under housing and community development. We then calculated the total amount of funding received by these organizations across both available years (2019 and 2022), divided this by each city's population to derive the per capita funding amount, and then ranked the 100 largest cities in the United States based on the per capita metric.

Capacity of the Real Estate Development Sector

A robust local real estate development ecosystem can help cities attract federal funding by providing support needed to develop successful affordable housing and community development projects.

The real estate development sector includes local and regional for-profit and nonprofit housing developers who build or rehabilitate affordable and market-rate housing. It also includes commercial and industrial real estate developers, as well as supporting professions like appraisers, architects, accountants, and lawyers. Although some cities do engage in real estate development themselves, often they set up quasi-public redevelopment authorities to do so, such as land banks or community development corporations. Collectively, strength in these areas enables cities to effectively acquire, develop, and revitalize commercial and residential spaces, complete community development projects, and promote access to the *accessing stable, affordable housing* and *living in a high mobility neighborhood* Mobility Experiences.

Cities with high real estate development capacity likely attract more federal funding because of their preparedness to effectively and quickly deploy funding to complete housing and community development projects, their perceived ability to pay off loans,[41] and their track record of delivering project outcomes. A large number of affordable housing developers may additionally signify a thriving economic state with more local tax revenue and resources[42] or a city with more inclusive zoning reforms, where community development projects are more feasible.[43]

POTENTIAL WAYS OF MEASURING CAPACITY OF REAL ESTATE DEVELOPMENT SECTOR

One way of measuring the capacity of the real estate development sector is looking at the availability of real estate actors and their ability to see through significant investments and projects. In looking at Cincinnati, Ohio, we found that the city has a strong network of real estate developers and supporting entities, including The Port, a redevelopment authority. Similarly, Cincinnati has been widely recognized for its success in attracting federal investment. The city's most prominent large-scale and long-term land development and revitalization work has been in the Over-the-Rhine neighborhood, which has succeeded in attracting significant New Markets Tax Credit and Historic Tax Credit investment, among other sources.[44] This suggests that a robust real estate development sector may be integral to accessing and attracting federal capital.

5 Conclusion

Reversing the trend of declining economic mobility requires funders and practitioners to channel greater, and more effective, capital to the Mobility Experiences. While over $6 trillion annually goes towards the Mobility Experiences, there are clear opportunities for federal and philanthropic dollars to be more targeted and impactful.

Understanding the roles that federal and philanthropic funding can play in addressing economic mobility is a first step to making funding more effective. This report reveals both strengths and gaps in current funding. In order to increase economic mobility, funders should:

1. Shift funds towards the Mobility Experiences that both drive higher lifetime income and align with demand;
2. Prioritize policies and programs that can most effectively address the needs of Americans; and
3. Build up local capacity so that funding can be effectively accessed in the places that need it most.

Achieving economic mobility for Americans also requires a more integrated approach that leverages the strengths of both federal and philanthropic funding. In the coming years, more research will be needed to understand how trends in funding to the Mobility Experiences are changing over time and whether funding streams are functioning symbiotically to improve economic mobility in the United States.

Appendices

Technical Appendix

Our research examines the flow of federal and philanthropic capital into the 28 Mobility Experiences and seeks to answer three key questions:

1. How much United States federal and philanthropic funding is deployed to each Mobility Experience and are there patterns in those funding flows?
2. How can we improve the flow of federal and philanthropic funding to the Mobility Experiences?
3. How can we make federal and philanthropic funding to the Mobility Experiences more effective and accessible at the local level?

Federal Funding Approach

The federal funding analysis captures two types of federal expenditures: budget authority and tax expenditures.

Budget authority is the amount of money that federal agencies are authorized to spend for specific purposes in a given fiscal year (beginning on October 1 and ending on September 30 of the next year), while tax expenditures are "revenue losses attributable to Federal tax laws which allow a special exclusion, exemption, or deduction from gross income, or which provide a special credit, a preferential rate of tax, or a deferral of tax liability."[45] We include tax expenditures because they are often viewed as alternatives to other federal policy instruments, such as spending or regulatory programs.

We use the Office of Management and Budget's public budget database to measure budget authority and the Department of the Treasury's estimates to measure tax expenditures. In both cases, we limit our analyses to fiscal years 2019 (October 1, 2018 to September 30, 2019) and 2023 (October 1, 2022 to September 30, 2023). Broadly speaking, the budget authority data is organized by agency, budget account, and subfunction, while the tax expenditures data is organized by tax provision or program.

We filtered the federal budget authority data ahead of tagging to improve the feasibility and replicability of this exercise. The research team developed detailed guidelines both to filter out irrelevant rows and to reduce subjectivity in tagging and enable replication of this data collection and analysis in the future.

DATA FILTERING GUIDELINES INCLUDE THE FOLLOWING:

- Rows with negative or zero budget authority in both FY2019 or FY2023 were excluded;
  - Rows where one year has positive budget authority and the other year has negative or zero budget authority were included in tagging, but budget authority was set to missing for the year where it was negative or zero account.
- Rows identified as "net interest" in the Budget Enforcement Act (BEA) category column were excluded, as we are interested in expenditures rather than revenue. We also aggregated the remaining two BEA categories ("mandatory" and "discretionary");
- Administrative accounts, including salaries and expenses, government employee benefits, and other operational costs, were not included. This includes expenses and benefits related to active military personnel;[i] and
- Research-related accounts, except when directly related to intervention implementation or improvement, were not included.

For both datasets, we tagged the remaining rows to a primary Mobility Experience, and a secondary one, if applicable. For the purposes of the funding flow analyses in this report, only the primary experience was used.

i While this research does not include benefits to military personnel in calculations of total federal funding flowing to the mobility experiences, entering the military in the United States provides an important path to economic mobility for many Americans. The military can have a significant impact on an individual's access to key economic mobility levers like education, skills training, affordable housing, and healthcare. This research does include funding for veterans because this funding represents a significant portion of America's social safety net.

The following table illustrates the types of programs tagged to each Mobility Experience.

Mobility Domains	Mobility Experiences	Types of programs included
Career Progression	Avoiding involuntary unemployment	Job protection; workplace safety; labor relations
	Obtaining a first full-time job that offers an opportunity for advancement	Job quality and pay improvement programs
	Receiving job or skills training	Workforce development; vocational training programs
Financial Well-being	Accessing non-wage employment-based benefits (including healthcare, retirement)	Support for employer-sponsored retirement and healthcare; does not include government pensions
	Accessing public benefits and programs	Social security; unemployment insurance; Supplemental Nutrition Assistance Program
	Experiencing financial inclusion (including financial education and access)	Individual access to credit and banking; financial literacy programs
	Having manageable student debt	Student debt forgiveness
	Owning a business[i]	Small and disadvantaged business loans; tax incentive programs; technical assistance programs
Community Interactions	Accessing stable, affordable housing	Public housing; voucher-assisted housing; rent support; downpayment and loan assistance; mortgages and mortgage-backed securities; healthy housing and safety improvements
	Avoiding interactions with the criminal justice system	Crime prevention; restorative justice; criminal justice involvement prevention
	Living in a high mobility neighborhood	Neighborhood and community development outside of infrastructure programs (see below); community development financial institutions (CDFIs)
	Having reliable and affordable access to physical and digital infrastructure (including transit and internet)	Internet/digital access; transit development and improvement including roads and highways, public transit, and passenger trains and ferries (not including airports or freight transit)

i In this research, funding to support small businesses is classified as impacting the mobility experience “owning a business.” The federal government sets procurement goals for contracting with small businesses, called “set aside” contracts. Guidance on when to purchase goods or services from a small business depends on the size of the contract. Because small business set-asides are dispersed across federal accounts, it was not feasible to separate out total federal spending flowing towards small businesses in this report. Future research could examine the impact of federal dollars on entrepreneurship and small business outcomes.

Mobility Domains	Mobility Experiences	Types of programs included
Physical and Mental Health	Accessing care for mental and physical health conditions	Insurance, including Medicaid and Medicare; programs to support provider availability and access to services
	Accessing pre-and post-natal care	Maternal health programs
	Being born with a healthy birth weight	Maternal health programs with explicit goal of improving birth weight
	Having access to adequate nutrition and a balanced diet in childhood	School nutrition; Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
	Having low exposure to traumatic experiences (including ACEs)	Prevention of abuse, violence, and discrimination (experience-specific discrimination prevention, such as fair housing, will fall under the specific experience); promotion of community safety; Child Protective Services
Education	Accessing extracurriculars during adolescence (including sports, clubs, work)	Support students to access afterschool programming
	Accessing pre-K and other early childhood development opportunities	Early childhood development and education programs
	Avoiding repeated school disciplinary actions	Teacher training; school-related conflict resolution; student support programs
	Completing high school education	Funding for secondary education access and quality improvement
	Graduating with a degree in a high-paying field of study	Support for exposure to and experience in high-paying sectors, such as science, technology, engineering and math (STEM)
	Pursuing/completing postsecondary education	Scholarship and grant programs; public university and community college funding
Social and Familial Relationships	Having strong social and professional networks	Professional associations; mentorship in adulthood
	Living with a working adult partner (including cohabitation, marriage)	Unlikely to align with federal programming; could include specific supports to ensure adults in households with at least two people of working age have access to income generating opportunities
	Not having to provide unpaid care for adult family members	In-home and elder care programs; tax credits and insurance programs for dependents or people with disabilities
	Not having to provide unpaid care for children	Child tax credit; childcare affordability programs
	Receiving mentorship during adolescence	Adolescent-specific mentorship programs, e.g., Big Brother, Big Sister

Philanthropic Funding Approach

The philanthropic funding analysis uses the Candid Foundation 1000 dataset, which compiles all grants given by the top 1,000 foundations in the United States for calendar years 2019 and 2022.

The data for 2023 was not available at the time of this analysis. The Candid Foundation 1000 dataset was filtered for purchase according to the following guidelines:

- Grants above $10,000, which is the minimum grant amount included in the dataset;
- Grants intended to be spent within the United States; and
- Grants with a subject area relevant to the Mobility Experiences (see below for more details on subject area mapping).

Ahead of tagging individual grants, each of Candid's philanthropic subject areas, which are codes used in the Philanthropy Classification System (PCS), was tagged to one of the three categories below:

- The subject areas with clear ties to specific Mobility Experiences were tagged accordingly. The grants falling under these subject areas were purchased from Candid;
- The subject areas with potential links to specific Mobility Experiences but where grants could or could not be relevant (e.g., Human Rights subject area) were tagged as "More information needed." The grants falling under these subject areas were purchased from Candid; or
- The subject areas that were not relevant to any of the Mobility Experiences were tagged as "Not relevant." The grants falling under these subject areas were excluded from the dataset that was purchased from Candid.

