

BOOSTING UPWARD MOBILITY

A PLANNING GUIDE FOR LOCAL ACTION

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STEP FOUR

Build Your Coalition for Systems Change

Creating and sustaining the conditions for boosting people out of poverty requires an all-hands-on-deck approach.

Developing your own Mobility Action Plan (MAP) will require you to engage not only other government stakeholders but also external stakeholders whose unique perspectives on community challenges and work across the systems that hold poverty and inequity in place can help you identify and implement the right strategic actions. This is why one of our planning principles is **partnerships with cross-sector actors across policy domains** and why we've emphasized the roles of nonprofit, philanthropic, anchor institution, and private-sector partners throughout this guide. Indeed, one of the chief values of having external partners is that they can help ensure the work will continue beyond the span of a single county executive, council, or mayoral administration.

The fact that poverty persists in the US and that inequities continue to widen in many communities means significant reforms are necessary for reshaping the institutions and systems that affect residents' lives. Bringing about **systems change**—a fundamental shift in practices, underlying values, or norms by local actors that reshapes policies, processes, funding, relationships, and power structures—requires partners to think, act, and collaborate differently than they may have before. Places that make only small program or policy adjustments but otherwise maintain the status quo will likely find their approach insufficient for truly boosting mobility from poverty.

Of course, change for change's sake is unlikely to win many allies, and it won't necessarily boost mobility or advance equity. Systems change should be motivated by the fact that status quo policy approaches have not led to better outcomes for people or communities. Although not every partner will be committed to systems change, all should be invested in improving communities. With that in mind, partners in this work should be prepared to find common ground with organizations with differing ideas of what or how big changes should be.

This section offers a guide to building a cross-sector team capable of creating systems change and boosting mobility from poverty in your community. Moving forward, we'll call the group responsible for executing the mobility action planning process (and some of the MAP strategic actions) the Mobility Coalition. Your Mobility Coalition should expect to spend anywhere from six months to two years on the Mobility Action Planning process (each county in the Upward Mobility Cohort spent between 18 and 21 months developing its MAP). The Mobility Coalition may also decide to keep meeting *after* the MAP has been released to continue coordinating around strategic action implementation, monitoring progress toward goals, and conducting continuous learning and evaluation activities. This section, however, focuses on the responsibilities of the Mobility Coalition during the Mobility Action Planning process.

Coalition members may be involved in the following activities during the Mobility Action Planning process:

- Gathering and analyzing data
- Engaging community members to lift up priorities, analyze data, and contribute to developing solutions
- Interviewing key stakeholders to learn about best practices
- Gaining buy-in from local leadership
- Inventorying current programs, policies, and practices
- Developing communications and other outreach strategies
- Conducting policy research to learn about evidence-based solutions and best practices
- Identifying funding sources for potential strategies
- Drafting the MAP
- Disseminating the MAP among their partners and with community members with whom they work

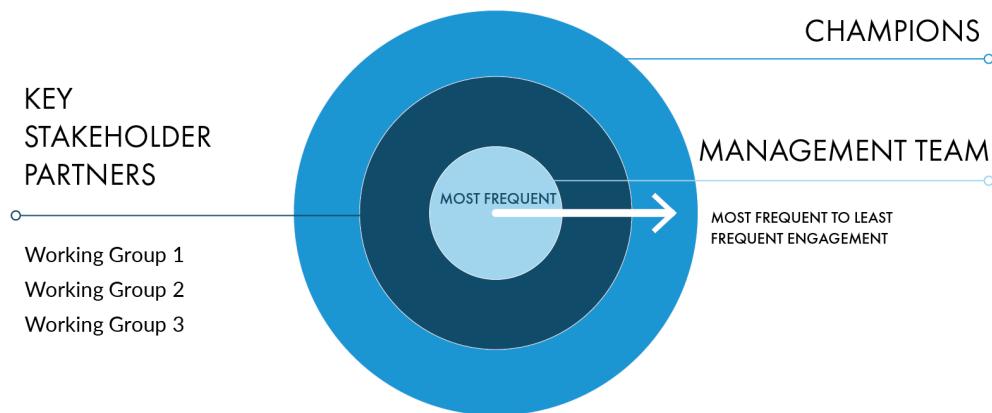


Figure 6: Sample Mobility Coalition diagram

Your Mobility Coalition will be made up of three groups:

1. The Management Team
2. Key Stakeholder Partners
3. Champions

The exact structure of your Mobility Coalition will vary according to the needs of your work. However, the image above with concentric circles demonstrates the frequency at which you should engage each of these groups: the management team is central to the work and will meet most frequently, while the champions are tertiary partners who should be engaged the least frequently (but still at critical junctures in the work). The section below contains more information on each of these groups.

