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1. Purpose, sources, and approaches

- Rapid shifts in federal policy under the second Trump administration and 119th Congress signal profound impacts for local governments, civic institutions, and vulnerable populations

- This analysis provides an overview of how these shifts may be impacting areas of key interest to the Pittsburgh Foundation and its partners: health care, nutrition assistance, and affordable housing. It focuses primarily on impacts for the 10-county Southwestern PA region*

- It provides further contextual data on the local economic backdrop against which these shifts are occurring, and profiles the local immigrant population, which may be particularly vulnerable

- Many of these shifts are occurring due to the enactment of H.R. 1, a massive federal tax and spending bill adopted in 2025 (see next slide). The analysis uses estimates from government and research organizations to profile the law's potential impacts on Southwestern PA communities

- In addition, the analysis uses USASpending.gov data to track spending patterns for relevant federal agencies and subagencies in fiscal years 2024 and 2025, and through three-quarters of fiscal year 2026

* This includes Allegheny, Armstrong, Beaver, Butler, Fayette, Greene, Indiana, Lawrence, Washington, and Westmoreland counties. Where Southwestern PA-wide data are unavailable, some data reflect the Pittsburgh metro area, which excludes Greene and Indiana counties; and some reflect Allegheny County alone.

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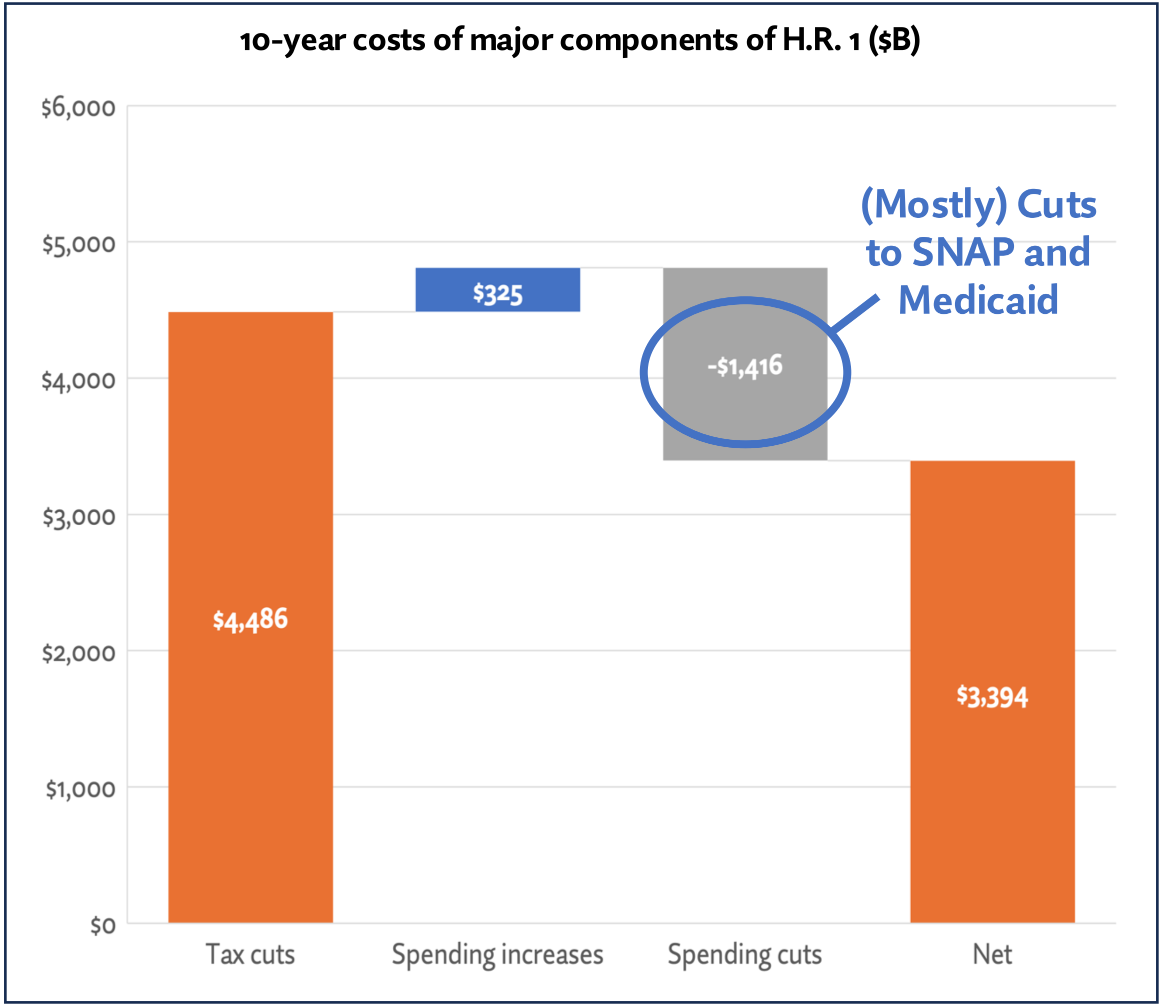
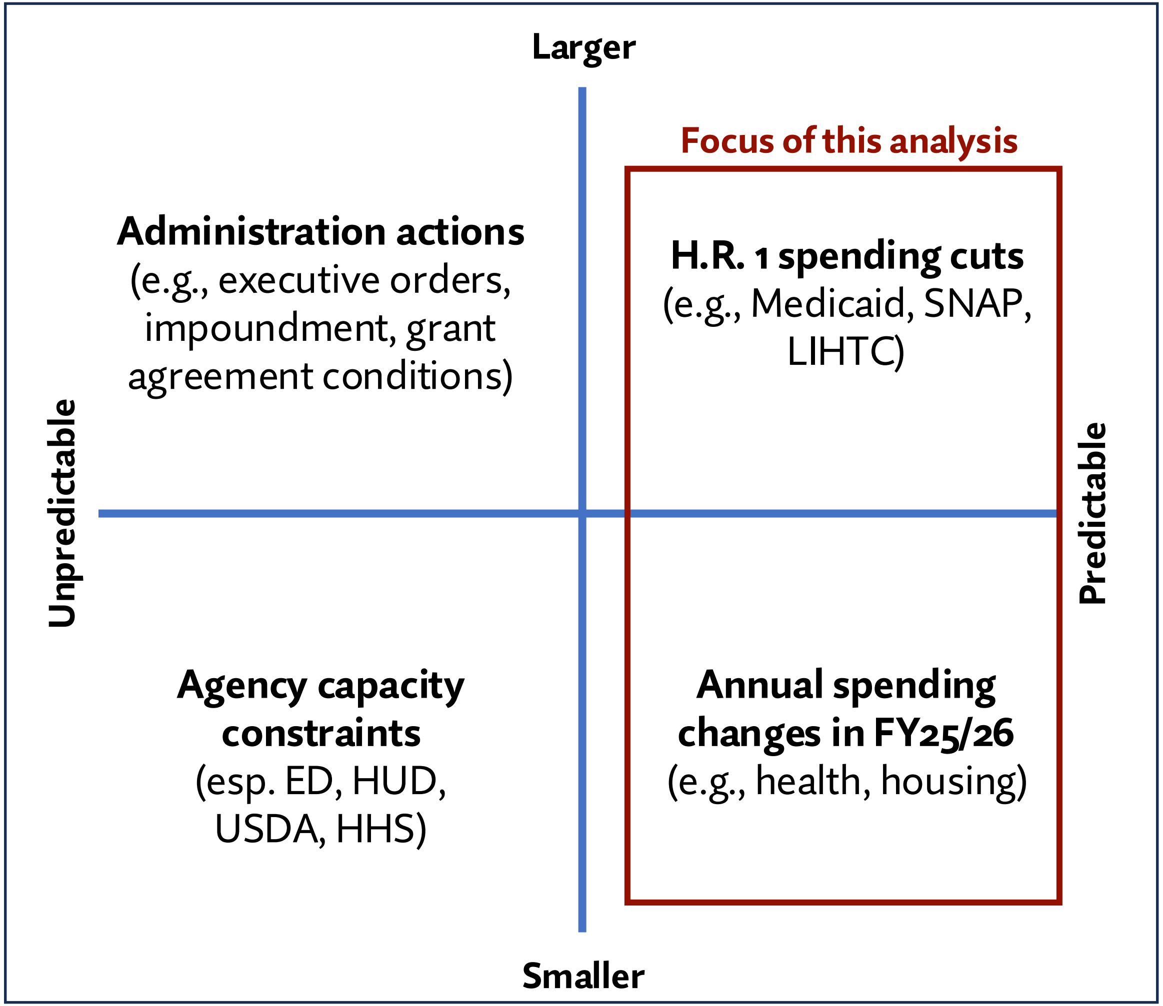
H.R. 1 was a massive federal tax and spending bill passed in July 2025

- H.R. 1 was a "reconciliation" bill, adopted through procedures designed to reconcile long-term tax and mandatory (i.e., entitlement) spending programs
- The bulk of the bill's $3.4 trillion cost over the next 10 years comes from extending tax cuts first adopted in 2017, and adding a few new ones
- To offset the cost of those tax cuts somewhat, the bill cuts spending on Medicaid, SNAP (formerly Food Stamps), and other programs by an estimated $1.4 trillion over the next 10 years
- These represented the largest reductions on record to federal safety net programs, and will have significant impacts on low-income residents of Southwestern PA



States and localities face a range of risks from federal policy changes

- The impact of federal policy changes occurring during the second Trump administration and 119th Congress can be assessed along two dimensions: **magnitude** and **predictability**
- This analysis focuses primarily on changes that fall on the *predictable* end of the spectrum, i.e., quantifiable impacts from H.R. 1 implementation and changes in agency budgets and spending
- States and localities also face risks from less predictable/quantifiable sources: administrations actions that aim to effect executive priorities on Congressionally-approved spending; and capacity constraints resulting from federal personnel policies (e.g., hiring/firing/resignations)



3. Economic overview

- **Past year**: Southwestern PA economy continued to expand, although job growth faltered in early 2026
- **Long-term**: Southwestern PA incomes have grown faster than the U.S. average ***except*** for low-income households
- **The upshot**: The region's low-income households face rising economic and policy risks from a precarious baseline