The final purchased dataset included nearly 100,000 grants and $25 billion in philanthropic funding. The research team developed a hybrid automated-manual tagging methodology to assign each relevant grant to a primary Mobility Experience.

The top one percent of rows, representing 45 percent of total funding, were reviewed and tagged manually to ensure accuracy. The remaining grants were automatically tagged using the mapping of PCS categories to the Mobility Experiences.

The Foundation 1000 dataset tags each grant with all relevant PCS categories. Because the PCS categories are mapped to the Mobility Experiences, this means that each grant is automatically tagged to multiple Mobility Experiences. In order to prevent double counting funding for different Mobility Experiences, we assigned a single primary Mobility Experience to each grant. To achieve this, we used the most frequently occurring Mobility Experience tag for each grant as the primary tag.

For grants that have Mobility Experience tags that occur in the same frequency (for example, a grant with two tags such as "completing high school education" and "receiving mentorship in adolescence"), we took a tiered approach:

1. If the grant amount was equal to or exceeded $750,000, the team reviewed and tagged the grant manually. This grant threshold was selected for feasibility. The research team manually tagged approximately 1,000 grants using this approach; and
2. If the grant was less than $750,000, the grant was tagged as "General Economic Mobility." This means the grant is presumed to be related to the Mobility Experiences, but the research team is unable to assign it to a specific Mobility Experience. These account for approximately seven percent of the dataset, or $1.8 billion.

For grants with a single Mobility Experience tag, the research team used the following approach:

1. If the tag was one of the 28 Mobility Experiences, that tag was used as the final primary Mobility Experience assignment for that grant;
2. If the tag was "General Economic Mobility" and the grant was larger than $25,000, the research team manually reviewed and tagged the grant to a primary Mobility Experience, if possible; and
3. If the tag was "General Economic Mobility" and the grant was equal to or smaller than $25,000, the research team kept the existing tag. These account for approximately 0.1 percent of the dataset, or $17.3 million.

Given the size of the dataset, it was not feasible for the research team to manually tag all grants for which a primary Mobility Experience was unclear based on the available data.

ERROR RATE

The philanthropic funding tagging methodology results in an estimated error rate of eight percent. This means that eight percent of funding, or $2 billion, may be tagged to an incorrect Mobility Experience or incorrectly tagged as unrelated to a Mobility Experience. This error rate is a result of 1) inaccuracies in the Foundation 1000 PCS categorization of the grants and 2) using the modal Mobility Experience tag as the primary Mobility Experience, which may inaccurately represent the grant.

Interventions Analysis Approach

To identify common features of effective interventions and programs, we selected a subset of 13 Mobility Experiences for which we assessed existing interventions.

The selection of Mobility Experiences for intervention analysis was based on multiple criteria, including the experience's relative impact on economic mobility, the reported demand for support as identified in our survey of 4,000 Americans, and data availability.[i, ii]

Across the different Mobility Experiences, we examined more than 200 scientific research papers and evaluations covering specific interventions. Evaluations selected for examination met two core criteria:

- Evaluations that assessed the impact of US-based programs via methods including, among others: randomized controlled trials, regression analysis, quasi-experimental analysis, cohort-level random assignment, and natural experiments; and
- Evaluations of programs whose target population included individuals with incomes within 200 percent of the federal poverty level (FPL), low-wage workers, or other at-risk populations.

To supplement our academic evidence base of over 200 evaluations, we conducted an additional review of popular literature from leading philanthropies, corporate institutions, and think tanks that examined the impact of economic mobility interventions.

Using the academic evidence collected, alongside supplemental popular literature, our research sought to understand the key drivers of impact for an intervention. We sought to identify common features of interventions that are associated with improved outcomes for participants.

Findings were ultimately structured into ten topic areas that cover interventions for a distinct Mobility Experience or a set of related Mobility Experiences. When interventions for a set of Mobility Experiences were similar (as with programs that address "involuntary unemployment" and "reskilling"), findings were combined into a single theme.

i "Impact" refers to the degree (by percentage) in which a person's lifetime income changes during and after a mobility experience, based on a review of scientific literature.

ii "Demand for support" refers to the expressed interest in receiving support to access a Mobility Experience, based on the percentage of survey respondents who indicated interest.

Exhibit T.1 Mobility Experiences selected for interventions analysis

CIRCUMSTANCES AT BIRTH & EARLY CHILDHOOD

- Accessing pre- and post-natal care
- Being born with a healthy birthweight
- **Accessing pre-K and other early childhood development opportunities**
- Having access to adequate nutrition and balanced diet in childhood

ADOLESCENCE & EARLY ADULTHOOD

- Not experiencing repeated school disciplinary actions
- Accessing extracurriculars during adolescence (including sports, clubs, work)
- Completing high school education
- **Graduating with a degree in a high-paying field of study**
- **Pursuing/completing post-secondary education**
- Having student debt
- **Receiving mentorship during adolescence**
- **Receiving jobs or skills training**
- **Obtaining a first full-time job with opportunity for advancement**
- **Accessing non-wage employment-based benefits**

ADULTHOOD

- Owning a business
- Living with a working adult partner (including marriage & cohabitation)
- **Not experiencing involuntary unemployment**
- Not having to provide unpaid care for children
- Not providing unpaid care for family adult members

CROSS-CUTTING

- **Living in a high-mobility neighborhood**
- Accessing public benefits & programs
- Accessing stable, affordable housing
- **Having low exposure to traumatic experiences (including ACEs)**
- Accessing care for mental and physical health conditions
- Having reliable and affordable access to physical and digtial infrastructure (including transit and internet)
- **Not having interactions with the criminal justice system**
- Having strong social and professional networks
- **Experiencing financial inclusion (including financial education and access)**

Bold = Selected experiences for interventions analysis

Exhibit T.2 Mobility Experiences selected for interventions analysis

Mobility Experience	Number of program evaluations studied
Accessing non-wage employment-based benefits including healthcare, retirement	16
Accessing pre-K and other early childhood development opportunities	21
Employment and workforce development: • Not experiencing involuntary unemployment • Obtaining a first full-time job with opportunity for advancement • Receiving jobs or skills training	30
Experiencing financial inclusion (including financial education and access)	16
Graduating with a degree in a high-paying field of study	24
Having low exposure to traumatic experiences (including ACEs)	16
Living in a high-mobility neighborhood	12
Not having interactions with the criminal justice system	49
Pursuing/completing post-secondary education	19
Receiving mentorship during adolescence	16

Appendix A. Federal Funding Flows to the Mobility Experiences

In fiscal year 2023, 69 percent of the total federal funding that we analyzed, or over $6 trillion, flowed to programs with the potential to support economic mobility through the Mobility Experiences. The proportion of total funding flowing to the Mobility Experiences was very similar in fiscal year 2019, even though overall federal spending was lower that year.

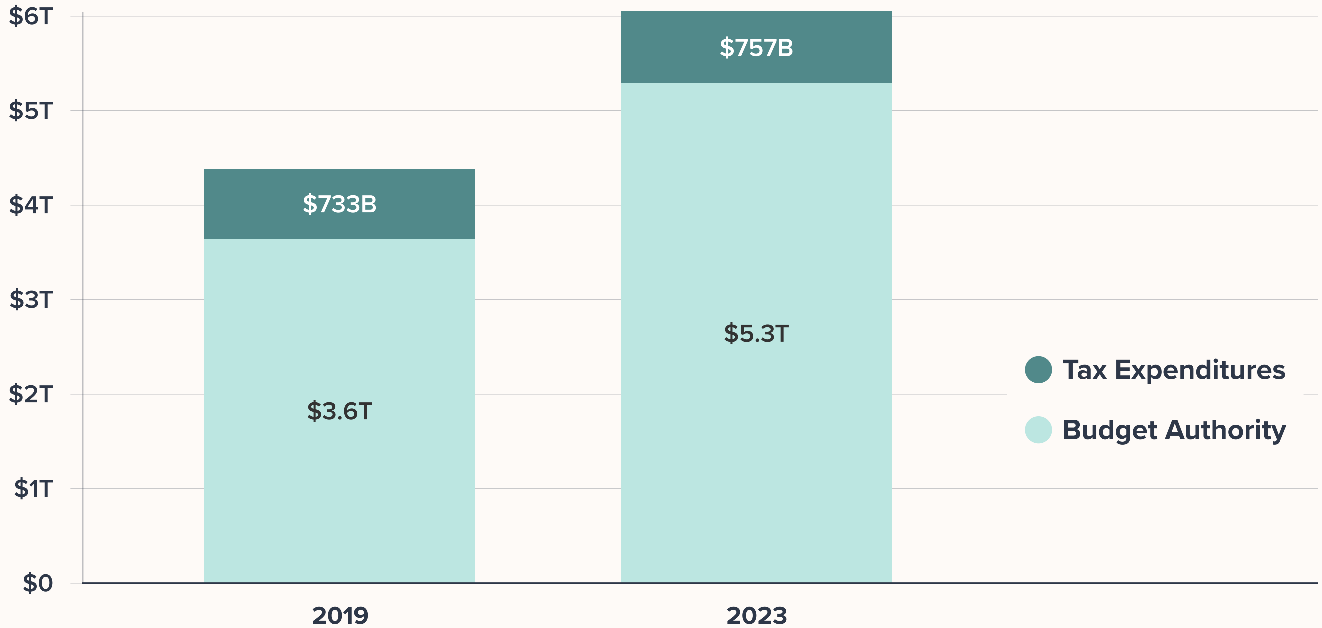
Of the federal funds supporting economic mobility in 2023, 87.5 percent (or $5.3 trillion) came from direct authorized spending through the federal budget, with the remaining $757 billion coming from estimated tax expenditures, which represent foregone revenues for the federal government (Exhibit A.1).

Exhibit A.2 illustrates the amount of federal funding flowing to each Mobility Domain in 2023. The *Financial Well-being* domain captured a plurality of federal funding to the Mobility Experiences at 47.8 percent, followed closely by the Physical and Mental Health domain at 43.3 percent, with the remaining four domains trailing far behind. Funding to "General Economic Mobility" (not shown in Exhibit A.2) comprised just 0.1 percent of total federal funding and represents funding to programs that have potential relevance to multiple Mobility Experiences or domains.

Looking at individual Mobility Experiences, just three of the 28 Mobility Experiences accounted for more than 85 percent of total federal funding to economic mobility in 2023*: accessing care for mental and physical health conditions* ($2.6 trillion*), accessing public benefits and programs* ($2.0 trillion), and *accessing non-wage employment-based benefits* ($573 billion).