Step 4.1 Assemble the Management Team

Gathering your management team is the first step in forming the full Mobility Coalition. The management team can be composed solely of government staff, but you might also engage consultants or people from partner organizations to fulfill some of these roles. Ideally, anyone you recruit will have relevant experience and the connections, authority, and access to information required to advance the work. Below, we describe some of the key roles that make up the management team and discuss why you might invite external partners or consultants to play some of these roles.

Project Manager

The Project Manager is the operational lead of the entire Mobility Coalition and is responsible for developing the workplan, identifying and liaising with the various working group leads, making sure everyone follows through on their commitments, and troubleshooting challenges. They do not necessarily need to be a government employee, but if a nongovernment person is identified to be the right project manager for the work, they will need the authority and information to lead from outside of government. The graphic below highlights some of the necessary qualities of a good project manager:

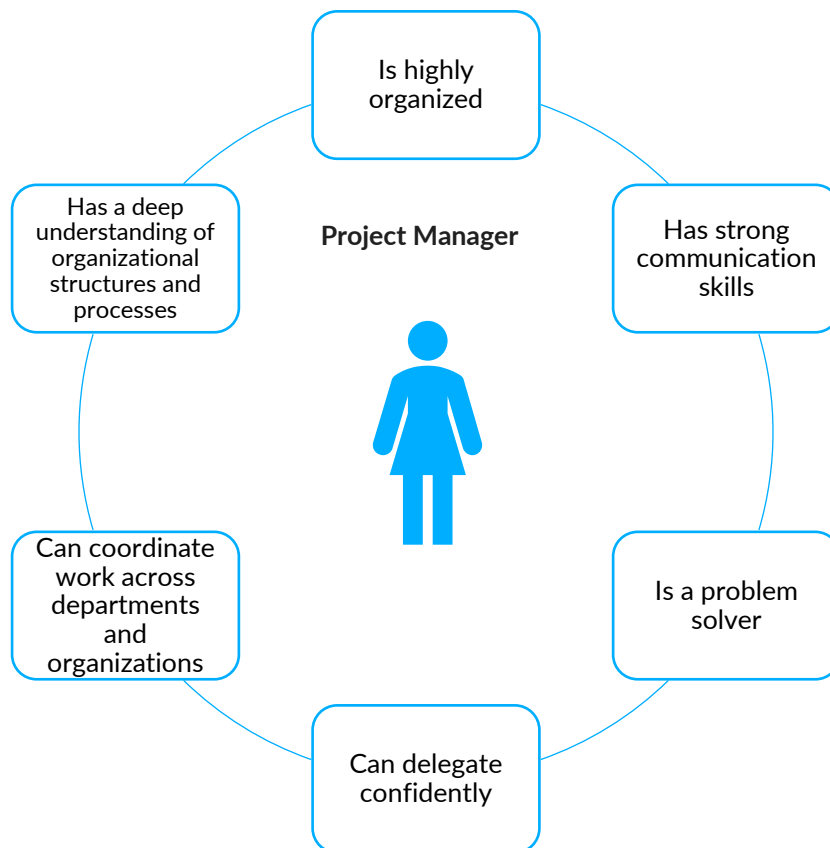


Figure 7: Qualities of a good project manager

Ideally, the person identified as the Project Manager for the Mobility Coalition will be able to devote a significant amount of their workload to the role. Managing many deliverables across departments and organizations requires significant dedication, capacity, and coordination.

Other Management Team Roles

In addition to the Project Manager, several other management team roles may be helpful in executing the core activities of this work. They can be fulfilled by government staff, but the local government may also decide to hire a consultant or engage an external partner. This is especially advisable in situations where no one within local government has time to manage aspects of the work or where an external partner might have better connections or assets.

The paragraphs below offer suggestions on what your other management team roles might be and which external partners might best fill them, should you choose not to have these positions located within government. (We would recommend that they not all be fulfilled by government staff so as to share power across different organizations in your community.) They are based on the roles in the Mobility Coalitions of the Upward Mobility Cohort. Although most of these functions are essential to the work, jurisdictions should consider how to operationalize them because local resources and capacities will vary.

