

BEYOND THE HEADLINES

An Executive Summary of Trends and Opportunities in Youth Mental Health in the U.S.

Executive Summary

This executive summary highlights key trends, challenges, and opportunities for youth mental health in the U.S., focusing on philanthropic investment and system building. The full report will be shared in the coming months. For questions, please contact Shruti Sehra, Managing Partner, at shruti sehra@newprofit.org.

Introduction The landscape analysis begins with the broader goals of the report. It explains why this issue is a priority and sets the stage for understanding key challenges and opportunities in the field. Essential Framing Core concepts that shape the analysis are introduced here. By examining systemic and contextual factors, the report highlights key lenses for interpreting the findings and understanding the nuances of youth wellbeing. Findings Major trends, challenges, and gaps in the youth mental health ecosystem are synthesized into clear insights. The research reveals the current state of youth mental health,

Youth Mental Health Organizations and Philanthropic Funding

A map of nonprofit organizations working in youth mental health is presented alongside an analysis of philanthropic funding distribution. By highlighting funding gaps, this section illustrates where financial support is most needed.

<u>Recommendations</u>

identifying both areas of progress and opportunity.

The report concludes with recommendations for funders, policymakers, and organizations seeking to address youth mental health. Actionable steps focus on creating a better youth mental health ecosystem.

<u>Appendix</u>

Additional details regarding definitions, methodology, and statistics.



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Introduction



Background and Purpose

New Profit, a nonprofit venture philanthropy organization, backs breakthrough social entrepreneurs expanding access and opportunity in the U.S. Youth mental health is a critical component of our strategy across Education, Economic Mobility, and Democracy. For our Education Strategy, we think about youth mental health as advancing the wellbeing of students, educators, and families. Our youth mental health work to date has supported early-stage organizations in expanding access to culturally responsive mental health care, particularly for those furthest from access. Through our Catalyze support model, we have invested \$1.6 million in 16 early-stage mental health nonprofits and are preparing to provide the next cohort of eight organizations with \$880K. In addition to funding, we provide peer learning communities, coaching, and strategic advisory support to help organizations navigate barriers to growth and scale their impact. Beyond direct investment, we focus on strengthening the broader field by convening new and interested mental health funders and leaders, joining discussions, fostering collaboration, and shaping philanthropic investment strategies that drive meaningful, community-centered impact. As we look ahead, we aim to expand our investment strategy to include organizations ready to scale and deepen their impact, ensuring youth mental health solutions are sustainable and widely accessible.

- Purpose of the Landscape Analysis: This analysis aims to illuminate the youth mental health field, providing critical insights to
 empower funders, policymakers, and mental health leaders to make informed decisions.
- **Building on our Work:** Over the past few years, New Profit has had the privilege of learning from remarkable social entrepreneurs and mental health leaders. As we look to deepen our impact, this analysis, conducted in partnership with the human-centered design firm, People Rocket, builds on work completed by our peers with a focus on access to ensure we navigate the youth mental health space responsibly and with intention.
- **Mental Health as a Foundation:** Mental health is integral to achieving success in New Profit's strategic focus areas: Education, Democracy, and Economic Mobility. Addressing mental health challenges strengthens individual and collective outcomes across these domains.

Understanding the Youth Mental Health Landscape

Emerging from the COVID-19 pandemic, youth mental health has come into the spotlight. Even before the isolation of the pandemic, the former U.S. Surgeon General, Dr. Vivek Murthy, warned of a "loneliness epidemic" contributing to a decline Americans' mental health. Indeed, youth mental health has been on the decline for decades. During the pandemic, youth mental health challenges, including depression and suicidality, intensified and contributed to a growing consensus that investment is needed at all levels, from families and communities to public and private sector institutions and policies, to support today's youth. Philanthropic organizations, in particular, have a unique opportunity to catalyze change by investing in innovative, community-driven, and proximate solutions that address systemic barriers to care, reduce stigma, and foster resilience in young people.

In order to make progress, it is imperative that we have a nuanced understanding of the diverse range of challenges faced by youth today and the opportunities for intervention and impact. New Profit undertook a novel landscape analysis of youth mental health in the United States, which is focused on understanding both the state of youth mental health today and the landscape of nonprofits and their funders across the country that are focused on addressing youth mental health as part of their mission or core activities.

It is our hope that this work can help to move the field forward by adding nuance to the headlines around youth mental health, making visible the gaps in investment and access to critical services and supports, and shining a light on the good work that is already being done to support youth mental health in communities across the United States.

Methodology

This analysis incorporates data from industry and academic publications, expert interviews, and a novel analysis of youth mental health nonprofit organizations in the United States using IRS Form 990 data.

300+ Landscape Documents

A review of academic articles and industry reports was conducted to better understand the youth mental health landscape, ensuring both depth and breadth. Findings from this review informed the design of interview protocols and the development of search criteria for identifying relevant organizations.