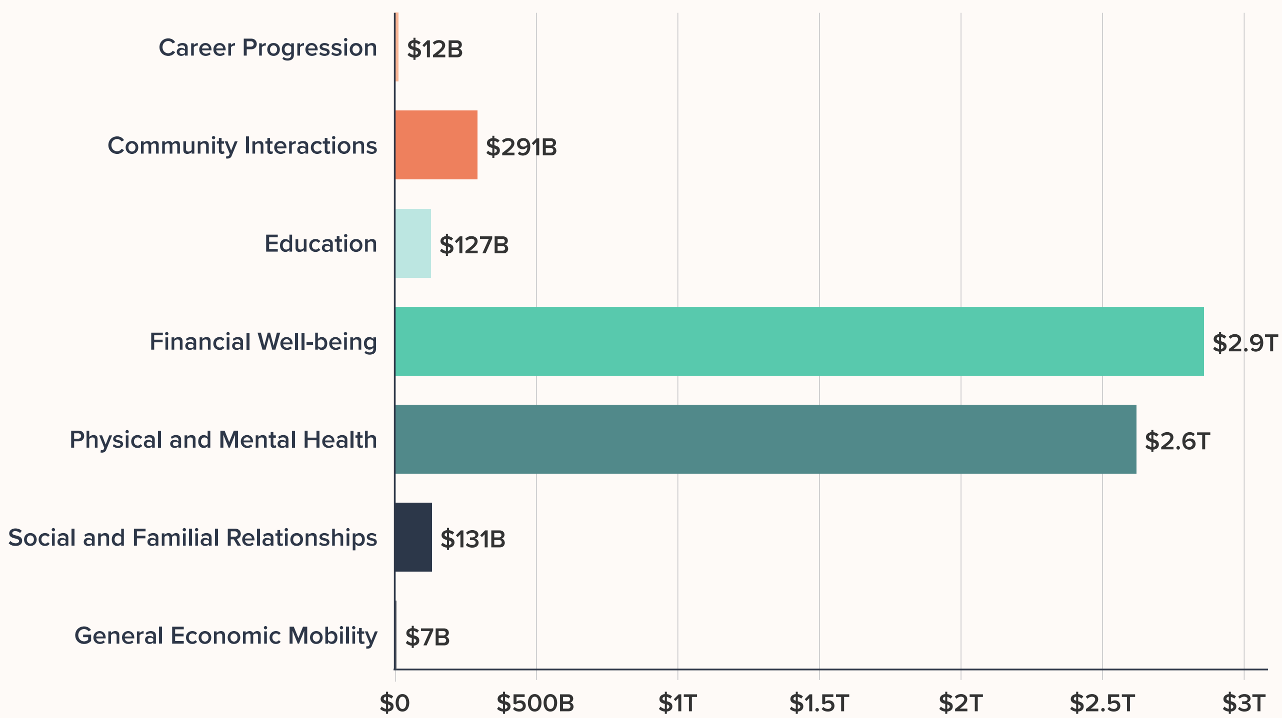
Although spending on these three Mobility Experiences dwarfs the others, the federal government also invests significant funds—more than $100 billion each in 2023—into four other experiences: *having manageable student debt* ($161 billion); *having reliable and affordable access to physical and digital infrastructure* ($126 billion); *not having to provide unpaid care for children* ($122 billion); and *accessing stable, affordable housing* ($112 billion).

Exhibit A.1 Federal funding flows to economic mobility, FY2019 and FY2023



Source: Office of Management and Budget; U.S. Department of the Treasury

Exhibit A.2 Federal funding flows by Mobility Domain, FY2023

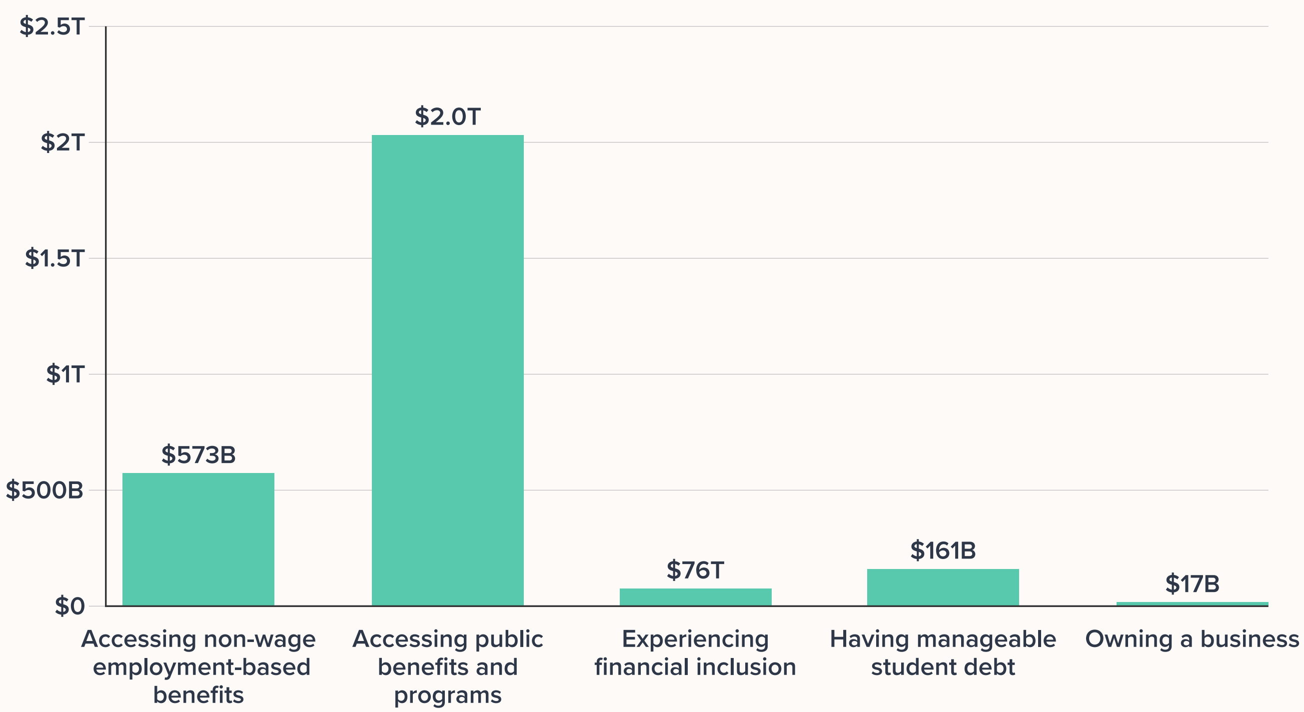


Source: Office of Management and Budget; U.S. Department of the Treasury

Financial Well-being

As noted earlier, 47.8 percent of total federal funding to the Mobility Experiences (or $2.9 trillion) went to experiences within the *Financial Well-being* domain in 2023. The *accessing public benefits and programs* experience captured 71.1 percent of this funding, driven primarily by funding for Social Security and other safety net programs, such as the Supplemental Nutrition Assistance Program (Exhibit A.3). Another 20 percent of funding to this domain was captured by the *accessing non-wage employment-based benefits* experience. The majority of federal funding to this Mobility Experience comes from the exclusion of contributions to employer-sponsored retirement vehicles (and investment income on these contributions) from individual and corporate taxes and the exclusion of employer contributions towards medical care and insurance premiums from employees' gross incomes. While the *owning a business* experience seems to capture a relatively small amount of federal funding, our analysis does not capture small business set-asides (as noted in the Technical Appendix), and as such may be understating federal funding to this Mobility Experience.

Exhibit A.3 Federal funding flows to Mobility Experiences in the *Financial Well-being* domain, FY2023

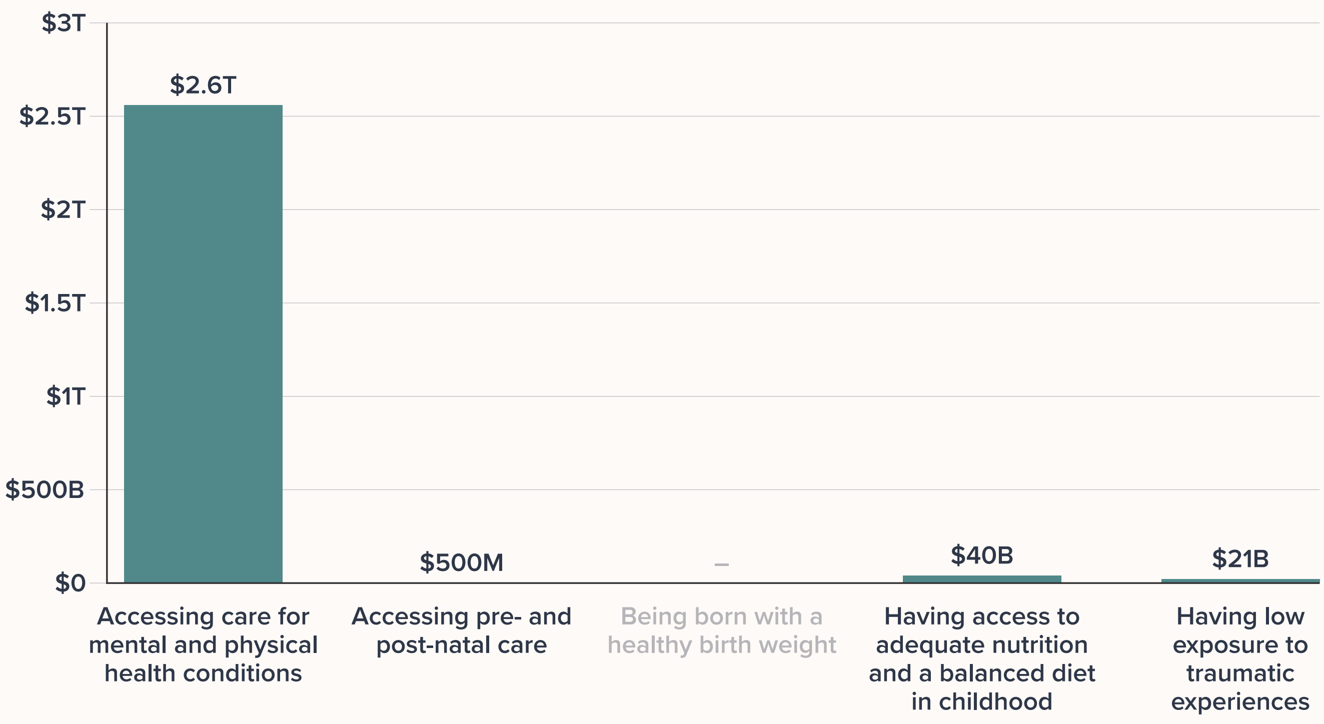


Source: Office of Management and Budget; U.S. Department of the Treasury

Physical and Mental Health

The *Physical and Mental Health* domain captured 43.3 percent of total federal funding to the Mobility Experiences in 2023. As might be expected, funding to this Mobility Domain is driven primarily by funding to Medicare and Medicaid, which is categorized under experience of *accessing care for mental and physical health conditions*. The *accessing care* experience captured $2.56 trillion in federal funding in 2023, or 97.7 percent of total funding to this domain. Because pre- and post-natal care (which also contributes to babies being born with a healthy birth weight) is likely also provided by programs counted under the more general *accessing care* experience, our analysis likely understates the amount of funding to the experiences of *accessing pre- and post-natal care* and *being born with a healthy birth weight*.