4. Overall federal spending

- Southwestern PA received **$2.6 billion** in federal grants in FY2025, with higher ed accounting for more than **$1 billion**
- Federal grants to the region were steady between FY2024 and FY2025; but grants to governments and nonprofits fell
- Grants to the region have stabilized thus far in FY2026, as Congress rejected most Trump-proposed agency cuts
- **The upshot:** Federal grants will remain crucial to the region, especially as H.R. 1 cuts begin to take effect

5. Health care

- **H.R. 1 changes to Medicaid**: H.R. 1 imposes first-ever work requirements and new paperwork burdens for adults covered under ACA Medicaid expansions and terminates coverage for several categories of legal immigrants.
  - **Local impacts:** DHS estimates that **54,000** Southwestern PA residents will lose coverage, reducing federal subsidies by **$413M** annually
- **ACA enhanced subsidies**: Enhanced federal subsidies for purchasing health insurance on Pennie, the state's exchange, expired at the end of 2025, raising average monthly premiums by **50-100%**
  - **Local impacts:** **28,000** Southwestern PA residents have terminated coverage since the start of open enrollment due to ballooning costs
- **HHS funding:** Grants to Southwestern PA for health research (NIH), welfare/childcare (ACF), and health clinics (HRSA) have mostly held steady, while grants for public health have slowed/declined

6. Nutrition assistance

- **H.R. 1 changes to SNAP**: H.R. 1 expands work requirements for many adults without young children, terminates eligibility for several categories of legal immigrants, and raises state administrative costs by as much as $100M
  - **Local impacts**: DHS estimates that these changes will cause **29,000** Southwestern PA households to lose SNAP, equaling **$61M** in lost annual federal benefits
- **Regulatory changes to SNAP:** Forthcoming USDA rule changes could remove Broad-Based Categorical Eligibility for SNAP, affecting many working families
  - **Local impacts:** Based on projected impacts to Pennsylvania households, these changes could affect more than **56,000** Southwestern PA residents

7. Affordable housing

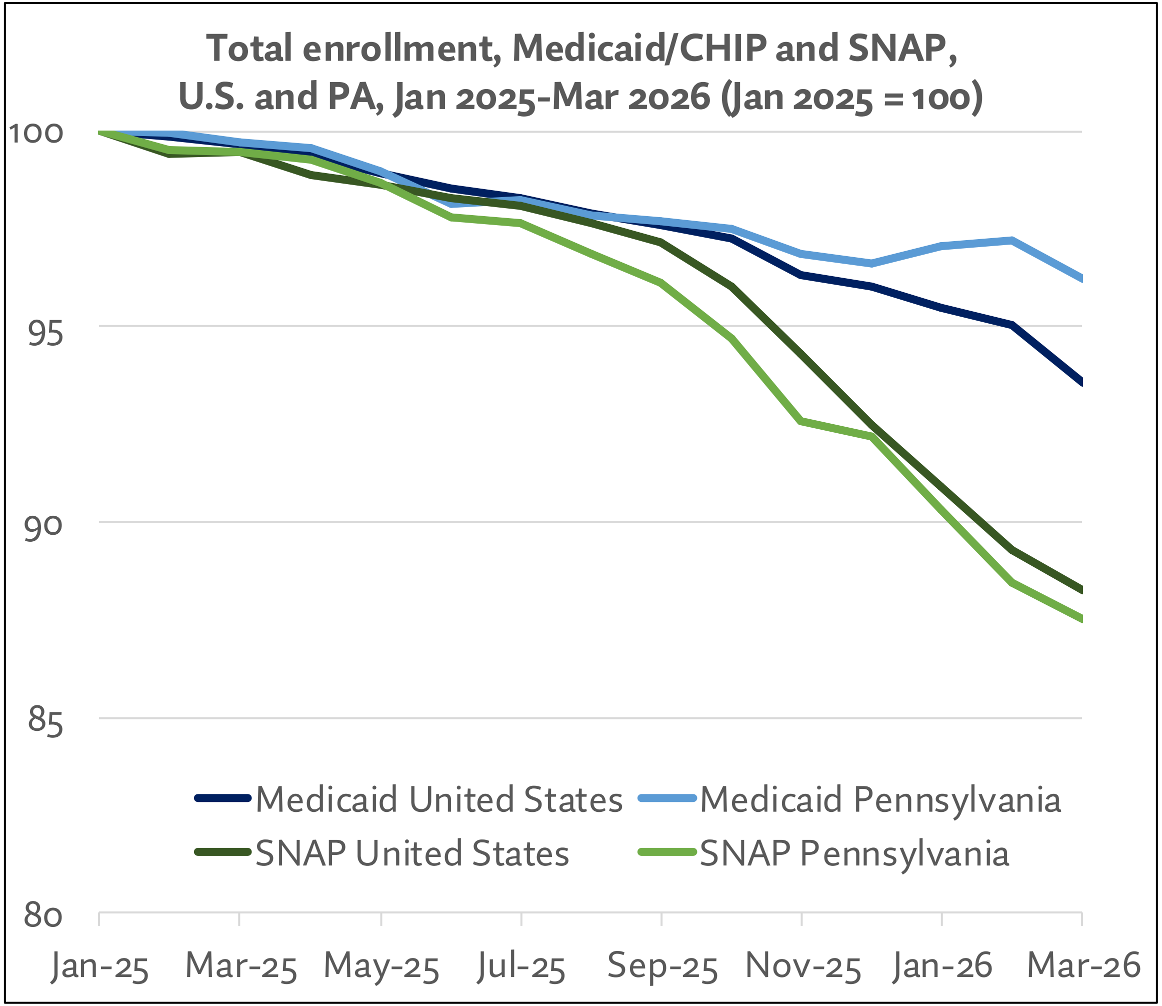
- **H.R. 1 changes to LIHTC**: H.R. 1 expands access to valuable 9% Low Income Housing Tax Credits (LIHTC)
  - **Local impacts**: This could result in an additional **900-1,000** affordable units/year built in Southwestern PA
- **HUD funding:** The Public Housing Operating Fund is slated for a 15% cut in FY26, which would represent $18M of the region's FY25 allocation
- **Homelessness funding:** New restrictions on Housing First approaches could imperil many Southwestern PA providers

8. Immigration

- **Foreign-born in Southwestern PA:** The Pittsburgh metro area has a relatively low foreign-born share of population **(4%)** compared to other large metro areas
- **Immigrant status**: 50,000 foreign-born area residents are not U.S. citizens, and another 50,000 U.S.-born children live with at least one immigrant parent. These groups may face greater risks from federal immigration enforcement

Enrollment in Medicaid and SNAP is already declining

- Between January 2025 and March 2026, enrollment in the Medicaid and CHIP programs has declined by **6%** nationally, and **4%** in Pennsylvania
- SNAP enrollment declines have been even sharper, by **12-13%** in both Pennsylvania and the U.S. overall
- Experts cannot attribute these declines to changes in eligibility resulting from improvements in the economy. Rather, these declines likely represent early impacts from new restrictions introduced by HR 1
- In addition, states are likely implementing policies to reduce payment error rates in SNAP, which have the effect of broadly reducing enrollment

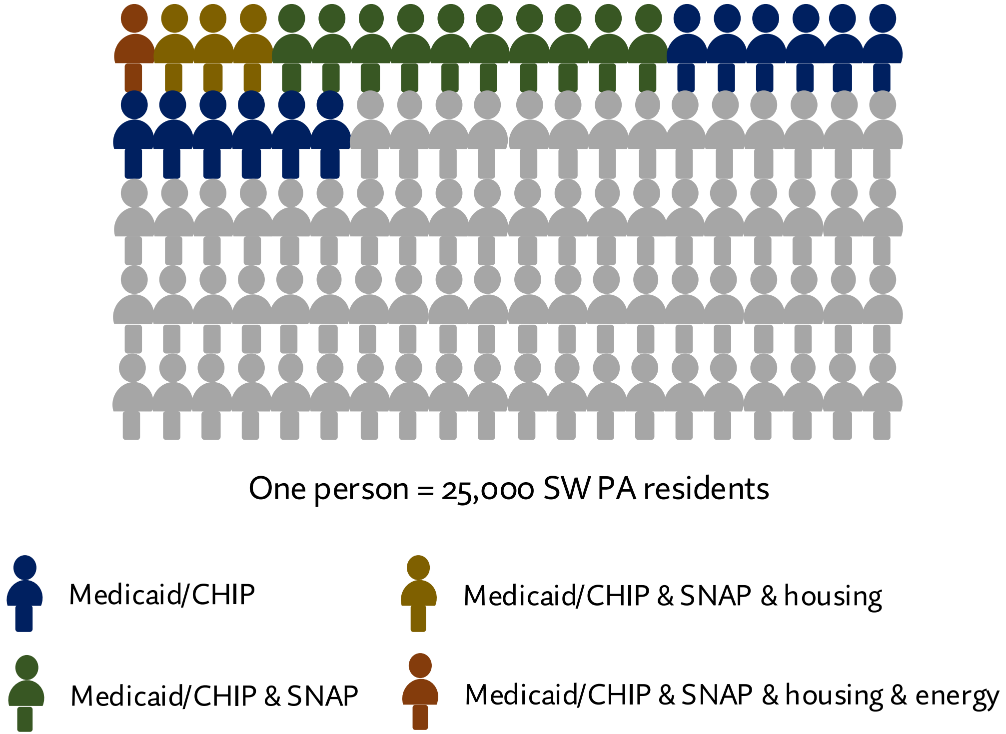


Source: Centers on Medicare and Medicaid Services; Center on Budget and Policy Priorities

Cuts to federal programs compound for many participating families

- About one in four Southwestern PA residents (625,000) receives **Medicaid/CHIP**
- Nationwide, 40% of individuals receiving **Medicaid/CHIP** also receive **SNAP**, which would equate to 250,000 regional residents
- Nationwide, 22% of individuals receiving **Medicaid/CHIP** and **SNAP** also receive **federal housing subsidies**, which would equate to 55,000 regional residents
- Nationwide, 34% of individuals receiving **Medicaid/CHIP**, **SNAP**, and **federal housing subsidies** also receive **federal energy assistance**, which would equate to 19,000 regional residents
- In this way, cuts to multiple federal programs will compound for vulnerable Southwestern PA residents

Overlap in participation in selected public benefit programs, Southwestern PA



Based on estimates from U.S. Census Bureau, "Who is Receiving Social Safety Net Benefits?" (2024)