Data Lead

The Data Lead will manage the collection, analysis, and visualization of data as well as the development of a mechanism for regularly gathering and updating data and tracking success metrics. This person should have experience with data disaggregation, using data for storytelling and community engagement, and with executing data sharing agreements. **Research organizations, anchor institutions, universities, or other local government** staff might be good places to look for a Data Lead.

Community Engagement Lead

The Community Engagement Lead will plan and possibly facilitate the community engagement activities. This person should have extensive knowledge of engagement methods, be familiar with principles of inclusive and equitable engagement, and have connections to community-based organizations in the city or county. **Nonprofits or community-based organizations** might be good places to look for a Community Engagement Lead.

Communications and Outreach Lead

The Communications and Outreach Lead will coordinate both internal and external communication regarding the Mobility Coalition's work. This person should be familiar with communications channels across the region, including social media and platforms used by harder-to-reach populations like English language learners, people without access to internet, and the elderly. **Philanthropies or anchor institutions** might be good places to look for a Communications and Outreach Lead.



Upward Mobility Cohort participant **Summit County** hired a marketing consulting firm specializing in culture change and diversity, equity, and inclusion to help with community engagement facilitation and writing the MAP.

Upward Mobility Cohort participant **Philadelphia** engaged a nonprofit partner that provides workforce development programming to help plan and execute their community engagement with formerly justice-involved individuals who had experienced housing instability.

Upward Mobility Cohort participant **St. Lucie County** hired a communications and political polling firm to help with stakeholder surveys, engagement, and the facilitation of meetings and focus groups.

Upward Mobility Cohort participant **Boone County** hired a data and performance management consultant to advise them on results-based accountability and help them conduct a Data Walk.

Learning and Evaluation Lead

The Learning and Evaluation Lead will oversee the codevelopment of success measures (along with the Data Lead and other relevant stakeholders and community members) and create an evaluation plan for the Mobility Action Plan strategic actions. They will also facilitate continuous learning and improvement activities so that the Mobility Coalition can modify strategies over time. This person should have experience with multiple forms of evaluation, organizational improvement, and information-gathering methods, including developmental evaluation, randomized controlled trials, performance management, results-based accountability, qualitative research and interviewing, and systems change. **Research organizations** or **philanthropies** might be good places to look for a Learning and Evaluation Lead. The Data Lead may also be the right person to lead the Learning and Evaluation process (described later in this step). If you decide to keep these functions separate, the Data Lead and Learning and Evaluation Lead should work closely together to develop the monitoring and evaluation mechanisms for this work.

Each member of the management team may also decide to organize their own small operations team to provide additional capacity. For example, the Data Lead might gather a group of data analysts from across the government and its partners to assist with data gathering, cleaning, and analysis. The Community Engagement Lead might assemble a small management team composed of individuals from local nonprofits or community-based organizations who have experience working closely with community members. Before leads ask others to contribute time to management team roles, they should have a clear sense of what support they need, how much time and energy they're asking of people, and how they'll work to minimize the burden on these individuals given that doing this work is not their primary job. They should communicate expectations clearly in the request.

Engaging external support can bring critical knowledge and assets to the effort and fill management gaps when the county or city is constrained. If you decide to go this route, you'll need to make sure external

partners have the relationships and authority to operate effectively in their roles. To enable their success, you should help set up their introductory meetings, make sure they understand how government decisions are made, figure out logistics such as document sharing and the cadence of check-ins, and support and elevate their requests when necessary to make sure tasks are completed on time.

Step 4.2 Identify Key Stakeholder Partners

Your Key Stakeholder Partners are the members of the Mobility Coalition charged with executing most of the tasks during the mobility action planning process. They may be organized into smaller working groups to lead the research, development, and writing of specific pieces of the MAP. Remember, it is important to think of the government as the host and convener of the Mobility Coalition rather than its lead. For the purposes of this work, the local government is the “backbone organization”—a term coined by nonprofit advisory firm FSG that refers to the “supportive infrastructure for a collective impact initiative.”⁷

In the paragraphs below, we present how to identify and engage Key Stakeholder Partners.



Keep in mind that this group will likely grow or change once you’ve done a deeper dive into your data (discussed in the next step) and know what your key priorities and activities will be. Revisit this list at the end of Step 6 and add members to the Coalition as needed.