Exhibit A.4 Federal funding flows to Mobility Experiences in the *Physical and Mental Health* domain, FY2023



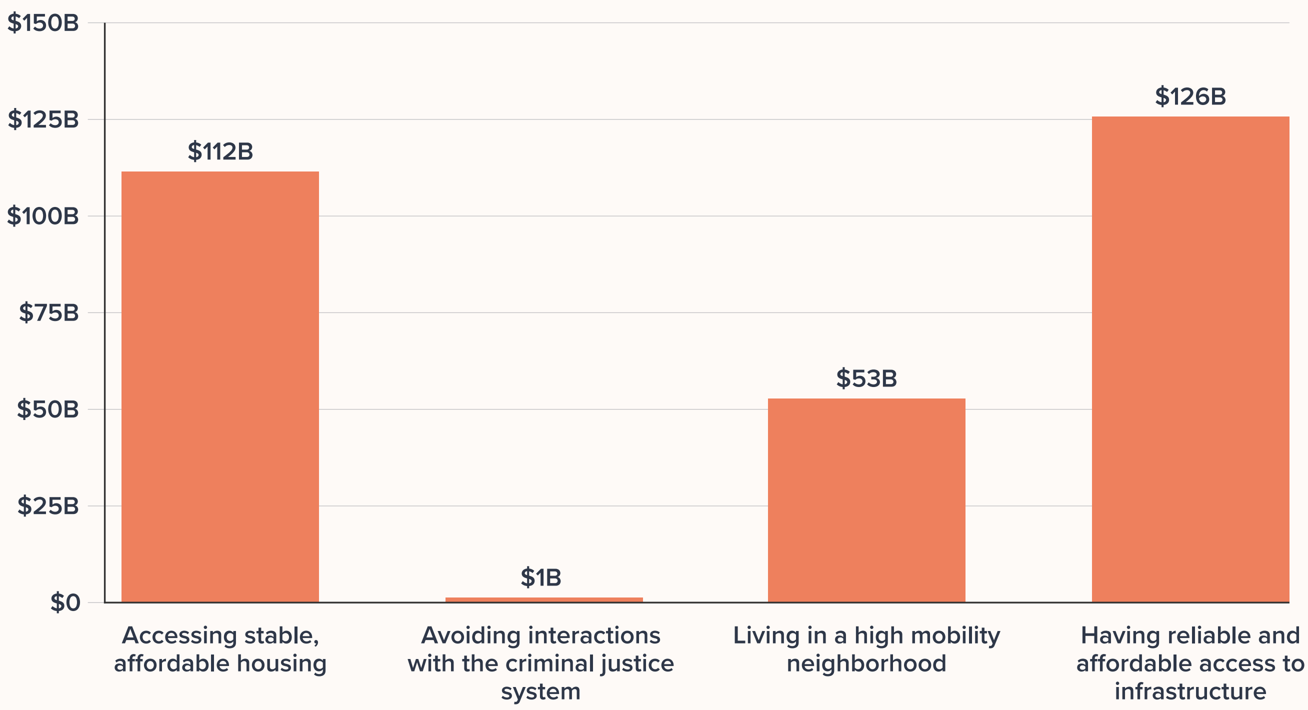
Source: Office of Management and Budget; U.S. Department of the Treasury

Community Interactions

Our estimates suggest that the federal government spent $291 billion, or 4.8 percent of its total funding to the Mobility Experiences within the *Community Interactions* domain in 2023. The experiences of *having reliable and affordable access to physical and digital infrastructure* and *accessing stable, affordable housing* captured the majority of funding at 43.2 and 38.3 percent respectively.

Our analysis captured very little funding ($1.3 billion) flowing to the *avoiding interactions with the criminal justice system* experience. The majority of justice-related federal funding supports law enforcement and punitive measures rather than crime prevention.

Exhibit A.5 Federal funding flows to Mobility Experiences in the *Community Interactions* domain, FY2023



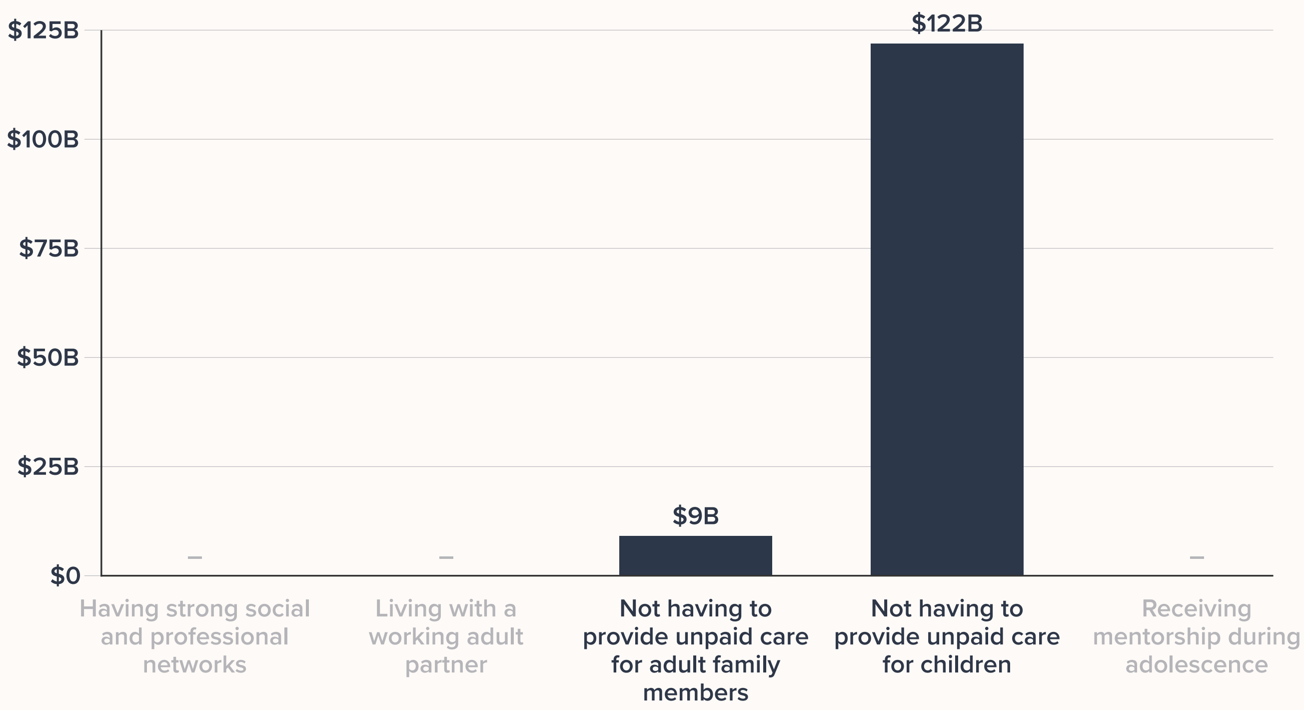
Source: Office of Management and Budget; U.S. Department of the Treasury

Social and Familial Relationships

Within the *Social and Familial Relationships* domain, funding to *not having to provide unpaid care for children* captured the vast majority (93.1 percent) of funding, driven largely by the Child Tax Credit. Although the Child Tax Credit can be used for any expenses, not just childcare, we classify it under the *not having to provide unpaid care for children* experience, as the most relevant of the Mobility Experiences.

Three experiences in this domain received no federal funding at all: *receiving mentorship during adolescence; living with a working adult partner;* and *having strong social and professional networks*. Because social and professional relationships (including living with a working adult partner and having strong networks) may be outside the scope of federal policy interventions, it may be unsurprising that no federal funding flowed to these two experiences in 2023. However, our analysis may underestimate the level of federal support for mentorship in adolescence, as relevant funding may be captured under a different Mobility Experience. For instance, the Department of Justice's Juvenile Justice Programs, which we classify under *avoiding interactions with the criminal justice system*, encompass not only crime prevention initiatives but also youth mentoring initiatives.

Exhibit A.6 Federal funding flows to Mobility Experiences in the *Social and Familial Relationships* domain, FY2023



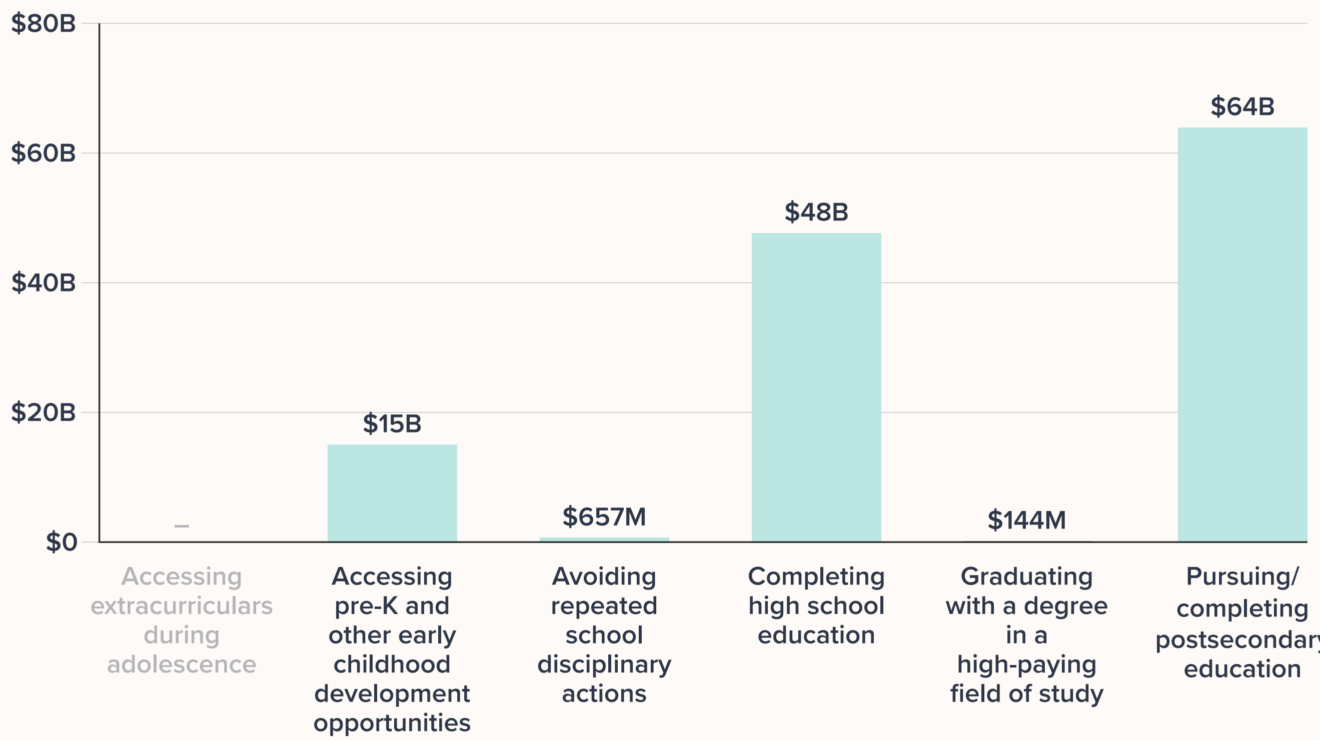
Source: Office of Management and Budget; U.S. Department of the Treasury