The review focused on identifying key trends, gaps, challenges, and opportunities within the field, providing a foundation for a series of semi-structured interviews to investigate these areas further.

Over 20 Stakeholder Interviews

Semi-structured interviews with knowledgeable stakeholders were conducted to deepen understanding of the youth mental health field and to investigate a set of working hypotheses about the field's key dynamics and opportunities. These conversations provided context and insights, grounding the analysis in lived experiences and expert perspectives.

Quotes included in this document are drawn directly from these interviews but have been anonymized to ensure confidentiality and encourage candid input.

Almost 7,000 Organizations

Terms and phrases identified through the review of landscape documents and interviews were used to guide the analysis of publicly available IRS data.

These insights informed the search criteria, enabling the identification of nonprofit youth mental health organizations and their funders.





Essential Framing

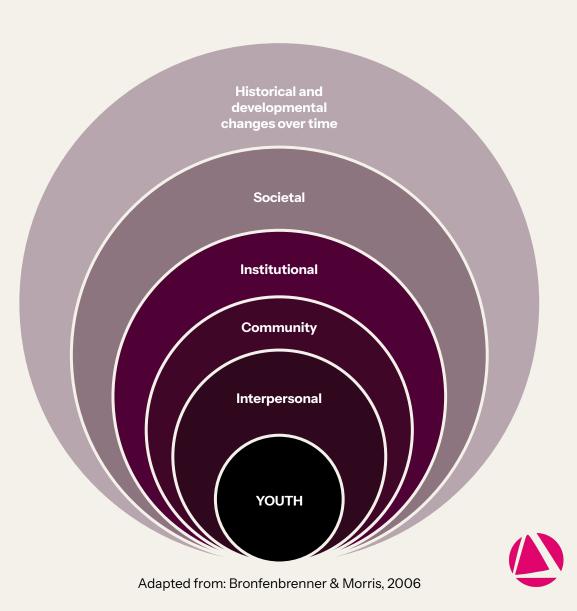


An Ecological Model of Youth Mental Health

While mental health is often confined to its own field within the health sector, youth mental health impacts and is impacted by the entire ecosystem surrounding a young person, including:

- their **individual** biology, identity, and developmental stage
- their closest relationships (including parents' mental health)
- the **communities** and **institutions** with which they interact (e.g., schools, youth programs, religious institutions, social services, employment)
- the policy environment (e.g., insurance and economic policies, local state, city, and school board policies)
- the larger **macro-trends in our society** that impact our norms, values, and societal culture (e.g., technological advances, income inequality, racial and gender inequality, political polarization, climate change).

A systemic approach to addressing youth mental health would include attention to the influences of the entire ecosystem on the wellbeing of youth.



Relationships Are at the Core

- Healthy youth development and mental wellbeing requires a sense of purpose, connection, agency, motivation, and self-efficacy. According to recent research from Harvard's <u>Making Caring Common</u>, youth (and particularly young adults who are struggling at even higher rates than teens) report a lack of meaning or purpose, financial worries, and achievement pressure as the main contributors to their mental health challenges. Youth also report higher levels of loneliness than any other age group.
- Relationships mediate the influences of a young person's ecology. Close <u>developmental relationships</u> help youth to buffer sources of stress and build resilience, make sense of their world, develop agency, connect to resources, and feel that they matter.
- Therefore, a guiding question for *all* stakeholders in this work must be:
 - In what ways does this [practice/program/ policy/environment] encourage, enrich, and empower the developmental relationships around youth? (<u>Simple Interactions</u>)
 - Alternatively, are there obstacles that are discouraging, diminishing, or disempowering relationships for youth that need to be addressed or removed?

"What are the two things that are going to be most core to teenagers and young adults mental health? I think the answer [to] that question...would be having meaningful, gratifying relationships with people and feeling some meaning and purpose in your life. And I don't mean having a single purpose or a calling. I just mean having things you value that you can pursue...things you care about, that you can pursue."

-Interviewee

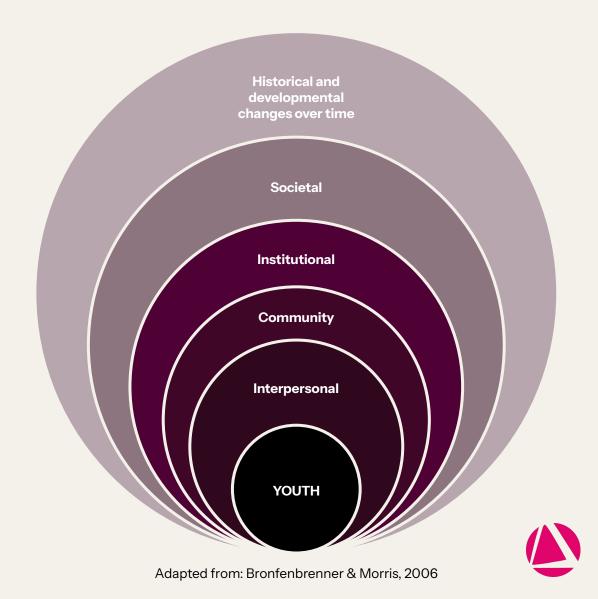


Leveraging the Ecological Model

Taking an ecological perspective allows us to see nuance, complexity, context, and interdependence, which informs a systemic approach to impact.