Important aspects of H.R. 1 and other federal changes will occur through 2028

July 2025
- H.R. 1 adopted
- Many immigrants lose SNAP eligibility
- LIHTC expanded

Oct-Nov 2025
- SNAP work requirements expand
- SNAP benefit reductions begin (thru 2027)

Jan-Feb 2026
- Enhanced ACA subsidies expire
- Public housing fund reduced

Jun 2026
- HUD restricts support for Housing First approaches

Oct 2026
- Many immigrants lose Medicaid eligibility

Jan 2027
- Expanded Medicaid recertification requirements begin
- Medicaid work requirements begin

Oct 2027
- Feds halve reimbursement for SNAP administrative costs
- Restrictions on Medicaid provider taxes begin (thru 2032)

Oct 2028
- States must begin to pay share of SNAP benefit costs if payment error rate is too high

State/local policymakers can mitigate impacts on vulnerable families and communities

Replace lost federal funding

- Provide health insurance coverage for individuals who lose Medicaid eligibility
  - See: CT, NY
- Cover increased share of SNAP administrative costs
  - Was in Gov. Shapiro's proposed budget, not clear if it survived

Use state discretion on implementation

- Connect state data systems to facilitate re-enrollment in Medicaid and SNAP
- Make policy and implementation choices that minimize burden and reduce coverage loss

Strengthen local safety nets

- Increase support for food banks, free health clinics
- Investigate Moving to Work (MTW) option for PHAs provided by new housing bill

Advocate for federal changes

- Partner with federal delegation to support rollback of HR 1 cuts, oppose punitive rules, protect critical safety net appropriations

3. Economic overview

- Jobs
- Unemployment
- Job postings
- Inequality
- Previous recession impacts

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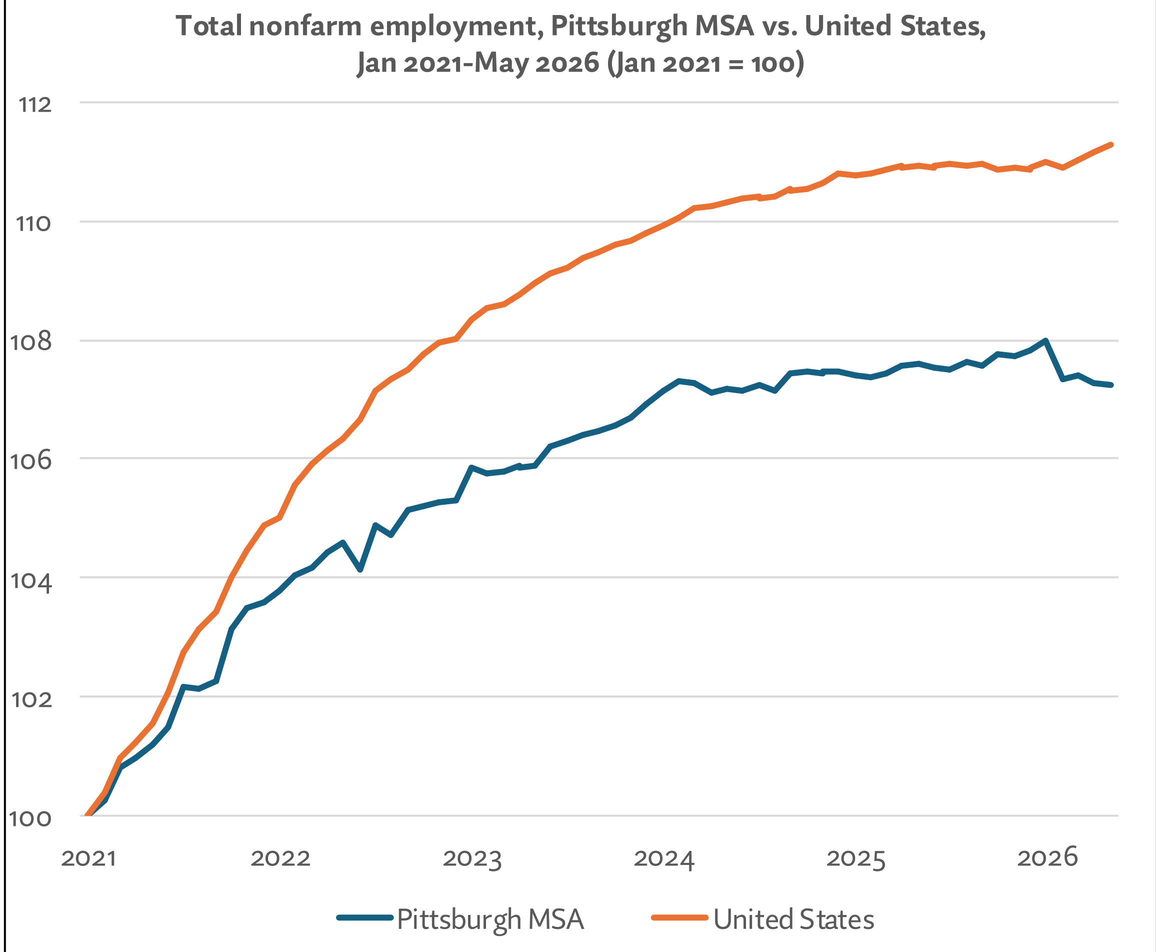
Jobs continued to grow, albeit slowly, in the Pittsburgh region through 2025

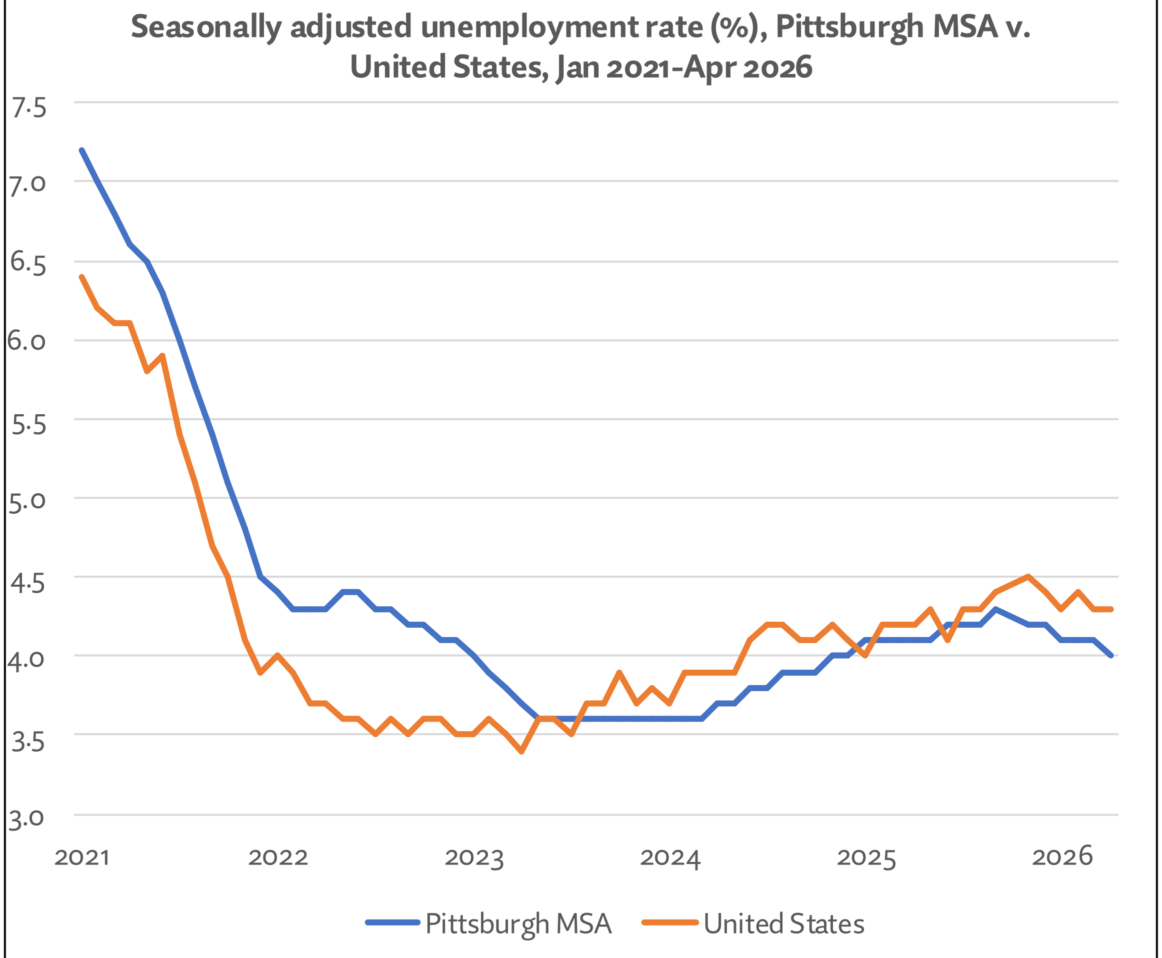
- The Greater Pittsburgh economy has been on a slower growth trajectory than the U.S. economy overall for several decades
- As U.S. job growth slowed over the course of 2025, job growth in the Pittsburgh metro area continued at roughly the same average pace as in recent years, but faltered somewhat as we entered 2026
- Notwithstanding the region's relative economic resilience, it confronts an uncertain macroeconomic environment in owing to continued federal budget uncertainty, war in Iran, rising energy prices, unstable trade policies, and concerns over an "AI bubble"



Source: Bureau of Labor Statistics

Unemployment, while still low, has risen since 2024 in Greater Pittsburgh

- The unemployment rate in the Pittsburgh metro area reached a 30-year low in early 2024, at 3.5%
- The rate inched up slightly over the course of 2024, climbed in 2025 as job growth slowed, and has falled in 2026. As of April 2025, it stands at 4.0%, slightly below the national average
- While the unemployment rate does not capture people who have left the labor market altogether, the Pittsburgh MSA maintains a higher employment-to-population ratio (78.5%) among 20-to-64-year-olds than the U.S. overall (76.0%)