Education

Within the *Education* domain, funding to the *pursuing/completing postsecondary education* experience captured 50.2 percent of funding, driven primarily by the Pell Grants program, followed by funding *to completing high school* at 37.4 percent. Funding to the latter experience may also capture funding for elementary and middle school, as some federal programs provide funding to all three. The remaining four experiences—*accessing pre-K and other early childhood development opportunities; avoiding repeated school disciplinary actions; graduating with a degree in a high-paying field of study*; and *accessing extracurriculars during adolescence*—received comparably little funding, with no funding at all flowing to *accessing extracurriculars* in 2023.

However, federal funding alone does not capture the full picture of public spending on education—the federal government has traditionally provided only a small fraction of funding for elementary and secondary education, with approximately 89 percent of funding coming from state and local governments in 2021.[46] In addition, it is possible that funding for some of these experiences is being captured by other related Mobility Experiences—for instance, funding for formal education may also support extracurriculars. As a result, our analyses of federal funding in this domain may understate the true amount of capital flowing to each Mobility Experience.

Exhibit A.7 Federal funding flows to Mobility Experiences in the *Education* domain, FY2023

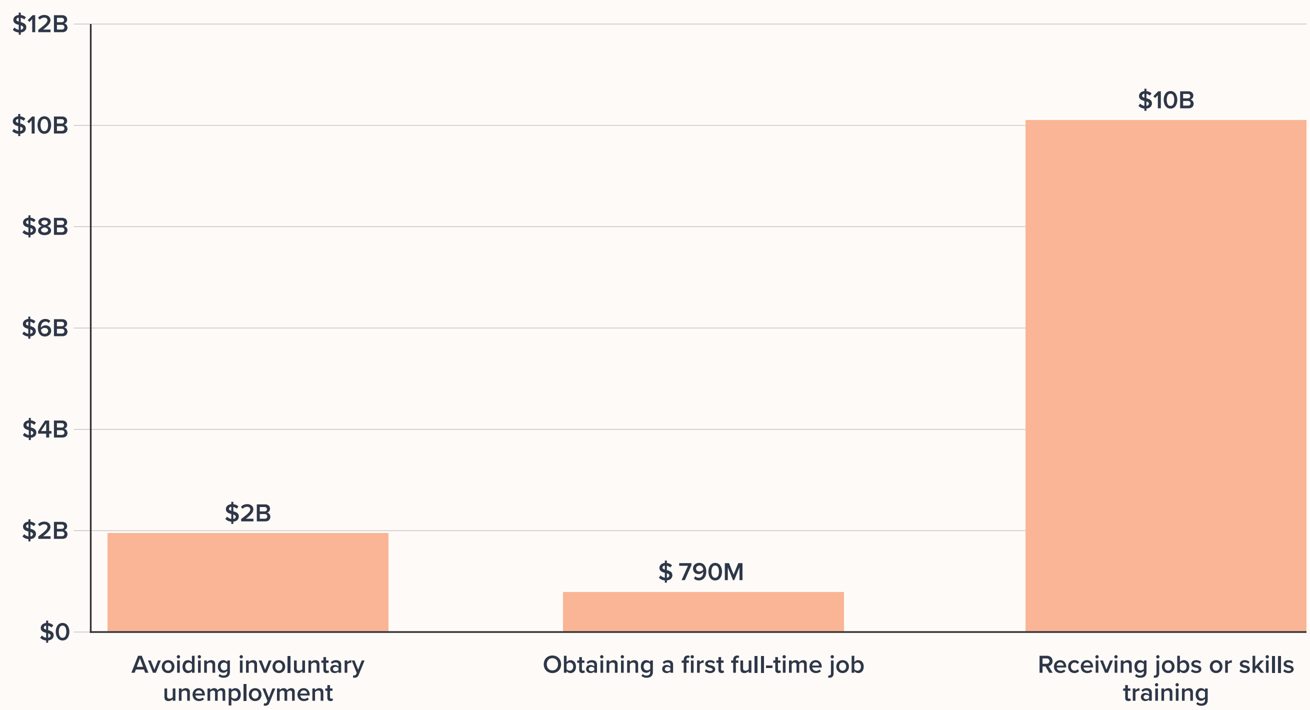


Source: Office of Management and Budget; U.S. Department of the Treasury

Career Progression

Within the final domain, *Career Progression*, the majority of federal funding (78.7 percent) is captured by *receiving jobs or skills training*, most of which stems from programs run by the Department of Labor. The remaining two Mobility Experiences—*avoiding involuntary unemployment* and *obtaining a first full-time job that offers an opportunity for advancement*—account for less than $3 billion in federal funding in 2023, though it is possible that programs funding jobs or skills training may also support these two experiences.

Exhibit A.8 Federal funding flows to Mobility Experiences in the *Career Progression* domain, FY2023



Source: Office of Management and Budget; U.S. Department of the Treasury

Appendix B. Philanthropic Funding Flows to the Mobility Experiences

In calendar year 2022, less than 20 percent of the philanthropic funding that we analyzed[i] flowed to programs related to the Mobility Experiences in the United States. The amount of total funding flowing to the Mobility Experiences fell in both absolute and relative terms, from $10.9 billion in 2019, or nearly 36 percent of philanthropic funding analyzed in that year, to $8.4 billion in 2022 (Exhibit B.1).

Of the philanthropic funds supporting the Mobility Experiences in 2022, nearly 40 percent came from family foundations, compared to nearly 48 percent in 2019. Community foundations contributed slightly over 24 percent (compared to 15.2 percent in 2019) and corporate foundations contributed 3.9 percent (compared to 5.3 percent in 2019). The remaining 32.4 percent came from other "General" foundations,[ii] who contributed a very similar share in 2019.

Exhibit B.2 illustrates the amount of philanthropic funding flowing to each Mobility Domain in 2022. A majority of funding is concentrated in two domains: *Education* and *Physical and Mental Health*. *Education* accounts for 45 percent of total philanthropic funding going towards the Mobility Experiences, while *Physical and Mental Health* accounts for 22 percent. Funding to "General Economic Mobility" accounts for almost 13 percent of total funding and represents funding to programs that are either broadly applicable to the Mobility Experiences or impact multiple experiences such that alignment to a single Mobility Experience is not possible. The remaining four Mobility Domains receive significantly less funding, with none accounting for more than 10 percent of the total.

Looking at individual Mobility Experiences, just four of the 28 Mobility Experiences captured more than half (57 percent) of total philanthropic funding to economic mobility in 2022: *pursuing/completing secondary education* ($2.2 billion), *accessing care for mental and physical health conditions* ($951 million), *completing high-school education* ($946 million) and *having low exposure to traumatic experiences (including ACEs)* ($726 million).

Three experiences received either no or very negligible funding in 2022: *living with a working adult partner* ($0), *having manageable student debt* ($0), and *avoiding repeated school disciplinary actions* ($50,000).

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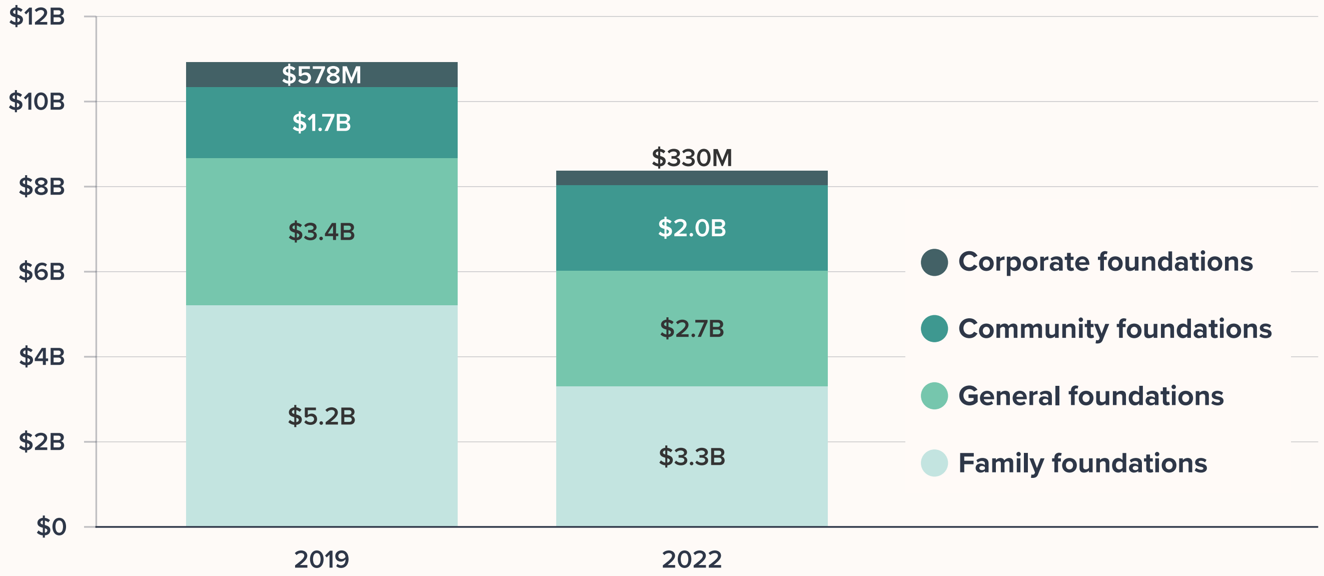
i As noted in the Technical Appendix, our dataset of philanthropic funding is limited to the largest 1,000 philanthropic organizations in the United States.