- Context matters when trying to understand the causes of mental health challenges and design solutions. Rather than solving a generic "youth mental health crisis," we need to be asking the question "what [specific mental health challenge] are we addressing and for whom"?
- Race, class, and culture impact how young people experience their ecosystem and the resources and opportunities available to them at all levels.
- Mental health also impacts more than just individual wellbeing youth mental health impacts and is impacted by access to high quality education, a functioning democracy, economic mobility, and more.
 There is almost no sector that does not have a role to play and a stake in the game when it comes to youth mental health.
- For funders and practitioners, it's about seeing the system as a whole, and our part within it. It's about connecting the dots to create entire systems of support around youth.

How might we build coalitions across all ecological systems and sectors with improving youth mental health as the common goal?



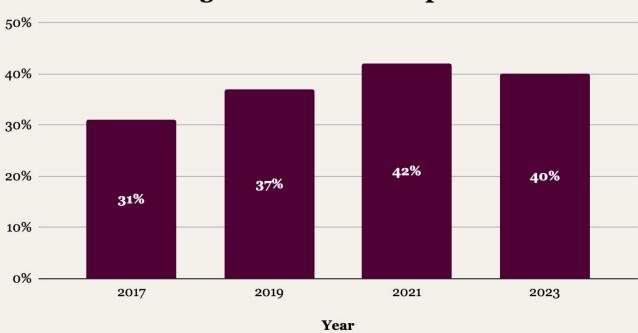
Findings



COVID Shone a Light on What Was an Ongoing Decline in Youth Mental Health

The pandemic exacerbated existing mental health challenges among many - but not all - U.S. youth, amplifying the demand for services and bringing attention to the gaps in the current system. There is no "single story" of how the pandemic impacted youth mental health—some studies show increasing rates of anxiety, depression, eating disorders, and suicidality among certain subgroups, including girls and youth of color (e.g., Bridge et al., 2023; Pritchett et al., 2024; Yard, 2021), while others indicate little-to-no change and a return to pre-pandemic levels (e.g., Brunette et al., 2023; CDC, 2024). However, regardless of the pandemic's effects, data shows a decline in youth mental health over time. For some, school closures removed stressors such as bullying, peer social pressure, and academic achievement demands (Penner et al., 2021), while those who maintained close social connections virtually reported better mental health outcomes (Jones et al., 2022). At the same time, the pandemic may have brought greater public attention to youth mental health, amplifying conversations that were previously overlooked or deprioritized.

Percentage of High School Students Who Experienced Persistent Feelings of Sadness or Hopelessness



Data source: Centers for Disease Control and Prevention. Youth Risk Behavior Survey Data Summary & Trends Report: 2013–2023. U.S. Department of Health and Human Services, 2024.

The Landscape Before and After COVID

COVID shone a light on a failing youth mental health system and led to a surge in new organizations, funding, and prioritization. The table below provides a view of the number of nonprofit organizations in our analysis focused on youth mental health and their funding flows before the pandemic (2019) and as of 2022. Despite growth, systemic inadequacies persist.

	Before the Pandemic (2019)	As of 2022
Number of Nonprofit Organizations	~5,000	~7,000
Contributions from Private Foundations	~\$137M	~\$500M
% of Giving from Private Foundations	0.32%	0.43%

Jump to the following section to see how these figures were calculated: Youth Mental Health Organizations and Philanthropic Funding



Lack of Access and Unequal Access to Youth Mental Health Care

Inequality in access to mental health care is an enormous challenge. There are both not enough providers and numerous barriers to seeking out and accessing care.