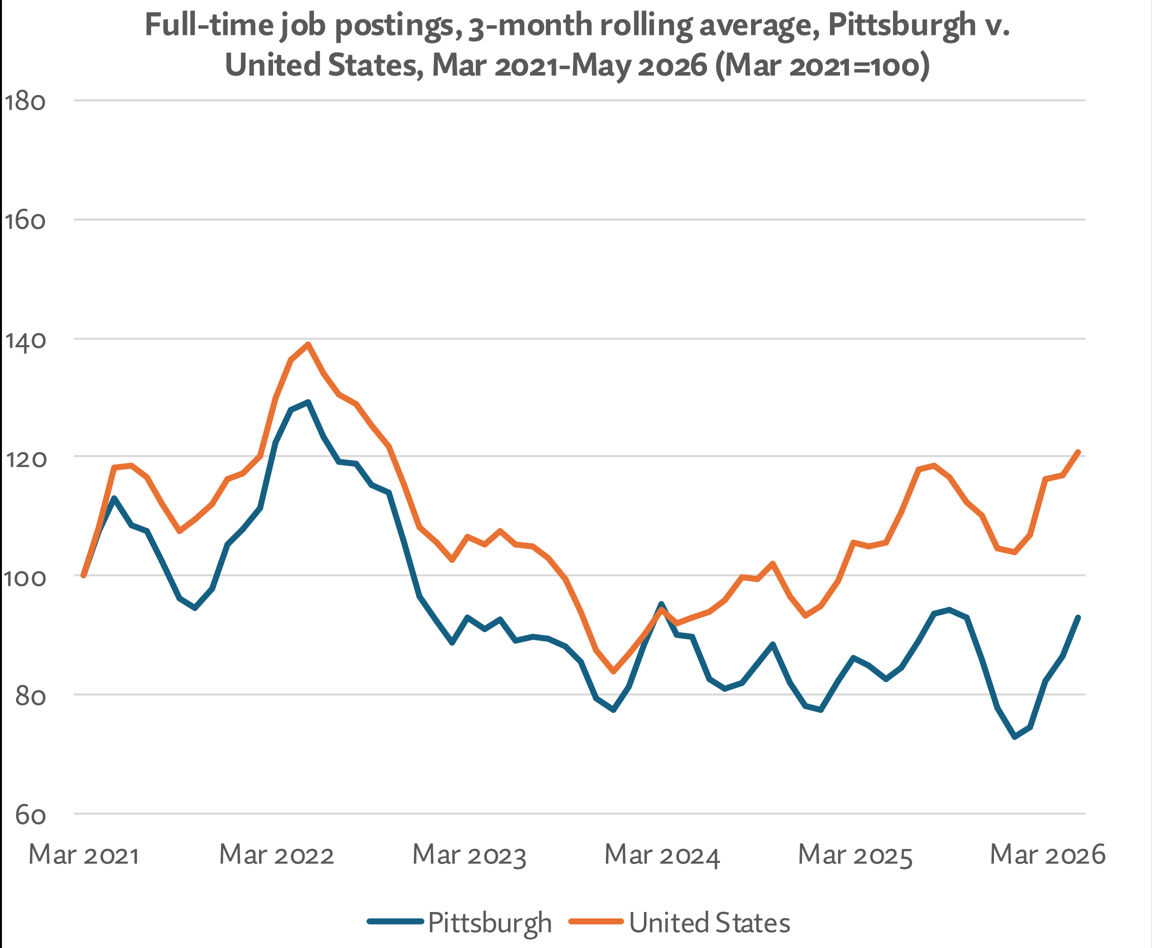
Source: FRED

Job postings in Pittsburgh have slowed relative to U.S. average

- Job postings indicate the strength of employer demand for workers in a labor market. Postings soared in the wake of the pandemic as the economy bounced back, then moderated in 2022 and 2023

- Job postings stayed flat in Pittsburgh in 2024, as they began to rise nationally. Postings accelerated locally and U.S.-wide in early 2025, before dropping in late 2025 amid rising economic uncertainty

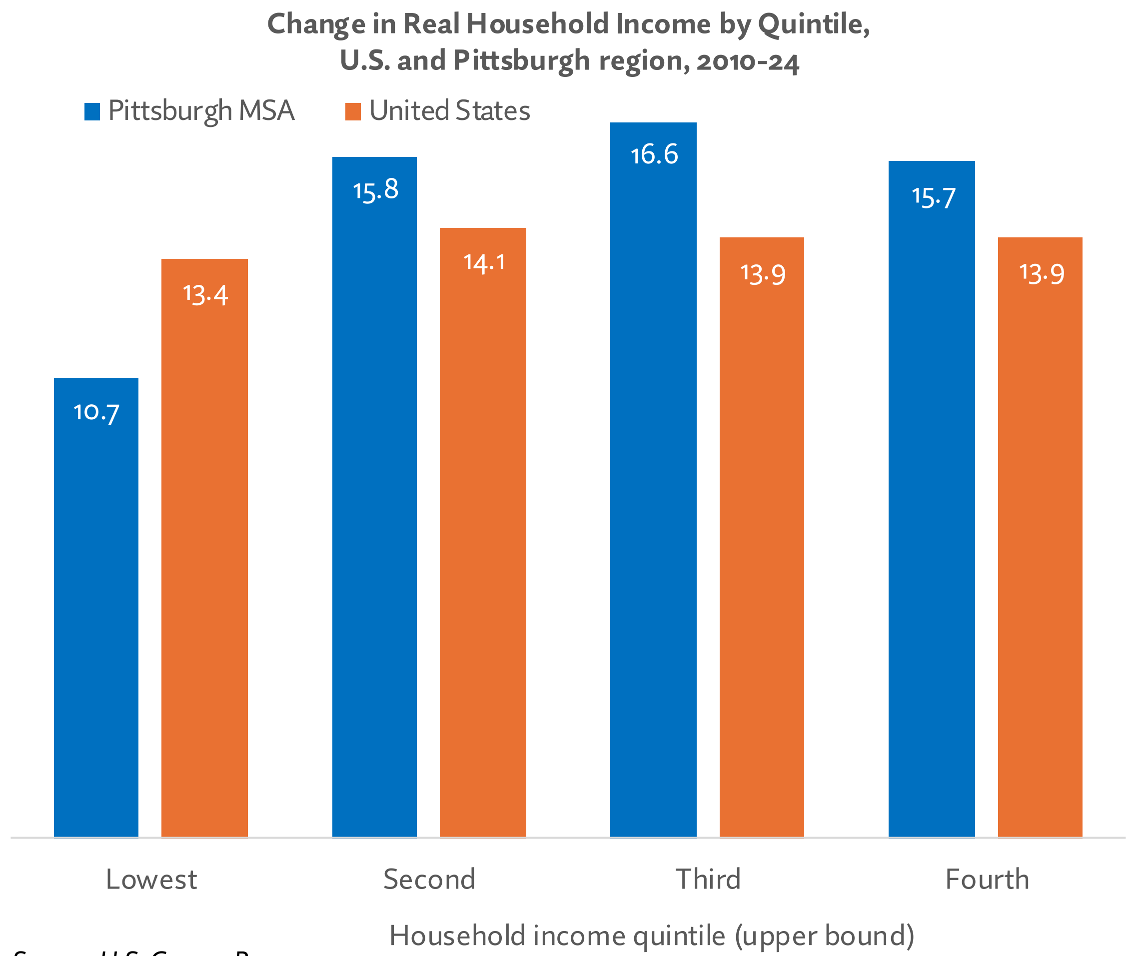
- Postings have rebounded so far in 2026 but suggest a "low-hire, low-fire" labor market environment



Source: Lightcast

Longer-term, the region's low-income households have lagged peers on income growth

- Since 2010, incomes have grown at similar rates nationwide for lower, moderate, middle, and upper-middle income households
- In the Pittsburgh metro area, however, low-income households (in the bottom 20%) have lagged U.S. peers on income growth, while other groups have outpaced them
- These trends have made Southwestern PA a somewhat more unequal place, and increased relative need among its low-income workers and families



Source: U.S. Census Bureau

Safety nets responded to past recessions

- If the national and local economy slide into recession in the coming year(s), it will test the resiliency of the safety net.
- During the last significant economic downturn—the Great Recession in the late 2000s—the unemployment rate in Southwestern PA spiked, and many more residents fell into poverty.
- The safety net at that time responded—the number of people receiving federal health and food assistance rose substantially. Changes that H.R. 1 made to safety net programs could displace not only currently eligible recipients, but many more who face hardship in the event of a recession.

Source: U.S. Census Bureau; USDA; PA DHS

Change in key economic indicators and programs, Southwestern PA, 2007-2011

+2.9%
Change in unemployment rate

+11%
Change in number of people living in poverty

+13%
Change in persons receiving Medicaid

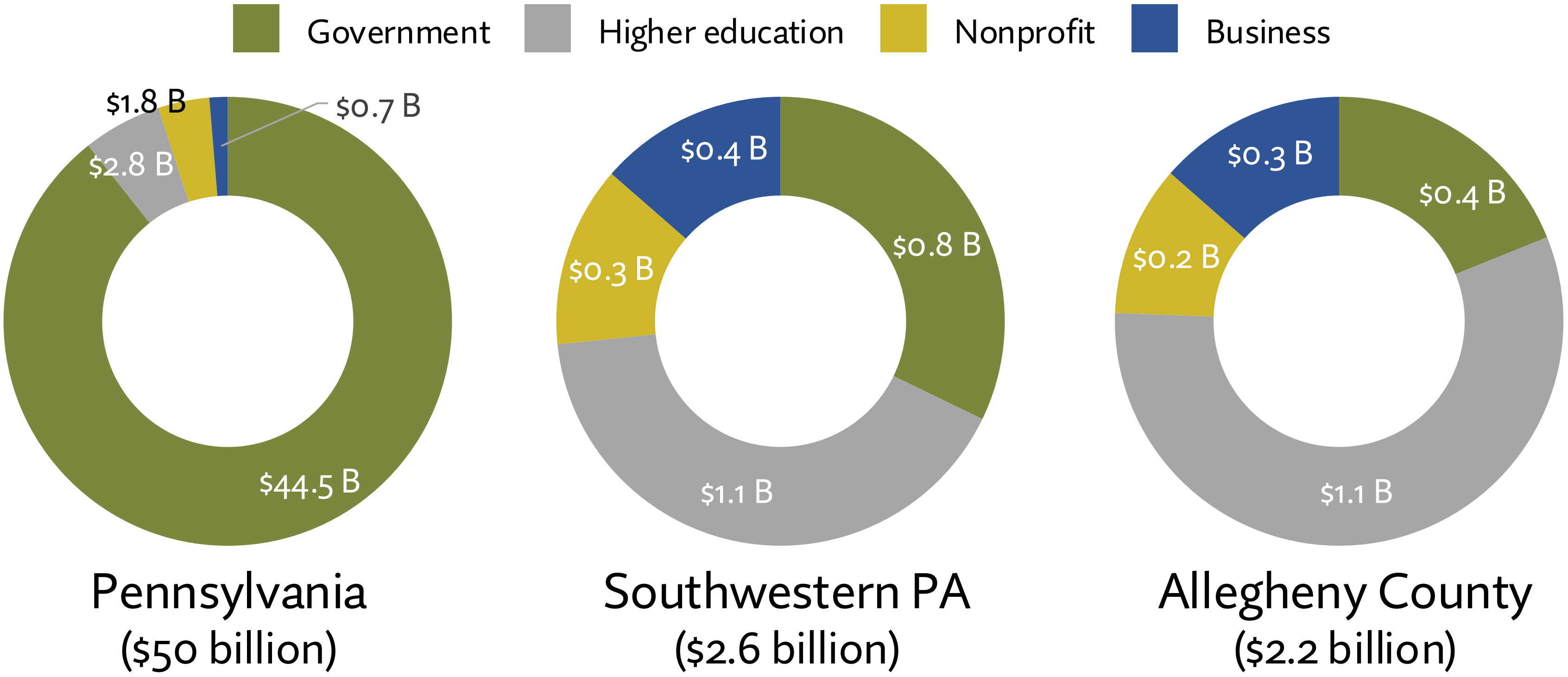
+41%
Change in persons receiving SNAP benefits