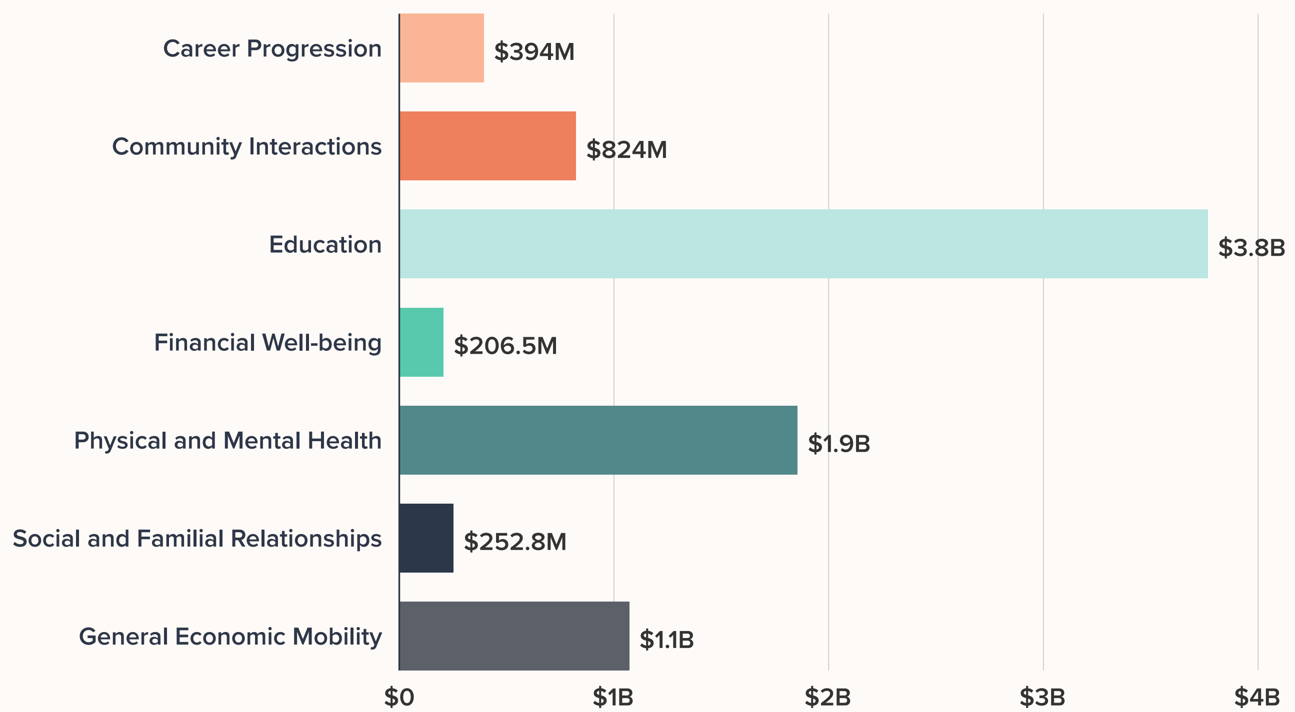
ii General foundations comprise organizations listed in the Foundation 1000 dataset as independent or operating foundations or public charities.

Exhibit B.1 Philanthropic funding flows to economic mobility by foundation type, 2019 and 2022



Source: Candid Foundation 1000

Exhibit B.2 Philanthropic funding flows by Mobility Domain, 2022



Source: Candid Foundation 1000

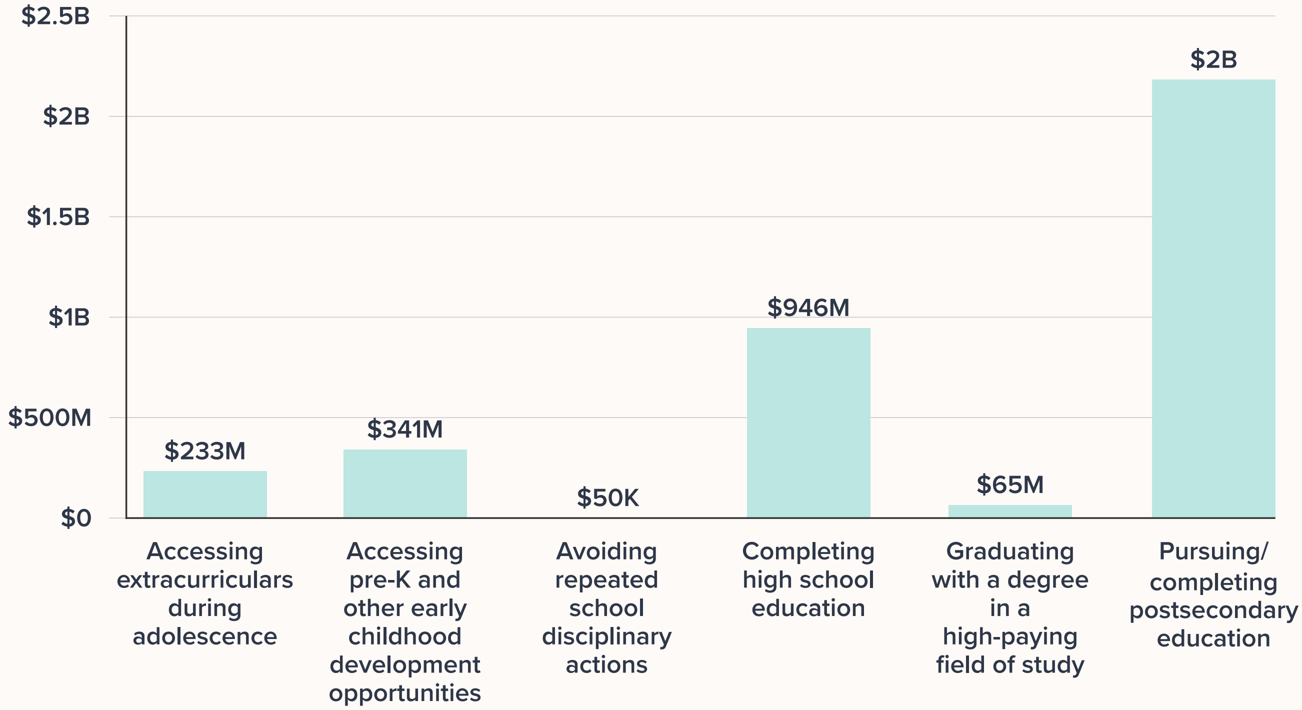
Education

As noted earlier, 45 percent of total philanthropic funding to the Mobility Experiences (or $3.8 billion) went to the *Education* domain in 2022. This represented a 52 percent decrease (adjusted for inflation) from the philanthropic funding that flowed to the *Education* domain in 2019, driven in part by a $1.3 billion one-time donation from the Bloomberg Family Foundation to the Johns Hopkins University endowment. Despite this decline, *Education* continues to be the most well-funded domain.

Of the funding allocated to the *Education* domain, 57.9 percent (or $2.2 billion) was directed towards *pursuing/completing postsecondary education* in 2022 (Exhibit B.3). Most of the large grants directed towards this Mobility Experience focused on infrastructure investments, grants to research centers, and endowment contributions. Funding for scholarships was much smaller in size.

Completing high school education captured another 25.1 percent, or $946 million, of funding to this domain. The majority of grants within this experience focused on providing financial support to school districts and charter schools. The remaining four experiences received comparatively little funding.

Exhibit B.3 Philanthropic funding flows to Mobility Experiences in the *Education* domain, 2022



Source: Candid Foundation 1000

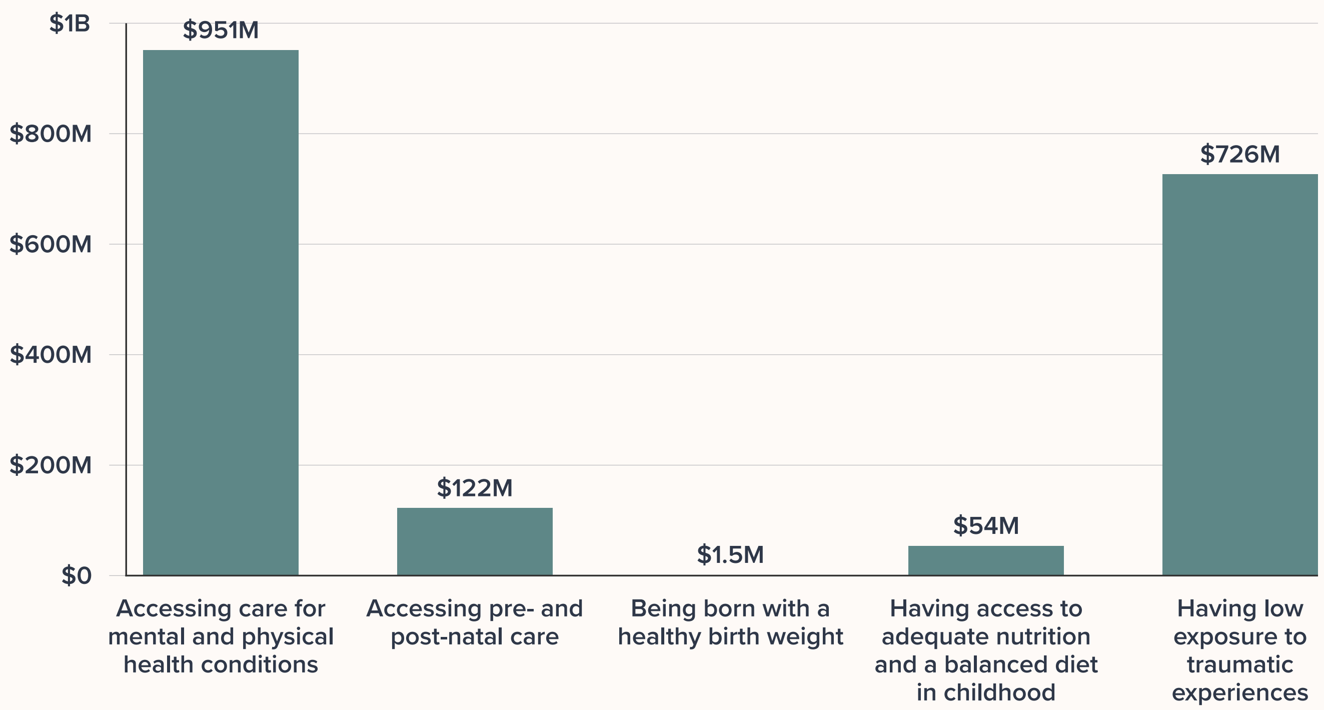
Physical and Mental Health

The *Physical and Mental Health* domain received the second largest share of philanthropic funding, accounting for 22.2 percent of total funding, or $1.8 billion, in 2022.