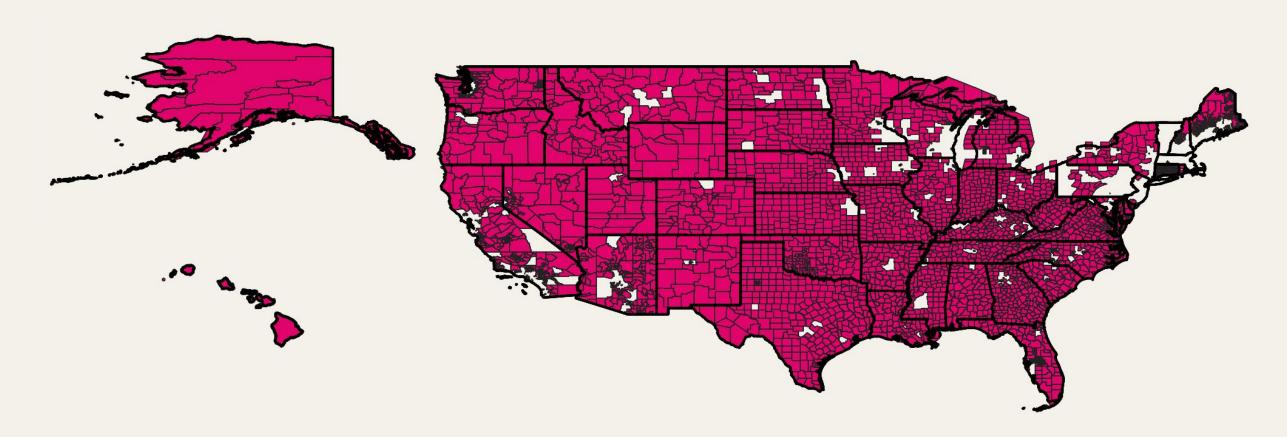
- In 2023, almost 60% of youth with depression did not receive any mental health treatment (Mental Health America, 2024).
- As of December 2023, more than half of the US population lives within a Mental Health Professional Shortage Area (defined as a population to provider ratio of 30,000 or more to 1), with rural areas particularly affected. It is predicted that these shortages will continue or get worse over the next 10+ years (National Center for Health Workforce Analysis, 2023).
- Disparities are evident in both access to services and quality of care, with historically underserved communities, particularly
 youth of color and rural youth, facing more barriers. This is compounded by a lack of culturally competent care and a dearth
 of diverse practitioners.
 - Youth of color report that practitioner cultural understanding is most important to them in their willingness to engage in mental health care (Chu et al., 2022).

It is critical to both remove access barriers and build a diverse, culturally responsive mental healthcare workforce.

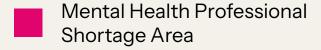


Scale and Extent of Professional Shortages

More than half of the U.S. population lives in a mental health professional shortage area. While there is also a primary care professional shortage, the mental health professional shortages are more extreme.



Legend

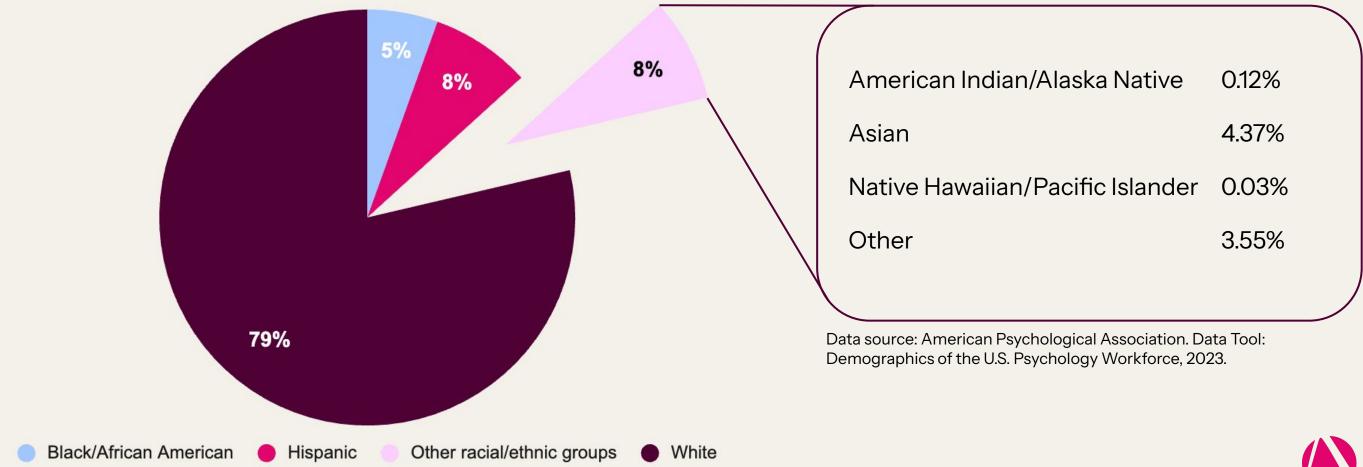




Mental Health Workforce Demographics

The US Psychology workforce is 79% white and 72% female. For many youth, this means lack of access to a provider with a shared background or identity.

Percent of Psychologists by Race/Ethnicity





"It's not just about one tool or model. We need a whole system of supports that can adapt and connect, from peer support to tech innovations to school-based care."

INTERVIEWEE



There is a Need and Opportunity for Designing a Range of Care Models

Part of removing barriers is understanding that, when it comes to youth mental healthcare, there is no one-size fits all. We need a range of responsive approaches to treatment and care that are tailored to young people's needs and developmental stage (as opposed to simply mimicking adult models).