4. Overall federal spending

- By sector
- By function

Southwestern PA received $2.6 billion in federal grants in 2025

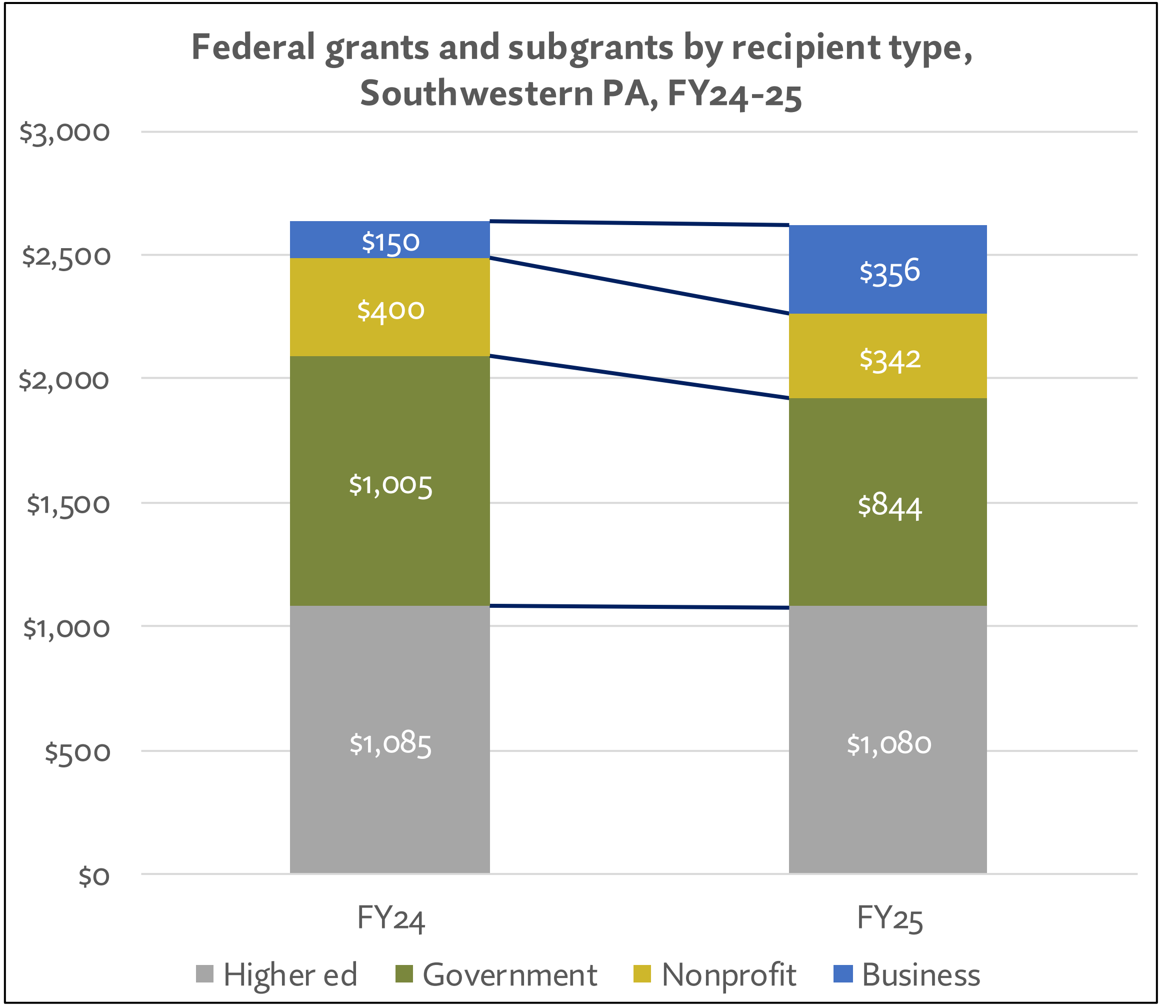
Federal grant dollars by recipient type and geography, FY2025



Source: USASpending.gov

Federal funding to local governments and nonprofits fell last year

- Overall federal grant funding to Southwestern PA held steady at $2.6B in FY24 and FY25
- While grants to higher ed institutions held steady and grants to businesses expanded*, grants for both nonprofits and governments shrank
- The fall in grant funding could have been steeper but for a series of federal awards made in the first few months of FY25, which coincided with the last few months of the Biden administration. The Trump administration may subsequently have frozen some of those grants, suggesting the effective funding decline could be larger



Source: USASpending.gov

**The increase in business funding was largely attributable to one clean energy demonstration grant to The Heinz Companies*

Funding to the region has stabilized somewhat in FY26

- Some agencies delivered considerably larger sums to Southwestern PA in FY25 than FY24 (esp. Energy and EPA), as the Biden administration moved to spend one-time money early in the fiscal year
- Other agencies delivered less funding to Southwestern PA, as the Trump administration froze, delayed, or canceled grant-making in areas including housing, labor, education, and transportation
- Federal grants have stabilized closer to FY24 levels so far in FY26, although declines continue in some areas (e.g., agriculture, housing, parks, transportation). Education funding has rebounded after prior delays

Source: USASpending.gov
**Grants and subgrants awarded through June 20 of each year*

Change in federal grants by funding agency ($M), SW PA, FY24 to FY26

Agency	Change, FY24-FY25	Change, FY24-FY26*
Dept. of Energy	+223	-17
Environ. Protection Agency	+171	-6
Veterans Affairs	+3	8
Treasury	0	0
Small Business Admin.	-1	0
Health and Human Services	-4	0
Dept. of Agriculture	-7	-101
Dept. of Commerce	-7	-1
Dept. of Justice	-11	-2
Housing and Urban Dev.	-13	-25
Dept. of Labor	-17	+7
Dept. of Interior	-17	-24
Dept. of Education	-40	+186
Dept. of Transportation	-217	-71

5. Health care

- Medicaid
- Pennie (ACA)
- Other federal funding

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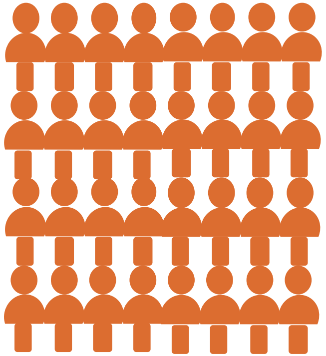
Medicaid in Southwestern PA

- About 3 million Pennsylvanians, and 527,000 Pittsburgh-area residents—more than one in five region-wide—received health insurance through Medicaid in 2025.
- Of these, about 750,000 statewide, and 132,000 in Southwestern PA, were adults covered through the Medicaid expansion created by the Affordable Care Act.
- Medicaid is jointly financed by federal and state governments, with the state share varying depending on measures of economic need and fiscal capacity. The Commonwealth of Pennsylvania pays approximately 40% of statewide Medicaid program costs (KFF, 2024).

Enrollment in Medicaid, Southwestern PA, 2025

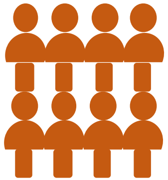


527,000

Total Medicaid enrollees

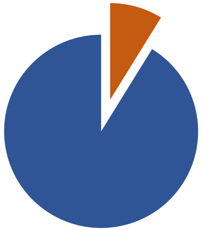
21%

Share of regional population



132,000

Medicaid expansion enrollees



9%

Share of region age 18-64

Source: PA Department of Human Services

5. Health care

H.R. 1 makes several changes to Medicaid that will reduce enrollment

- The Congressional Budget Office projects that H.R. 1's changes to the Medicaid program will reduce nationwide program enrollment by **7.5M** over the next several years, relative to current law
- Most of these changes will take effect in the next 1-2 years
- Financing changes will reduce state flexibility gradually over a 5-year period
- States can take steps to mitigate the impact of H.R. 1's changes on enrollment, and/or can use own-source revenues to fill the resulting coverage gaps

Source: KFF, PA Health Law Project

Immigrants: H.R. 1 makes several categories of legal immigrant adults (e.g., refugees, asylees, humanitarian parole) ineligible for Medicaid
Effective: October 1, 2026

Work requirements: H.R. 1 establishes work requirements for adults age 19-64 receiving Medicaid expansion (80 hours/month)
Effective: January 1, 2027

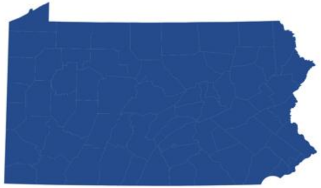
Recertification: H.R. 1 obligates adults receiving Medicaid expansion to undergo eligibility renewals every 6 months (up from 1x/year)
Effective: December 31, 2026

Financing: H.R. 1 limits states' use of provider taxes and state-directed payments to finance their share of Medicaid spending
Effective: October 1, 2027—September 30, 2032

H.R. 1 will cut eligibility and enrollment for Medicaid statewide and in Southwestern PA