Accessing care for physical and mental health conditions received 51.2 percent of total funding to this domain (Exhibit B.4). Many grants to this experience focused on strengthening the quality and reach of the United States healthcare system through community-based programs, with a particular focus on health equity for Black families and families with low incomes. A number of large grants also went towards mental health services and reproductive healthcare.

Having low exposure to traumatic experiences (including ACEs) received 39.2 percent of total funding to this domain in 2022. Many philanthropies funded programs related to racial justice and anti-discrimination in this space, as well as programs supporting child welfare, such as through child advocacy services. The remaining three experiences together received less than 10 percent of total funding to this domain.

Exhibit B.4 Philanthropic funding flows to Mobility Experiences in the *Physical and Mental Health* domain, 2022.



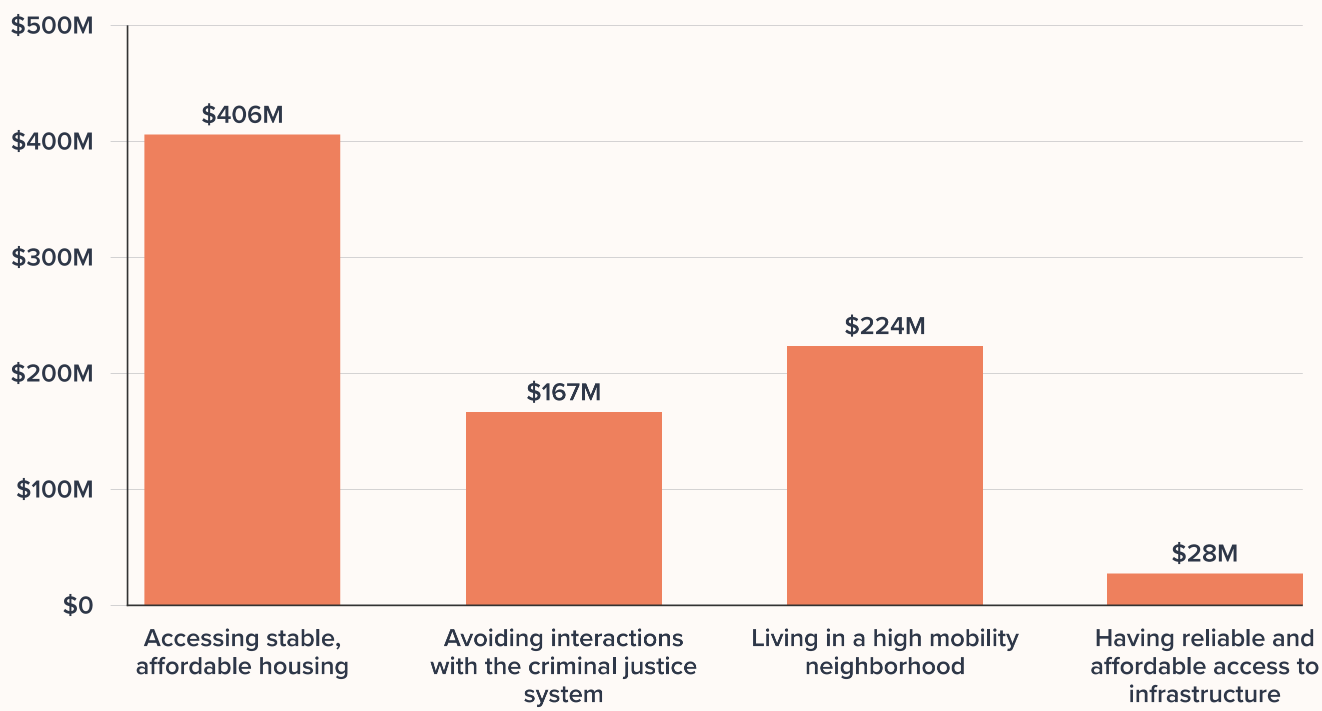
Source: Candid Foundation 1000

Community Interactions

The *Community Interactions* domain accounted for just under 10 percent of total philanthropic funding to the Mobility Experiences in 2022. Within this domain, 49.3 percent of funding went towards *accessing stable and affordable housing*, 27.2 percent towards *living in a high mobility neighborhood*, and 20.2 percent towards *avoiding interactions with the criminal justice system* (Exhibit B.5). *Having reliable and affordable access to physical and digital infrastructure* received just 3.4 percent of funding.

Philanthropic funding for Mobility Experiences in the *Community Interactions* domain stayed nearly equal in value when adjusted for inflation between 2019 and 2023, despite major disruptors between the two years, such as the COVID-19 pandemic which underscored the importance of housing and the impact of structural inequities. This is the only domain in which the value of giving remained the same between the two years.

Exhibit B.5 Philanthropic funding flows to Mobility Experiences in the *Community Interactions* domain, 2022



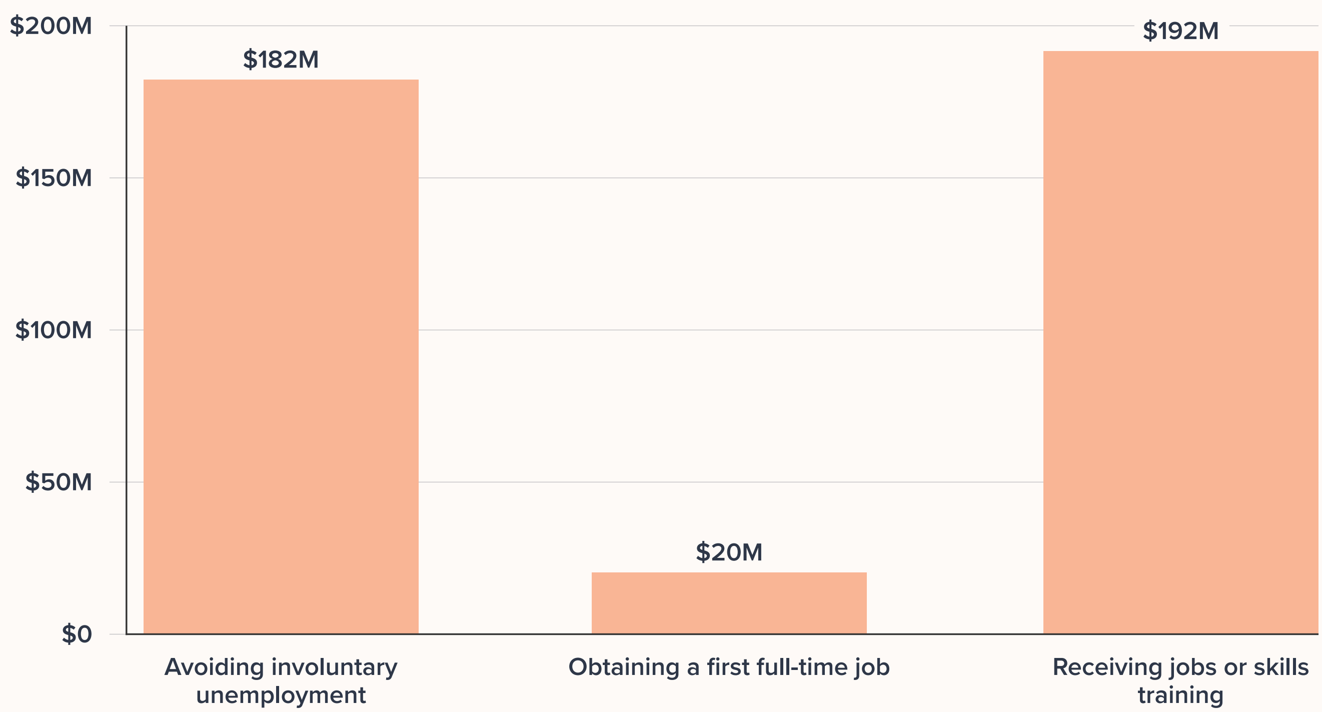
Source: Candid Foundation 1000

Career Progression

Experiences in the *Career Progression* domain accounted for just under 5 percent of total philanthropic funding to the Mobility Experiences in 2022. The *receiving jobs or skills training* and *avoiding involuntary employment* experiences received similar amounts of funding, at 49 and 46 percent respectively, while *obtaining a first full-time job that offers an opportunity for advancement* received just 5.2 percent of funding.

Philanthropic funders support both direct service interventions—such as career coaching and skill development—as well as the more effective use of public funding for workforce development. For instance, the Gates Foundation awarded a $5 million grant to Results for America to support local leaders to deploy federal and state dollars earmarked for training, job obtainment, and job quality improvements.

Exhibit B.6 Philanthropic funding flows to Mobility Experiences in the *Career Progression* domain, 2022



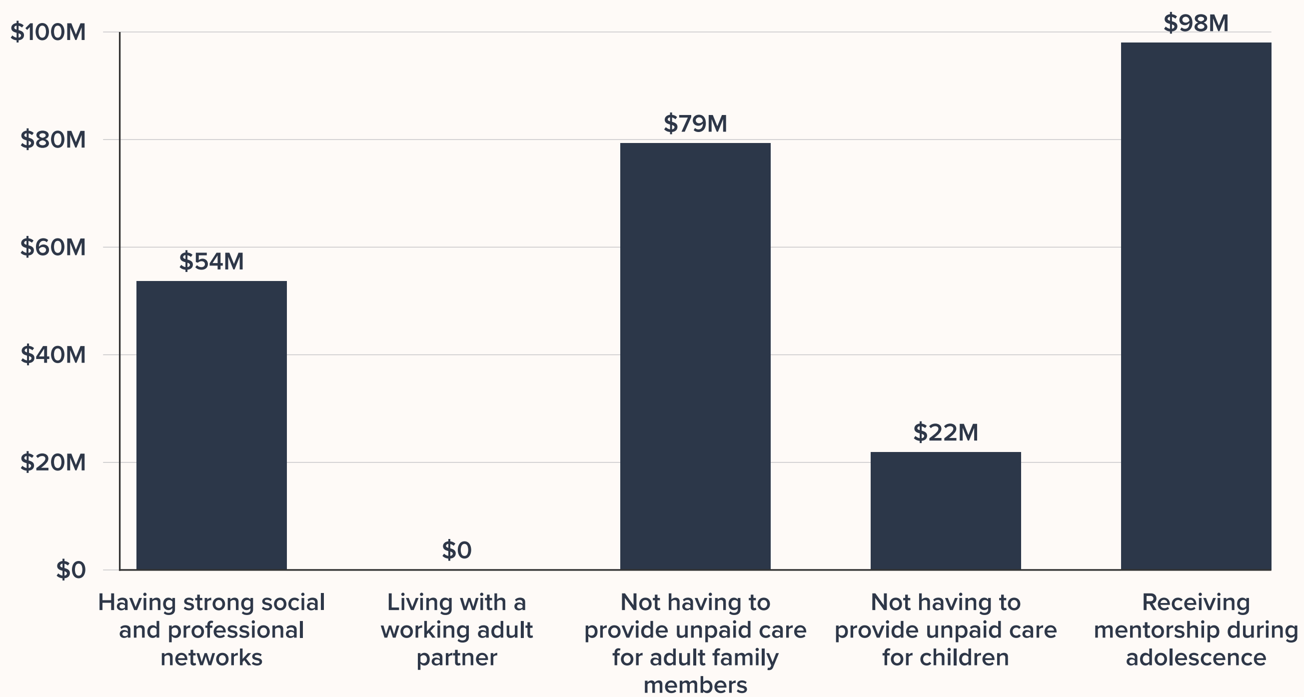
Source: Candid Foundation 1000

Social and Familial Relationships

The *Social and Familial Relationships* domain accounted for just 3 percent of total philanthropic funding to the Mobility Experiences in 2022. However, it saw the largest percentage increase in philanthropic funding from 2019 of all the Mobility Domains, with funding up 17 percent (adjusted for inflation) from 2019 levels. *Receiving mentorship during adolescence* received the largest share of funding at 38.8 percent, followed by *not having to provide unpaid care for children* at 31.4 percent, then by *not having to provide unpaid care for adult family members* and *having strong social and professional networks*, at 21.2 and 8.7 percent, respectively.