- Collaborative and integrated care models have been shown to increase access to care and improve adolescent depressive symptoms. Similarly, studies show that family therapy models are effective in treating youth mental health and behavioral disorders. That said, the research does not point to these forms of care being better overall it will depend on the context (Asarnow et al., 2005; Hopkins et al., 2017; Jiménez et al., 2019; Richardson et al., 2014; Wright et al., 2016).
 - One interviewee shared, "I think, as with all of mental health, much of [the treatment approach] depends on the individual who is struggling. Some do better with individual focus. Others do better in groups."
- Benefits of collective care include that it helps build social support networks and can provide scalable care. However,
 concerns have been raised about the complexity of relationships within these groups, particularly for youth whose
 multifaceted identities and experiences may not be fully acknowledged and accepted amongst group members. While
 some papers emphasize the benefits, others caution against over-reliance on these approaches, pointing out the need for
 personalized care and cultural sensitivity to avoid alienating individuals within the group.
- Addressing the root causes of youth mental ill-health (e.g., poverty, isolation, housing insecurity, trauma, toxic stress) from a multigenerational perspective is also critical (McGorry et al., 2024).

"It does not have to be therapy to be therapeutic."

INTERVIEWEE



Mental Health Care Can Extend beyond Traditional Therapy

Community-based interventions, peer support, arts, and digital tools can all provide therapeutic benefits, presenting a broader, more accessible approach to mental health. This idea shifts perspectives from a medicalized view of mental health to a model where everyday activities and community connections also play vital roles.

- Non-traditional approaches can be more accessible and relatable, particularly for youth who might not engage with traditional therapy.
- Building supportive, youth-centered environments includes the expansion of digital health tools and community-based services that provide accessible mental and behavioral health support and opportunities for healthy connection and engagement outside traditional clinical settings.
- Interventions that help youth to form strong, supportive relationships, find meaning or a sense of purpose, manage or mitigate stressors in their environments, and feel competent and agentive can all be seen as addressing root causes of youth mental health.
 - One expert shared, "How do you help kids develop meaningful relationships? How do you help them do things that are meaningful? I'm very big on service these days and collective service, working together. Because I think it helps with loneliness; helps with meaning and purpose; it helps with anxiety and depression for young adults."



"So I think what we need to look at is not banning kids from social media or the digital ecosystem, but empowering them with the knowledge of how to use this power tool and to recognize it as a power tool, not as a toy, not as a playground, but as a tool that can do great good or great harm."

INTERVIEWEE



The Technology Paradox

Social media, screen time, and digital platforms can contribute to anxiety and depression, but they also offer avenues for support, connection, and innovative therapeutic interventions.

- Research and interviews emphasized the need for a balanced approach, ensuring that digital platforms are used effectively
 and safely to support youth mental health (Weinstein & James, 2022). Technology has the potential to be useful for:
 expansion of access to services via telehealth; coordinating care; offering additional supports; and providing digital peer
 support and community.
- Social media can exacerbate mental health issues like depression, anxiety, and low self-esteem, particularly through cyberbullying, negative social comparison, and excessive screen time. The negative impact is especially pronounced for girls (Achterberg et al., 2022; Boers et al., 2019; Brunette et al., 2023; Odgers & Jensen, 2020; OSG, 2021; Orben & Blakemore, 2023; Twenge & Farley, 2021; Twenge et al., 2022; Usborne & Taylor, 2010).
- But, as our interviewees shared, nuance is necessary. "There's mixed findings... some studies show positive impacts, especially for youth from marginalized backgrounds... [who] get a sense of belonging from some online spaces." For LGBTQ+ youth, "it's a lifeline."

Singular narratives that point to technology as the sole cause of youth mental health problems lead to overly simplistic and single-minded solutions (e.g., simply banning or restricting youth's access to technology), rather than taking a nuanced approach that identifies root causes, teaches healthy tech habits, and leverages the potential benefits of technology in service of those who need it most.

"I think something that's really important is to consider the factors that are driving youth to go on their phones and breed that disconnection. And maybe [it's] not as much that the phones are the root cause of that disconnection. I think that, in so many situations, youth are turning to their phones because there's not space to [connect] otherwise."