- The Kaiser Family Foundation, using CBO estimates, projects that H.R. 1's changes to the Medicaid program will reduce program enrollment in PA by **310k** over the next several years, relative to current law
- Most of the changes will impact low-income adults in the Medicaid expansion group
- Pennsylvania DHS estimates suggest that **54,000** fewer Pittsburgh-area residents would be covered under Medicaid as a result of H.R. 1 implementation
- Based on federal data showing $7,600 in annual per-enrollee federal spending for PA's Medicaid expansion population, this would mean **$2.4 billion** in statewide cuts, and **$413 million** in Southwestern PA cuts

Impacts of H.R. 1 Medicaid cuts on enrollment and spending, Pennsylvania and Southwestern PA



Pennsylvania-wide

310,000 people
Projected to lose coverage

$2.4 billion
Estimated annual federal subsidies

Southwestern PA

54,000 people
Projected to lose coverage

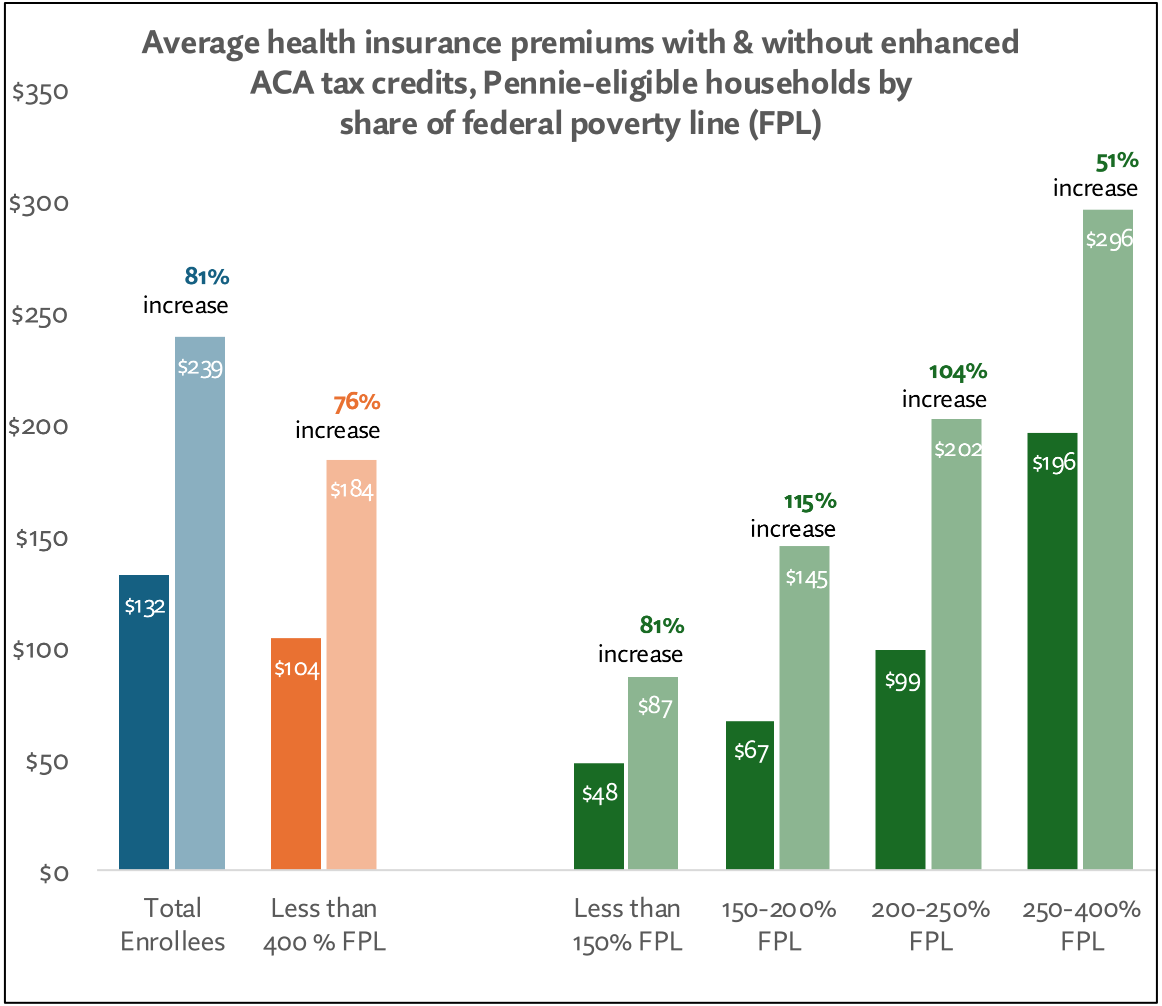
$413 million
Estimated annual federal subsidies

Source: Pennsylvania DHS, Centers for Medicare and Medicaid Services

Changes to the ACA marketplace are also affecting lower-income residents

- H.R. 1 imposes work and paperwork requirements on many Pennie enrollees, similar to those impacting adults covered through the Medicaid expansion
- New rules adopted by the Trump administration limit access to marketplace coverage and subsidies for low-income enrollees
- The PA Health Insurance Exchange Authority (Pennie) estimates that the expiration of enhanced premium tax credits at the end of 2025 raised average premiums by 102%
- State officials believe these changes could ultimately lead half of Pennie enrollees to lose coverage. This could impact **50,000** enrollees in Southwestern PA

Source: Pennie

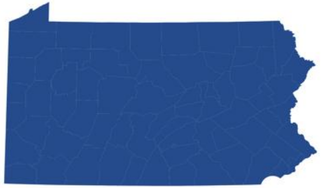


Many Southwestern PA enrollees have terminated Pennie coverage

- Since the start of 2026 Open Enrollment (OE), Pennie reports that **160,000** Pennsylvanians have terminated health insurance coverage, about one-third of total enrollees
- In Southwestern PA, more than **28,000** have terminated coverage. Greene and Beaver counties rank among the counties statewide with the highest termination rates
- While some individuals terminated coverage, others enrolled. However, the rate of new enrollments for 2026 (17%) was significantly below the rate for 2025 (21%)

Source: Pennie

Pennie enrollment terminations, December 2025 to June 2026



Pennsylvania-wide

160,000
Enrollees terminating coverage

34%
Share of enrollment at start of OE

Southwestern PA

28,000
Enrollees terminating coverage

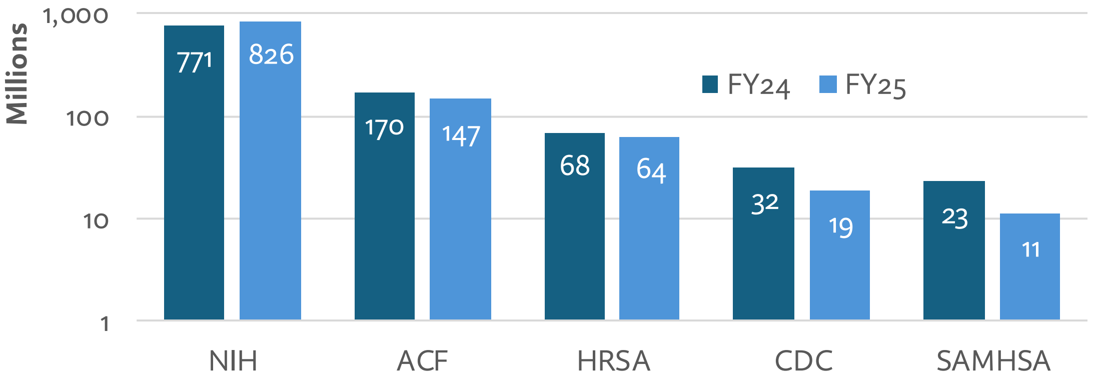
31%
Share of enrollment at start of OE

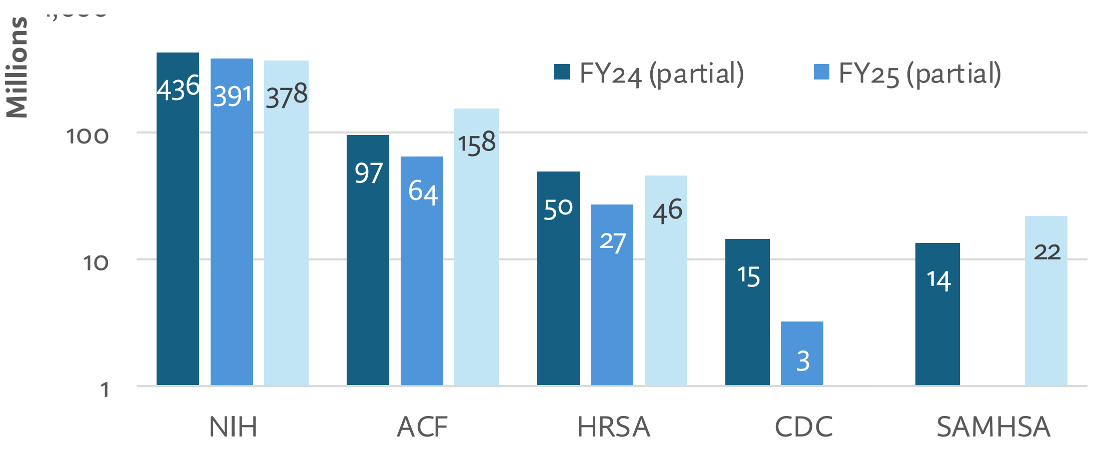
Federal health grants to the region were mostly stable in FY25, but lag in some areas in FY26

- Overall, the U.S. Department of Health and Human Services (HHS) awarded **$1.09 billion** in grants to Southwestern PA recipients in FY25, about the same as in FY24
- Most HHS support to the region comes in the form of NIH grants, which totaled **$826 million** in FY25. Grants thus far in FY26 are slightly lagging prior years
- Other important sources of HHS grants for vulnerable families (ACF) and community health care (HRSA) provided slightly less to Southwestern PA in FY25 than FY24
- Funding from the CDC and SAMHSA (mental health and substance abuse) dropped in FY25, and minimal CDC funding has flowed to Southwestern PA thus far in FY26

Source: USASpending.gov
Partial years include grants and subgrants issued through 6/20

Grants to Southwestern PA recipients, HHS agencies, FY24-FY26





6. Nutrition assistance

- Supplemental Nutrition Assistance Program (SNAP)