In forming a new Mobility Coalition, it’s helpful to begin by learning who is currently working on the issues you’re hoping to address and whether they might be appropriate partners. No one wants to be part of yet another project that duplicates efforts already under way. Rather than reinventing the wheel, talk to your partners about how you might align your efforts and fill important gaps. There may be a collective impact initiative in your community, such as in the Riverside County example below, that is already working on some of the policy issues you hope to tackle. In that event, engage relevant groups early to see how you might collaborate to advance your mutual goals, and be prepared to make the case for how working with you will benefit their cause.



Lift to Rise is a collective impact organization based in **Riverside County, California**. The organization was founded in 2014 when a group of community-based organizations serving Riverside County’s Coachella Valley came together to discuss using a collective impact approach to address issues like housing instability and economic insecurity. The initial work focused on housing instability and transformed the County’s ability to successfully partner with cross-sector organizations. Together with Lift to Rise, they built a powerful collective-action network of more than 50 regional stakeholders who collectively developed a cross-sector housing agenda that is still in operation.

Three years after this work started, Riverside County and Lift to Rise adapted the successful collective-action model for their participation in the Urban Institute’s Upward Mobility Cohort,

using lessons learned from extensive community listening and qualitative research and working with resident leaders to shape their priorities around economic opportunity and mobility. They relied on existing partnerships with local stakeholders to reach residents with lived experience and utilized Lift to Rise’s analytic capacity to understand relevant data. Importantly, the County shared resources from the Mobility Cohort grant directly with Lift to Rise to support dedicated staff for resident engagement, data analytics, and project management. By building on an existing collaboration, Riverside County and Lift to Rise were able to move quickly to identify priorities, locate additional datasets, and facilitate community engagement and collective action planning. Lift to Rise was able to bring in other important partners, including the Desert Healthcare District and the InlandSoCalHousing Collective.

You can create a stakeholder inventory by brainstorming a list of the various local actors working on mobility from poverty. Feel free to use the **Stakeholder Inventory Worksheet** at the end of this step to assist with your brainstorming.

Larger cities and counties—and some smaller communities—may have an abundance of existing and potential partners they can include in their inventory. Given our approach for Boosting Upward Mobility and Advancing Equity, you might begin by identifying potential partners whose work is focused on promoting **power and autonomy** and **being valued in community**, who have a strong **racial equity** approach, who are well regarded among community members for delivering high-quality programs, and/or who have experience with **data-informed decisionmaking** and working with multiple partners. A single partner doesn’t need all of these capacities, but the Mobility Coalition should be made up of individuals that cover these areas.

On the other hand, engaging a broad range of stakeholders may not be achievable right away, especially if the local government does not have a culture of external partnership or the leadership to advocate for it (see Step 3). You may also work in a city or county with a particularly large bureaucracy and a lot of its own capacity to conduct this work. In this case, you might initially engage external partners on an ad-hoc basis. External partners can still be helpful if they are brought in at critical junctures and given meaningful opportunities to share ideas, advice, and feedback. This approach can also help the city or county build the relationships and trust necessary to create a more robust coalition.

As you brainstorm, consider adding stakeholders to your inventory from the following types of organizations:

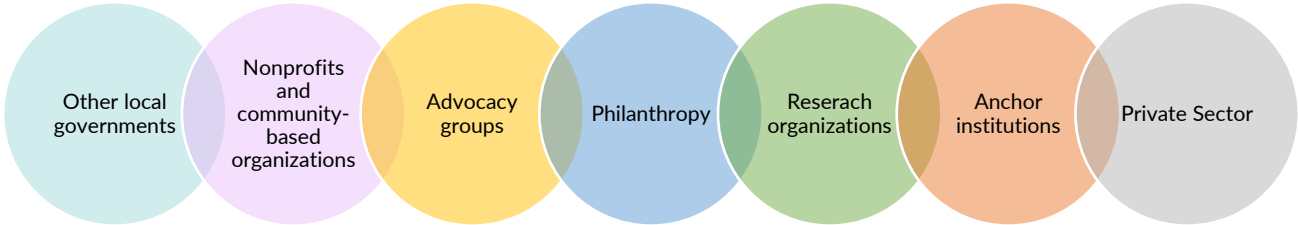


Figure 8: Sectors from which to invite partners for the Mobility Coalition

...from the following domains:

UPWARD MOBILITY PREDICTORS

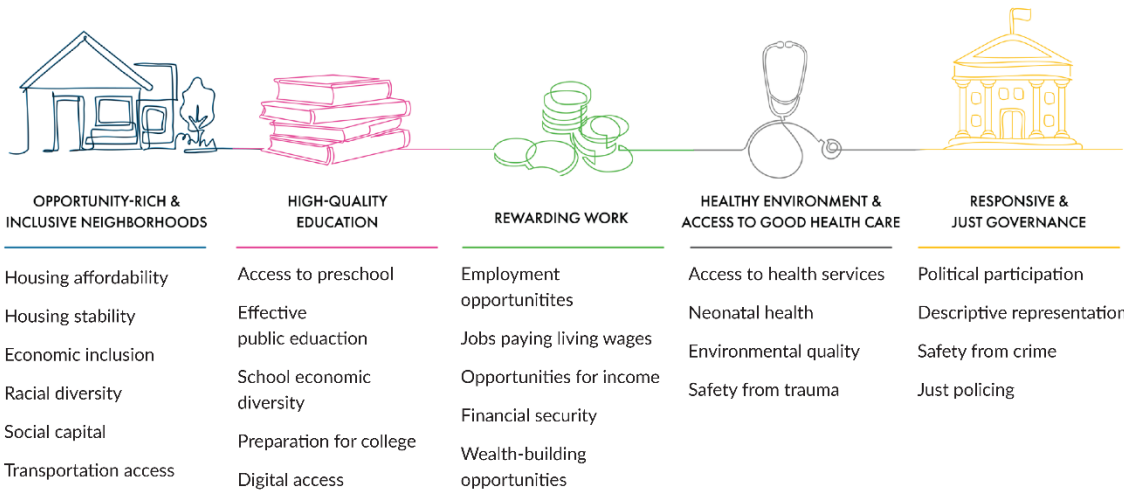


Figure 9: Upward Mobility Predictors

...and who serve or represent the following key population groups:

- People of color
- People with disabilities
- English-language learners
- Workers making low wages
- People experiencing housing instability or homelessness
- Disengaged youth
- People who involved with the justice system
- LGBTQ+ people
- People age 65 and older

If your list of partners looks long, that's okay! This is just the inventory step. From here, you'll narrow the list by looking for "critical partners," without whom you would not be able to execute the Mobility Action Planning process; successfully identify policy, practice, and programmatic gaps; or implement the ideas that you eventually develop.

To identify critical partners, ask these questions about the potential individuals and organizations listed in your inventory:

- **Aligned initiatives:** What activities or initiatives does the organization undertake that might align with our efforts to boost mobility from poverty and bring about **racial equity**? Do they currently have an internal- or external-facing racial equity initiative or conduct **deep and meaningful community engagement**? Does their work focus on promoting **power and autonomy** and **being valued in community** among participants? Are they focused on **systems change**?
- **Assets:** What assets might this stakeholder bring to the partnership? Assets might include things like research and analytic capability, staff, financial resources, political clout, key relationships, strong connections to community members, fundraising capacity, experience creating a narrative change campaign, convening power, **data-informed decisionmaking**, or a strong racial equity approach.
- **Partnership:** How would the potential partner benefit from working with the local government?
- **Motivations:** What motivates this organization? Who or what are they accountable to and what drives them to action?
- **Roles:** Are there individuals working for this organization who have critical frontline or technical knowledge that will be key to transforming systems and responding to community members' needs?

Once you've had a chance to respond to these questions regarding potential partners, some will likely stand out as being most critical to invite to your Mobility Coalition. Because you will need to revisit the initial list of partners throughout the Mobility Action Planning process, it's fine to start out with a slightly smaller group and add others over time. Eventually, you might break the key stakeholder partners into working groups centered around specific community priorities or activities.

Another thing to keep in mind is that some of the organizations on the list might be good candidates for a "keep informed" category. Organizations in this category need not be formally engaged as part of the Mobility Coalition but should be kept in the loop about work being completed as they may still be responsible for implementing elements of the MAP.



Community members as Mobility Coalition members: Once you have selected specific organizations to join the Mobility Coalition, we encourage you to work with them to bring in community member partners as well. For the purposes of this project, "community members" are people who are currently experiencing poverty, were previously in poverty, and/or are people of color who have experienced discrimination and barriers to success as a result of structural racism, discrimination, and prejudice. Community members can contribute unique perspectives that those who have traditionally held wealth or power cannot. Although these individuals may work for organizations that could already be considered key stakeholders on the project, ideally you will invite community members to participate as individuals who have engaged with local services and systems designed to alleviate poverty.

To identify individual community members who could serve on the Mobility Coalition, you might begin by asking for recommendations from nonprofit or community-based organization partners.