YOUTH INTERVIEWEE AND TEEN MENTAL HEALTH RESEARCHER

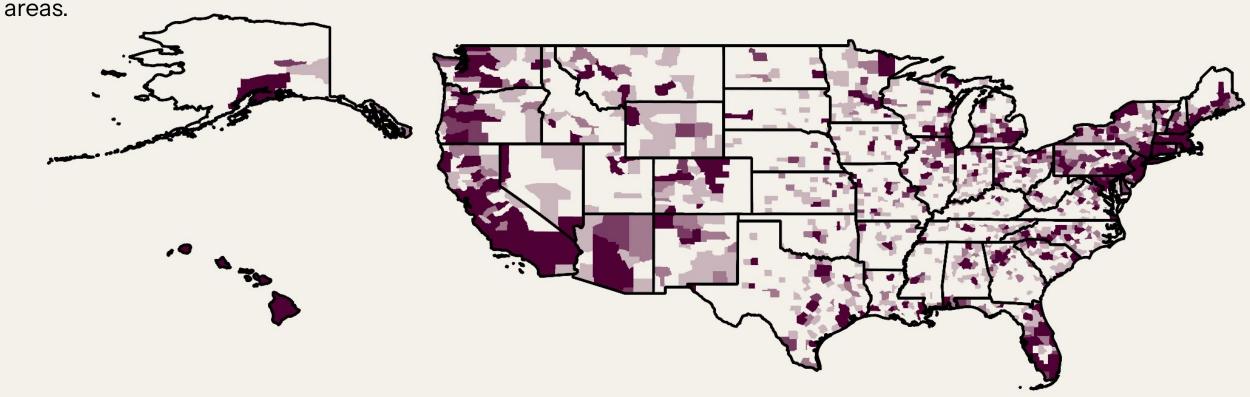


Youth Mental Health Organizations and Philanthropic Funding



Youth Mental Health Organizations

The heatmap provided below illustrates the relationship between population and number of youth mental health organizations at the county level. Even when accounting for population disparities, much of the United States has limited access to the youth mental health ecosystem. This represents a key opportunity for social entrepreneurs and philanthropic leaders to support these



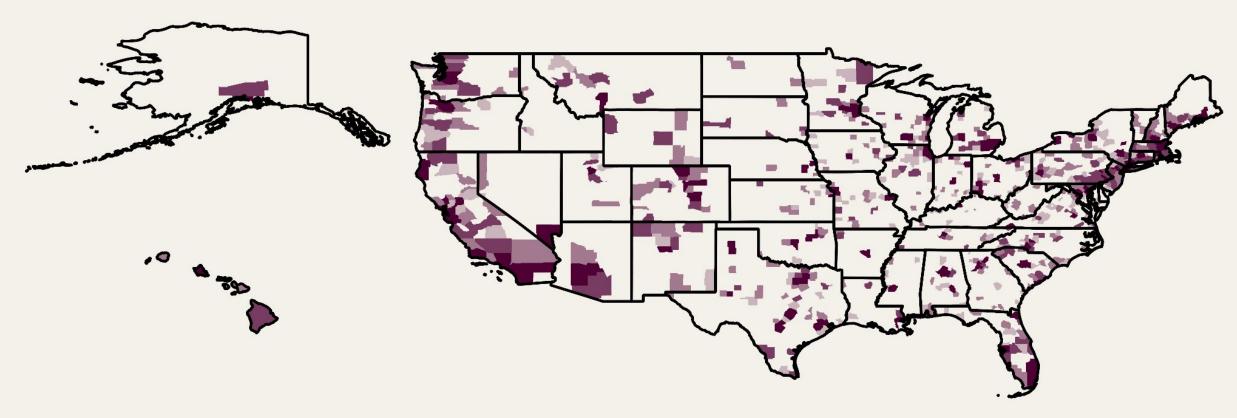
Number of Youth Mental Health Organizations

0	1	2	3	4+
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Youth Mental Health Funding

When we look beyond the organizations and examine the funding flows, we see the same underlying theme amplified. The flows are even more concentrated, presenting funders with a critical opportunity to refine their funding strategies to support emerging opportunities in low-access areas.



Concentration of Funding



Tensions Related to Philanthropic Funding

Funding remains a complex issue, with many youth mental health initiatives, particularly smaller, proximate, and community -based organizations, struggling to grow beyond a certain level due to a lack of sustained, long-term funding. While there has been an increase in philanthropic interest, the focus often leans towards short-term wins, rather than systemic change.

Short-Term Philanthropic Support vs. Long-Term Sustainability

Short-term funding from philanthropic organizations is crucial but creates tension between immediate resource needs and long-term sustainability. When initial funding ends, many mental health programs struggle to continue, leading to instability and discontinuity in care. Many organizations are dependent on relatively small grants (e.g., \$100k-\$200k), which makes it difficult for them to plan long-term and expand their services.

Short-Term Wins vs. Long-Term Investments

Funders and policymakers often prioritize initiatives with immediate results, like crisis intervention and short-term therapy. This creates tension between seeing fast impact and investing in long-term solutions, such as prevention, early intervention, and systemic change. Many funders are perceived as cautious, which can prevent innovative, early-stage nonprofits from getting the necessary backing to scale.

Funding Priorities vs. Duplication and Coordination in Mental Health Initiatives

The mental health system is fragmented, with funders often supporting similar initiatives without coordination. This creates tension between the need for a cohesive, effective support system and the reality of individual funders wanting to move quickly and fund causes they care about. This leads to duplicate efforts, inefficiencies, and uneven support.



What Does it Take to be a "Top" Funder?

Our analysis indicates that there are more than 6,000 private foundations making contributions to youth mental health organizations. Fewer than 100 of these funders account for 50% of the total giving to youth mental health organizations.