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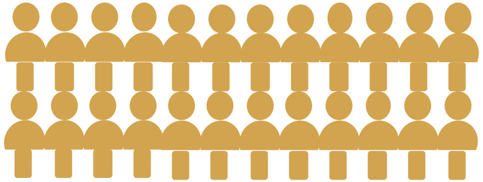
SNAP in Southwestern PA

- About **2 million** Pennsylvanians, and **350,000** Pittsburgh-area residents—about one in seven region-wide—participated in the Supplemental Nutrition Assistance Program (SNAP) in July 2025
- The average SW PA SNAP household receives **$310** per month in benefits toward the purchase of food for consumption at home. That equates to roughly **$740 million** annually for Southwestern PA participants
- SNAP benefits are fully funded by the federal government, and federal and state governments split the administrative costs. Recipient households generally have incomes below 130% of the poverty line, or about $35,000/year for a family of three

Source: U.S. Department of Agriculture

SNAP recipients and benefits in Southwestern PA, 2025



350,000

Total persons receiving SNAP

14%

Share of regional population

$740 million

Total annual SNAP benefits

$310

Average monthly SNAP benefit

6. Nutrition assistance

H.R. 1 makes several changes to SNAP similar to those impacting Medicaid

- The Congressional Budget Office projects that H.R. 1's changes to the Medicaid program will reduce nationwide program enrollment by **2.4M** over the next several years, relative to current law
- Some of the program changes have already happened (immigrant eligibility, expanded work requirements), while others will take effect in the next 1-2 years
- States can take steps to mitigate the impact of H.R. 1's changes on enrollment, and/or can use own-source revenues to fill the resulting coverage gaps

Immigrants: H.R. 1 makes several categories of legal immigrant adults (e.g., refugees, asylees, humanitarian parole) ineligible for SNAP
Effective date: July 4, 2025

Work requirements: H.R. 1 expands the range of able-bodied adults without dependents who must meet work requirements (80 hours/month) to receive SNAP
Effective date: November 1, 2025

Benefit cuts: H.R. 1 eliminates certain allowances and adjusts food price calculations in ways that trim SNAP benefits for many households
Effective date: October 1, 2025—October 1, 2027

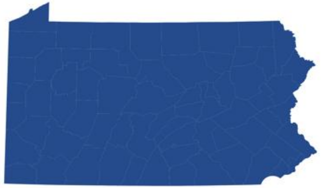
Financing: H.R. 1 halves the share of SNAP administrative costs paid by the federal government, and obligates states to pay a share of benefit costs if they fail to reduce payment error
Effective dates: October 1, 2027 and October 1, 2028

H.R. 1 will cut eligibility and enrollment for SNAP statewide and in Southwestern PA

- Pennsylvania DHS estimates that H.R. 1 will reduce SNAP enrollment statewide by **144,000** individuals
- Most of the initial changes will impact adults without dependent children (**PEERs**—Pennsylvanians with Employment and Engagement Requirements)
- Pennsylvania DHS estimates suggest that **29,000** fewer Southwestern PA residents would receive SNAP as a result of H.R. 1 implementation
- Based on federal data showing $2,254 in annual per-participant benefits for PA's SNAP enrollees, this would mean **$311 million** in statewide cuts, and **$61 million** in Southwestern PA cuts

Source: Pennsylvania DHS, USDA

Impacts of H.R. 1 SNAP cuts on enrollment and spending, Pennsylvania and Southwestern PA



Pennsylvania-wide

144,000 people
Projected to lose benefits

$311 million
Estimated annual federal subsidies

Southwestern PA

29,000 people
Projected to lose benefits

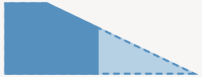
$61 million
Estimated annual federal benefits

Further regulatory changes to SNAP could cause many more Pennsylvanians to lose benefits

- USDA is considering a change to SNAP program rules that would eliminate Broad-Based Categorical Eligibility (BBCE)
- 47 states, including PA, use BBCE to help ease access to SNAP for low-income working families and many older adults and people with disabilities
- The Center on Budget and Policy Priorities estimates that more than 4 million people nationwide, and **310,000** in Pennsylvania, live in households helped by BBCE's higher income limits
- If eliminating BBCE affects a share of Southwestern PA residents proportional to their share of SNAP participants statewide, roughly **56,000** regional residents could lose benefits

Broad-Based Categorical Eligibility Helps SNAP Serve More Working Families and Others, Reduces Red Tape

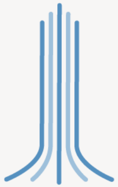
Helps working families by eliminating a benefit cliff when earnings rise



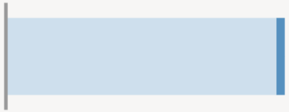
Provides food assistance to many older adults and others with incomes slightly above the poverty line

Lets people build modest savings for future emergencies and to help support themselves in retirement

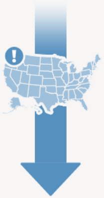
Streamlines SNAP for state agencies and families, and decreases workload for agencies



Does not contribute substantially to SNAP costs



Lowers state payment error rates by reducing complicated and resource-intensive processes



Southwestern PA

56,000 people

Live in households that benefit from BBCE's option to raise income limits, and could lose access to SNAP if the rule is implemented

Source: Center on Budget and Policy Priorities

7. Affordable housing

- Low Income Housing Tax Credit (LIHTC)
- HUD funding and programs

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H.R. 1 could modestly expand local affordable housing supply

- H.R. 1 will expand access to valuable 9% Low Income Housing Tax Credits (LIHTC) to stimulate affordable housing construction
- Housing advisor Novogradac projects that this will lead to 26,400 additional affordable units built in Pennsylvania over the next decade
- If Southwestern PA received its share of projected additional units based on its share of 2025 PA-wide applications, that would equate to **916 added units/year**
- If Southwestern PA received its share of projected additional units based on its shared of 2025 PA-wide awards, that would equate to **1,017 added units/year**

LIHTC applications to Pennsylvania HFA, 2025

Geography/Type	Applied	Awarded*	Not awarded
Pennsylvania: Low-income units	3,107	1,854	1,253
Pennsylvania: LIHTC	$125M	$65M	$60M
Southwestern PA: Low-income units	1,078	714	364
Southwestern PA: LIHTC	$38M	$23M	$15M

Source: Analysis of PA HFA and Novogradac data
**Includes "conditional" awards*

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Federal housing grants signal some areas of concern for HUD funding

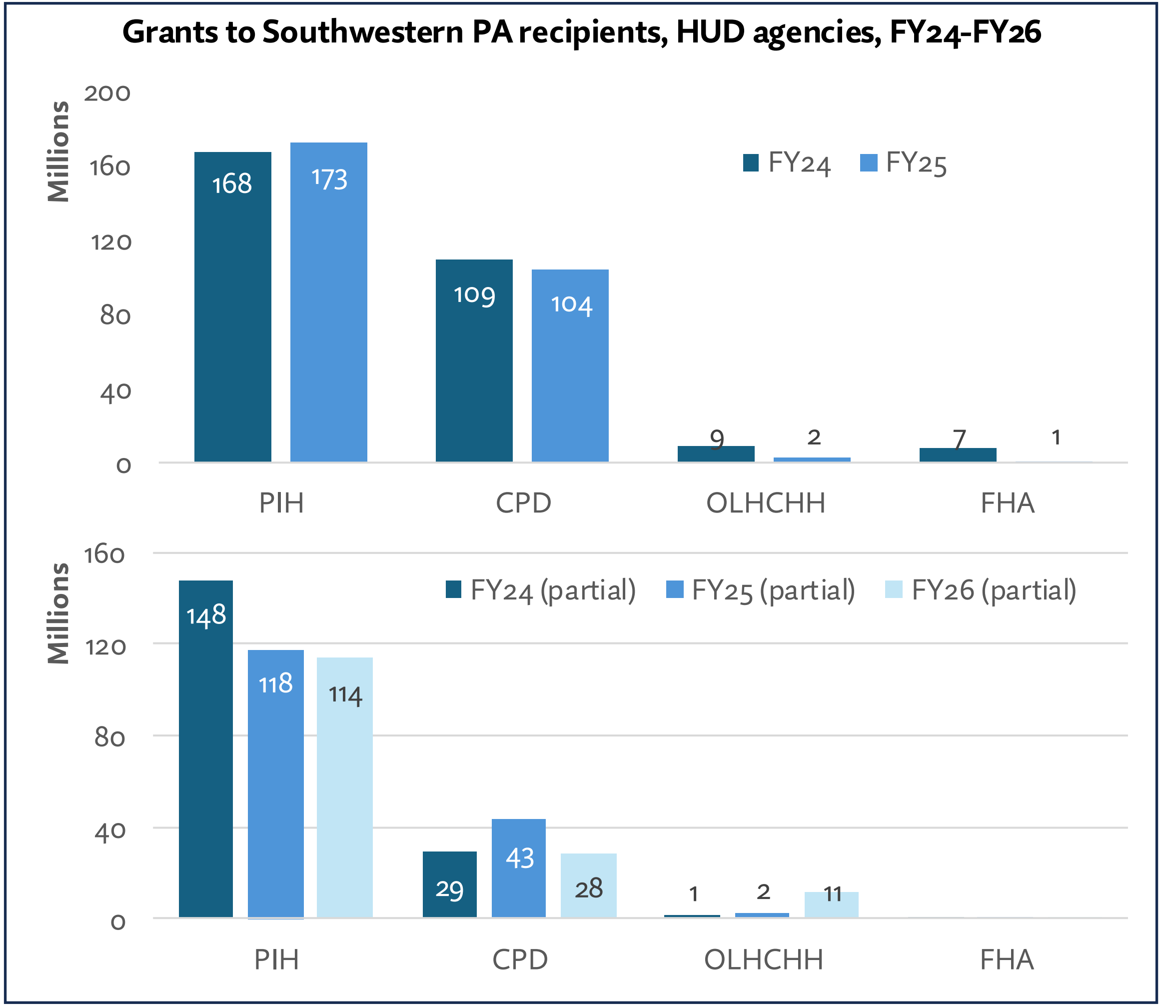
- While DOGE layoffs and administration-proposed budget cuts have targeted HUD, grant dollars for vouchers, public housing, and community development have continued to flow to Southwestern PA

- Funding from HUD's Public & Indian Housing and Community Planning and Development divisions to Pittsburgh-area recipients was stable from FY24 to FY25