A significant amount of philanthropic dollars in this domain are directed towards mentorship programs, such as the Boys and Girls Club, that provide support in helping youth and adults alike navigate personal and professional challenges.

Exhibit B.7 Philanthropic funding flows to Mobility Experiences in the *Social and Familial Relationships* domain, 2022.

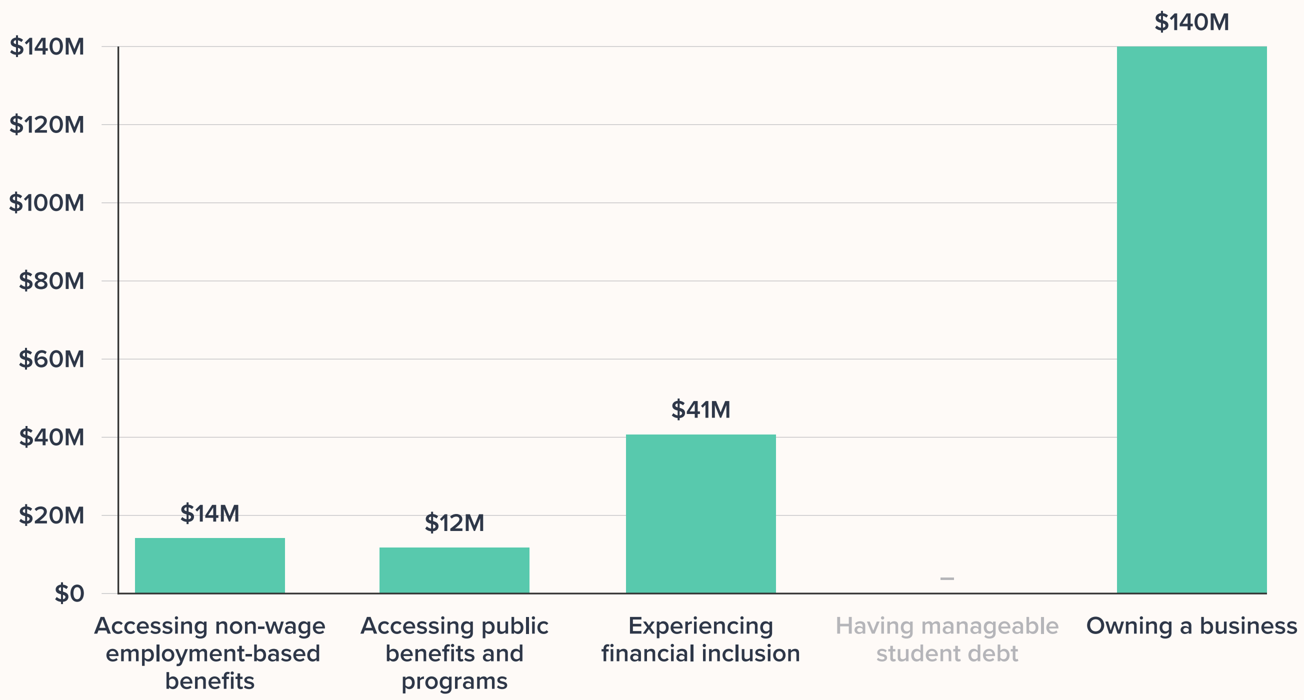


Source: Candid Foundation 1000

Financial Well-being

The final domain, *Financial Well-being*, received 2.5 percent of total philanthropic funding to the Mobility Experiences in 2022. The majority of philanthropic funding was directed towards the *owning a business* experience, which received more than two-thirds of the funding in this domain. The *experiencing financial inclusion* experience received just under 20 percent of funding, while the remaining three experiences received relatively small amounts.

Exhibit B.8 Philanthropic funding flows to Mobility Experiences in the *Financial Well-being* domain, 2022.



Source: Candid Foundation 1000

Appendix C. Characteristics of High-Impact Interventions

Exhibit C.1 Characteristics associated with high-impact interventions

✓ Most predominant characteristics in interventions for each Mobility Experience

Mobility Experience	Sustaining support over time	Providing wrap-around services	Tailoring supports to beneficiaries	Other[i]
Accessing pre-K and other early childhood development opportunities		✓		✓
Graduating with a degree in a high-paying field of study		✓		
Pursuing/completing postsecondary education	✓	✓	✓	
Receiving mentorship during adolescence		✓		✓
Employment and workforce development		✓		✓
Accessing non-wage employment based benefits including healthcare, retirement				✓
Living in a high economic mobility neighborhood		✓		✓
Having low exposure to traumatic experiences (including ACEs)	✓		✓	✓
Avoiding interactions with the criminal justice system	✓	✓		✓
Experiencing financial inclusion (including financial education and access)		✓	✓	

i Other support includes high-quality services, outputs-oriented programming, relationship-building and mentoring/coaching support, automatic enrollment, and educational and academic support.

Exhibit C.2 Illustrative examples of characteristics associated with high-impact interventions

Mobility Experience	Example application of characteristics associated with high-impact interventions
Accessing pre-K and other early childhood development opportunities	• **High-quality classroom environments:** Offering pre-K programs with trained teachers, evidence-based curricula that is implemented with fidelity, and strong student-teacher interaction • **High-dosage programs:** Delivering pre-K over longer school days sustained over time (e.g., full-time pre-K every weekday throughout the calendar year) • **Wrap-around services:** Providing complementary, high-quality wrap-around services to participants (e.g., nutritional and health support, financial support, social services, and parental support)
Graduating with a degree in a high-paying field of study	• **Wrap-around services:** Offering academic (e.g., residential education, mentoring, networking), practical (e.g., internship, research), and administrative support (e.g., college applications) • **Hands-on and sustained support during K-12 tenure:** Incorporating project-based learning opportunities into existing curricula
Pursuing/completing postsecondary education	• **Tailored supports to beneficiaries:** Targeting individual needs while offering a range of professional supports (e.g., guidance/coaching, outreach programs, college readiness programs) • **Sustained support over time:** Delivering multi-year programs that bridge academic transitions (i.e., before and during college tenure) • **Wrap-around services:** Offering comprehensive supports that address both academic and non-academic needs (e.g., social support and mentoring groups, financial aid)
Receiving mentorship during adolescence	• **Structured and output-oriented support:** Delivering a mentorship program that focuses on a specific goal (e.g., college application) and helps the mentee in specific tasks (e.g., financial aid application, deadline management) • **Tailored supports to beneficiaries:** Providing one-on-one advising and mentoring that focus on specific challenges that the mentee is facing

Exhibit C.2 Illustrative examples of characteristics associated with high-impact interventions

Mobility Experience	Example application of characteristics associated with high-impact interventions
Employment and workforce development	• **Hands-on training in high-opportunity sectors:** Focusing on high-paying, growing sectors (e.g., IT, finance) while offering real-world experience • **Wrap-around services:** Offering skillset development as well as job placement support (e.g., case management, job search assistance) • **Holistic support for skillset development:** Assisting beneficiaries in developing both technical skills (e.g., occupational and job-development skills) and non-technical skills (e.g., working norms, remedial training, behavior changes) • **Sustained programming over time:** Conducting high-dosage programs and routine follow-ups between program administrators and participants • **Academic and mentoring/coaching support:** Providing peer support and guidance for youth entering into their first full-time job
Accessing non-wage employment based benefits including healthcare, retirement	• **Automatic enrollment:** Providing direct and automatic enrollment to employees in additional non-wage programs, particularly when considering financial benefits like retirement • **Educational and behavioral nudges:** Promoting and explaining benefits to help employees understand what their employer offers and how they can maximize their benefits
Living in a high economic mobility neighborhood	• **Relocation support:** Offering complementary support (e.g., helping with security deposit financing) that encourages individuals to move to high mobility neighborhoods • **Connection to community counselors:** Connecting individuals who are moving from low to high mobility neighborhoods with community counselors to support re-establishment in new communities • **Wrap-around services:** Offering comprehensive services covering non-housing needs (e.g., job training, supplemental nutrition programs) to support community integration

Exhibit C.2 Illustrative examples of characteristics associated with high-impact interventions

Mobility Experience	Example application of characteristics associated with high-impact interventions
Having low exposure to traumatic experiences (including ACEs)	• **Tailored supports to beneficiaries:** Delivering therapy over a sustained period of 8-10 sessions that build coping skills and change thought patterns, providing individualized attention to each trauma • **School-level interventions:** Providing therapeutic services within K-12 schools, particularly for students who cannot afford private therapy • **Parental involvement:** Involving parents and children when delivering therapy to toddlers and young children, to strengthen relationships and boost children's sense of security
Avoiding interactions with the criminal justice system	• **Wrap-around services:** Offering wrap-around services, such as employment support, case management, and mental health and drug rehabilitation services • **Multi-stage support:** Delivering interventions for a sustained period that covers incarceration and re-entry • **Employment support and education:** Offering low-income, at-risk youth supports during time outside school, particularly in the summer months
Experiencing financial inclusion (including financial education and access)	• **Wrap-around services:** Delivering programs that simultaneously cover access to financial vehicles, education to successfully use them, and incentives to foster positive financial behavior • **Tailored supports to beneficiaries:** Offering one-on-one counseling sessions that target individual financial goals and last until participants' issues are resolved

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