Funding Ranges	Number of Funders
\$5M or More	10
\$1M - \$5M	74
\$500k - \$1M	86
\$100k - \$500k	560
Less than \$100k	5,575

The average contribution amount is ~\$23k.



Recommendations



Recommendations to Strengthen Services

These recommendations focus on building the mental health care system to meet the needs of youth.

Enhance Access to Services	 Invest in Building a Diverse, Culturally Responsive Workforce Expand Digital and Telehealth Services Responsibly Enhance Crisis Intervention Services Simplify the Referral System Continued Training for Primary Care Clinicians Focus on Prevention and Early Intervention
Improve Coordination and Integration	 Create a Framework of Connectedness Enhance Post-Hospitalization Support Coordinate Care Across Systems Increase Cross-Sector Collaboration Support Transition-Age Youth
Measure What Matters	 Improve Data Systems Enhance Data Collection and Analysis Methods Strengthen the Research and Practice Community Increase Funding for Innovative Approaches to Evidence-Building Translate and Share Knowledge



Recommendations to Strengthen Ecosystems

These recommendations focus on strengthening the ecosystem surrounding youth so that it supports their wellbeing.

Build Youth-Centered Environments	 Support Educators and School Staff Foster Youth Identity, Agency, and Resilience Address Bullying and Cyberbullying Create Safe and Supportive School Climates Focus on Relationships Adopt a Youth-Centered Approach
Support Families and Communities	 Provide Parental Education and Support Deliver Services by Parents for Parents Provide Planning Assistance Help Young People Belong and Connect Normalize Mental Health Conversations Increase Public Awareness Campaigns
Eliminate Barriers & Address Root Causes	 Address Socioeconomic Barriers Recruit and Retain Ethnically Diverse Staff Develop Specialized Programs for Underserved Groups Emphasize Inclusive and Culturally Responsive Practices Focus on Root Causes Reinvent Institutional Structures



A Call to Action for Philanthropy

Philanthropy has multiple levers at its disposal to make a crucial difference for youth mental health. The following recommendations are a call to action for philanthropy to step up, fill gaps, and help to catalyze the efforts of organizations and social entrepreneurs doing the essential work of creating ecosystems where all youth can thrive.

- **Co-design with youth:** All too often, priorities are set and solutions are developed without the input of youth, who are most proximate to the challenges and opportunities impacting their mental health. Ensure youth are at the table to co-create solutions that are responsive to their lived realities.
- **Invest in proximate organizations and social entrepreneurs:** Organizations on the ground, in communities, that understand and incorporate the lived experience of those they serve into their programming are uniquely positioned to make an impact on youth mental health. This requires long-term, sustained investment and capacity building.
- Leverage philanthropy's convening power: Bring folks together to coordinate stakeholders across the ecosystem, share
 innovative ideas, invest in systems building, and shine a light on the good work being done in communities across the U.S.
- Support effective policy development: Local, state, and federal policies can promote or inhibit growth in the mental health sector, and there are people working at all levels of the system to have an impact. States are finding innovative ways to establish sustainable financing for mental health, including coverage for mobile crisis services.
- **Fill gaps:** While government funding is essential and has traditionally made up the majority of funding for mental health services, given the current policy landscape in the US, philanthropy will be increasingly critical to ensure care is available to all, particularly sub-groups losing access to specialized care, such as LGBTQ+ youth. Interviewees also shared the challenge of leveraging public dollars to support new, innovative programs with the potential for high impact, which is a key place where philanthropy can step in.
- Catalyze new knowledge: Invest in building the evidence base by funding new research and innovation in the field, with a particular focus on the translation of research to practice and raising up local funds of knowledge.
- Engage in system-building across all of the above!



Appendix



How Do We Define 'Youth Mental Health'?

What do we mean by youth?

 Youth can encompass a large developmental range, including both the adolescent and young adult stages. The field of youth mental health broadly defines youth as those from 12-25 years (McGorry et al., 2024).

What do we mean by mental health?

- Youth mental health refers to the emotional, psychological, and social wellbeing of young people, shaped by their lived experiences and the environments they inhabit.
- For the purposes of this report, we also include behavioral health under the umbrella of youth mental health, which refers to "behaviors and actions that affect wellness" (CDC, n.d.). This includes substance use and addiction.

