

Special Populations

Pennsylvania Transfer of Wealth Study

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Background and Introduction

The Center for Rural Entrepreneurship has been retained by the [Center for Rural Pennsylvania](#) to update the Commonwealth's **Transfer of Wealth Opportunity (TOW)** analysis. Related to this project the Center has prepared a [series](#) of mini-reports focusing on unique factors that impact community TOW opportunities. This mini-report addresses the likely impact of **Special Populations**.

Question and Additional Information

Don Macke – Center for Rural Entrepreneurship
don@e2mail.org – 402.323.7336 – www.energizingentrepreneurs.org

Who is Included Among Special Populations?

There are many types of **special populations** that can impact the development of a community, wealth formation rates and TOW opportunity. Here are some relevant examples:

Amish. *Unique communities like the Amish, Mennonites and similar faith-based groups are a fixture in certain American communities. These groups are productive but somewhat insular. As a more insular group, giving tends to be focused within the core community, resulting in less potential for philanthropic giving to the larger community. This pattern can be found in other faith-based groups such as members of the Church of Latter Day Saints, Roman Catholic and certain fundamentalist religious groups. The potential for broader community legacy giving is more limited due to the cultural preferences and social norms associated with these groups.*

Safe Harbor Immigrants. *Safe harbor immigrants have been part of the American story for generations. Families from other countries with significant wealth seek to establish a residence in the United States due to political and economic uncertainty in their home countries. Cities like Miami, Los Angeles and New York are classic examples of Safe Harbor communities. Safe Harbor Immigrants typically have significant wealth and seek to become part of their adopted community often looking for ways of giving to become accepted and welcomed in their new homes.*

Refugees. *America continues to be impacted by refugees. This is particularly true during and following wars where there has been significant U.S. involvement. Often, foreign nationals who cooperated and supported the U.S. during these wars are afforded immigration opportunities. Initially, these refugees require assistance. However by the second and third generations, they are assimilated and often have household wealth profiles equal to or higher than the original residents of the community.*

Illegal Immigrants. *Illegal immigrants are challenged by their status to become assimilated. They are often exploited because of their status which challenges their ability to root and form estates.*

Knowledge Workers. *Where there are hubs of innovation, entrepreneurship and the knowledge economy, there is an attraction for knowledge workers. Both domestically and internationally, knowledge workers are typically better compensated and have a higher propensity for creating new entrepreneurial ventures rooted in commercialized innovations. Attraction and growth of knowledge workers can profoundly impact the rise of philanthropic potential in a community. A quick study of all the new foundations created in the Silicon Valley illustrates our point.*

Entrepreneurs. *A relatively small share of entrepreneurship is rooted in the high tech worlds of bio-tech, information-tech, green-tech and the like. Entrepreneurs most often take relatively common activities, like changing the oil in your car, and create new innovation and wealth around those activities. Communities that can grow and attract entrepreneurial talent are more likely to stimulate wealth formation.*

The impact of special populations occurs when their numbers increase significantly relative to the base population over a period of time. This pattern creates a divergence from historical trend lines and can increase or slow economic activity and/or wealth formation.

Why are Special Populations Important?

We explored the relationship between special populations and community development, household wealth formation and TOW opportunity in our descriptions above.

What Has Our Analysis Found?

We are not proposing to make any significant changes based on these factors in our base scenarios.

Supporting Research and Sources

The following analysis was developed by the Center for Rural Entrepreneurship using historic and current secondary research and informed by the Project's Technical Advisory Committee. For more information on this analysis, contact Don Macke at don@e2mail.org.



The Center promotes and sustains the vitality of Pennsylvania's rural and small communities by sponsoring research projects to identify policy options for legislative and executive branch consideration and action; collecting data on trends and conditions to understand the diversity of rural Pennsylvania; publishing information and research results to inform and educate audiences about the diverse people and communities of rural Pennsylvania; and participating in local, state and national forums on rural issues to present and learn from best practices.

Mary Kandray Gelenser – Center for Rural Pennsylvania – 717.787.9555
gelensermk@rural.palegislature.us – www.rural.palegislature.us