- Grants for public housing and community development have declined somewhat in FY26; HUD appropriations reduced Public Housing Operating funds by about 15%

- Smaller Federal Housing Administration (FHA) grants for green retrofits and housing counseling have not continued under the Trump administration

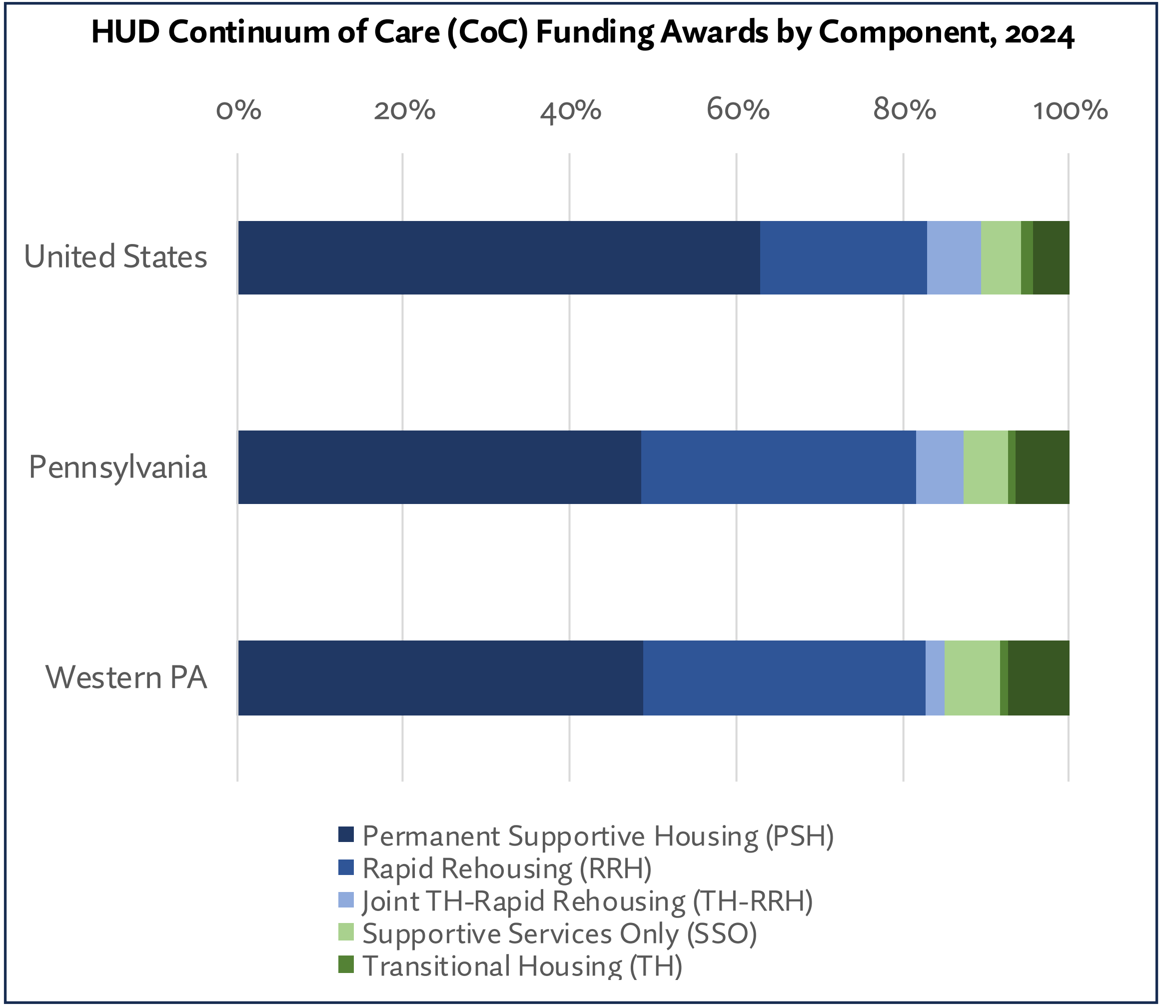
Source: USASpending.gov
Partial years include grants and subgrants issued through 6/20



The Trump administration is seeking to overhaul anti-homelessness funding

- The administration does not support "Housing First" approaches to preventing and alleviating homelessness, preferring transitional housing tied to treatment and work requirements.
- Most grants made through HUD's Continuum of Care (CoC) program—including to groups in SW PA—support evidence-based rapid rehousing and permanent supportive housing
- In June 2026, HUD issued a $4B CoC Notice of Funding Opportunity that would cap Housing First approaches to 60% of dollars, down from nearly 90% of awards in previous years. This could strip housing assistance from tens of thousands of formerly homeless people.
- The NOFO will likely face legal challenges and Congressional pushback in the coming months.

Source: HUD, Center on Budget and Policy Priorities



8. Immigration

- Foreign-born in context

- Unauthorized immigration

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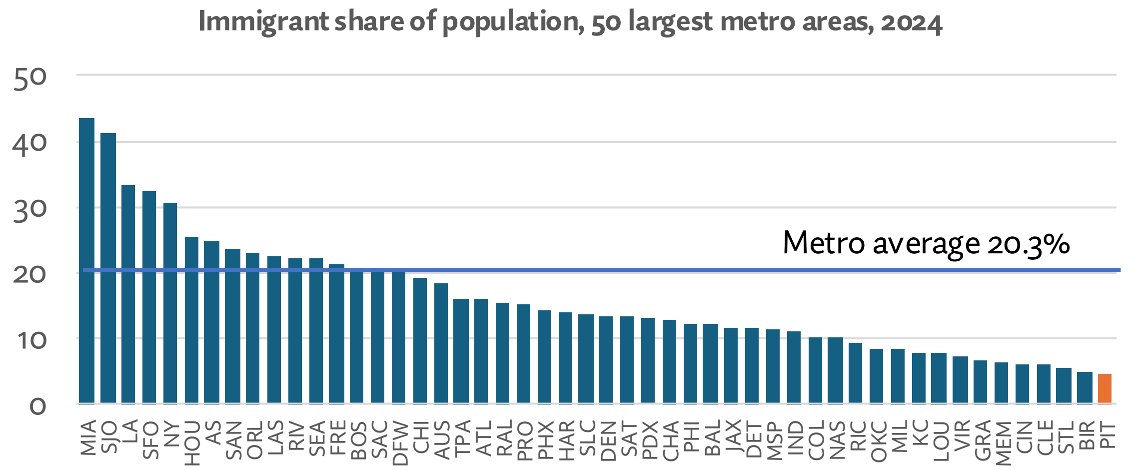
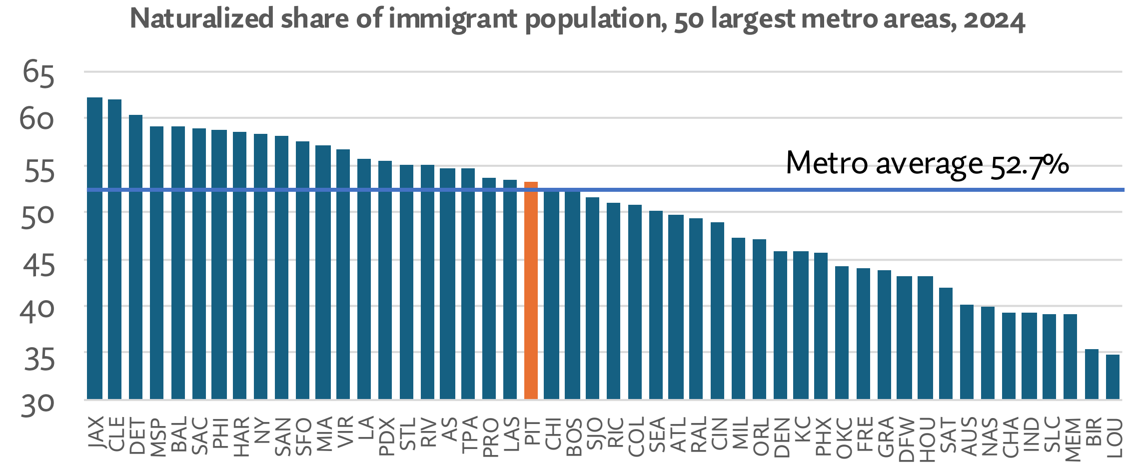
Greater Pittsburgh has a relatively small immigrant population

- In 2024, an estimated **111,000 foreign-born individuals** lived in the Pittsburgh metro area
- At **4% of the region's population**, Pittsburgh ranked 50th out of the 50 largest metro areas in the relative size of its immigrant population
- The region has a more typical share of its foreign-born residents who are naturalized U.S. citizens, at **53%.**
- This means that about **52,000** of the region's immigrants have some other status, e.g., legal permanent resident, temporary visa (such as H1-B or student), temporary protected status, refugee/asylum seeker, or undocumented
- Around **50,000 additional U.S.-born Pittsburgh-area residents** live with at least one immigrant parent



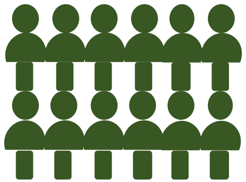


Source: U.S. Census Bureau data and American Immigration Council Map the Impact

Unauthorized immigrants in Allegheny County

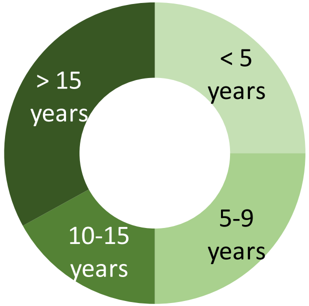
- The Migration Policy Institute develops local estimates of *unauthorized* immigrants: those who entered the U.S. without authorization and visa overstayers, as well as those who hold a temporary status (e.g., DACA, humanitarian parole, TPS) or with a pending asylum application
- Their latest (2023) estimates indicate that **12,000 unauthorized immigrants** live in Allegheny County. This represents **15%** of Census-estimated foreign-born residents, far lower than the **29%** national average
- About **one-third** of these immigrants have lived in the U.S. for more than 15 years
- The region's unauthorized immigrants are highly educated, and many own their homes. They are significant, often long-term contributors to the local economy

Unauthorized immigrants in Allegheny County, 2023



12,000

Estimated unauthorized immigrants in Allegheny County



33%

Lived in U.S. more than 15 years

56%

Possess a bachelor's degree

41%

Own their home

Source: Migration Policy Institute