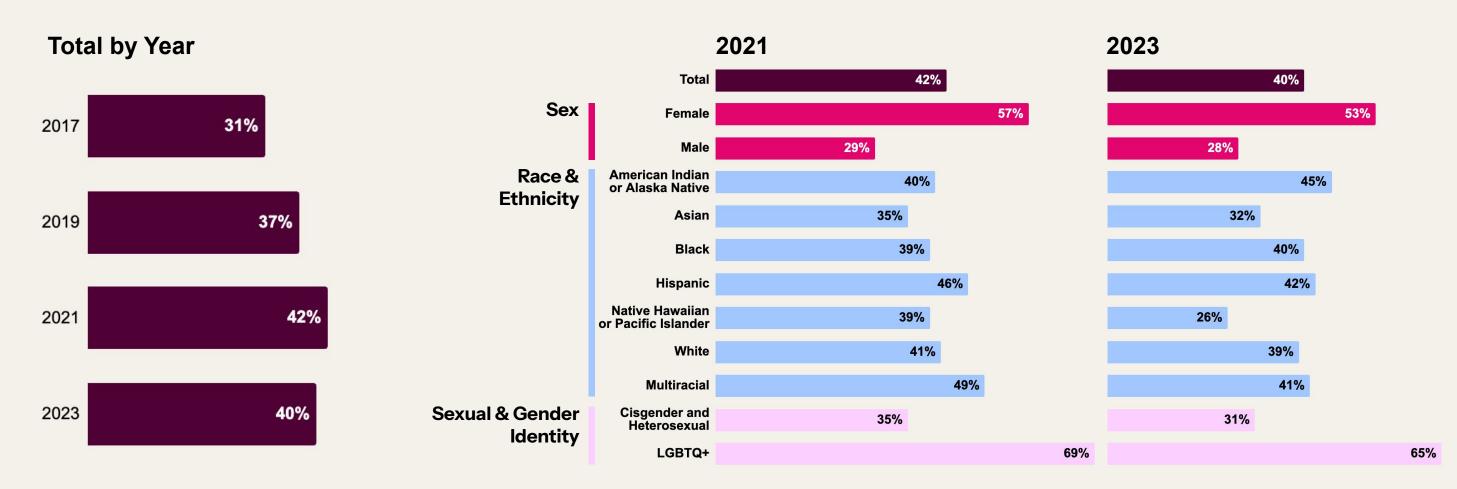
What encompasses youth mental health?

- The state of Youth Mental Health is a multifaceted issue that is influenced by both individual psychology and behavior, and broader societal factors such as socioeconomic status, race, gender, family dynamics, educational pressures, access to healthcare, technology innovations, and world events.
- Mental health can encapsulate a wide spectrum, from concepts of wellness and wellbeing to a host of diagnosed mental illnesses.
- Mental health and mental illness are understood differently across cultures and communities, as well as across generations and within families.



Youth Mental Health Trends

The graphs below show the percentage of high school students in the United States who experienced persistent feelings of sadness or hopelessness during the past year, by demographic group during and after COVID. Though rates begin to decrease, they remain alarmingly high, particularly for females and LGBTQ+ youth.

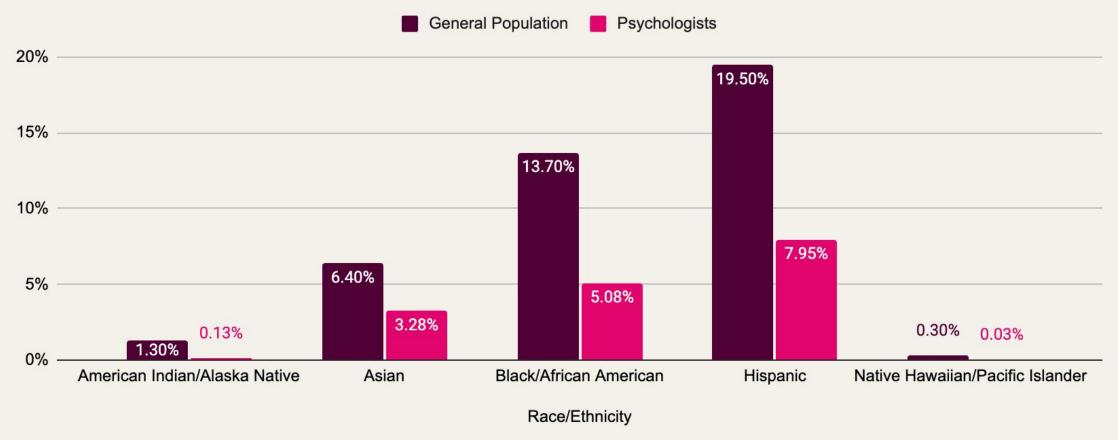




Disparities in Mental Health Workforce

When comparing Race/Ethnicity between the general population and the psychology workforce, disparities emerge, highlighting the urgent need to make the mental health workforce more representative.

Percent of General Population and Percent of Psychologists





Novel Analysis Approach

Overcoming the limitations imposed by rigid classification systems

Create dataset: procure millions of IRS Form 990 filings for nonprofit organizations and private foundations that contain descriptive programmatic and grant information.

- Develop bag of words search terms: synthesize findings from desk
 research and interviews to create a set of terms that can be used to identify youth mental health nonprofits and their funders.
- Identify Organizations: complement existing classification systems
 by applying the bag of words search terms to programmatic descriptions to establish a set of youth mental health nonprofits.
 - **Identify funding flows:** identify the private foundation funding source and amount by checking the grant recipient information provided by the private foundation.

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