When engaging community members in a leadership role, it is important to pay participants for their time and expertise (because they may not be participating in their professional capacity like the other Coalition members are) and provide them with the materials, information, and/or training to understand the various systems and predictors you'll be working on. Extra attention should be paid to how power dynamics in the Mobility Coalition might discourage community members from speaking up or block opportunities for them to lead pieces of the work. The onus to mitigate this challenge is on the management team, not the community members.

Note that inviting community members to join the Mobility Coalition is *supplemental to* doing community engagement on this project. You will still need to engage a wider group of community members to inform your MAP. This process will be covered in more detail in Step 6.

Step 4.3 Identify Champions

Champions make up the final category of Mobility Coalition participants. Champions need not attend every planning meeting, but they should be influential individuals who can support critical aspects of the work, such as determining direction and scope, persuading individuals who are difficult to bring in to the work, seeking buy-in from elected officials, reviewing the MAP, and launching the MAP publicly. Below are some qualities of a good champion:

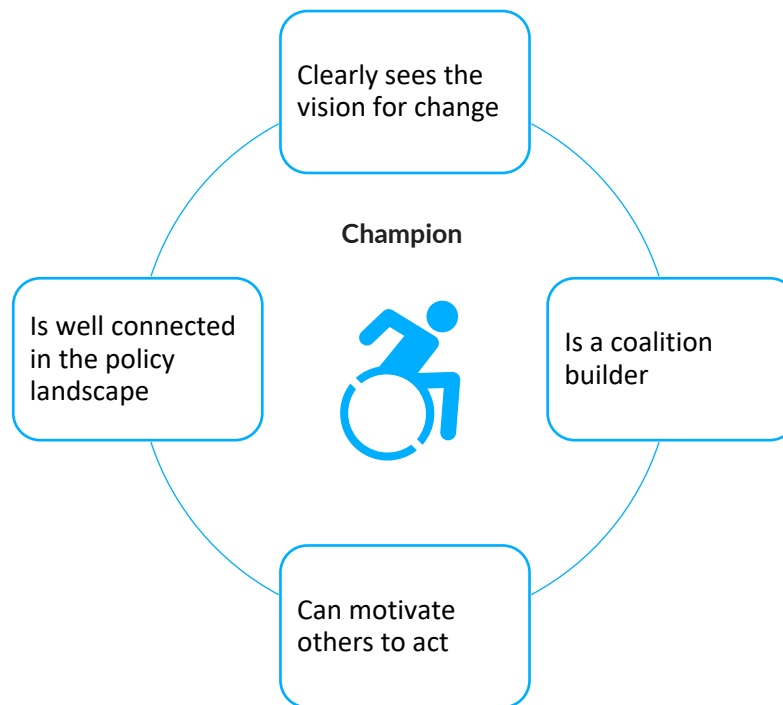


Figure 10: Qualities of a good champion

Champions have several responsibilities:

- Coordinating and convening additional stakeholders who may not have worked together before
- Liaising with policymakers and elected officials to gain their buy-in for the work
- Advocating publicly for the work, especially with individuals who need to be persuaded of its importance or persuaded to participate
- Fundraising for the strategic actions in the MAP
- When needed, helping to enact policy change
- Sharing progress updates and reporting on early wins

Like the key stakeholder partners, champions may be found both within and outside of government. There may be champions within partner organizations whose job is to help promote the work of the Mobility Coalition or advocate for specific policies or programs publicly. For example, many community foundations have served as the champions for local inclusive economic development and education initiatives. However, because this work will be launched by the local government, it is critical for there to be at least one strong champion—and ideally several—within government.

Step 4.4 Make the Request

Joining the Mobility Coalition requires a substantial commitment of time, trust, and social capital. Thoughtfully framing the ask to each potential partner or champion is key to starting the Mobility Coalition off on the right foot. Whoever has the most direct relationship with the identified partner or champion should make a direct, personalized request that includes a rationale for the invitation, shares what resources or support they will be given in exchange for partner's or champion's time and expertise, introduces them to the Project Manager, and proposes how the city or county is planning to share power during the work.

Invitations should also include a note about what makes this effort different from others the government has undertaken. For example, many successful cross-sector initiatives began because local leaders became aware of some startling statistic about their community and decided to take action to address it. As you prepare to launch your Mobility Coalition, consider sharing the some of your [Mobility Metrics](#) from Step 2 to illustrate why change is needed.



The **Charlotte-Mecklenburg** Opportunity Task Force was launched in response to the Equality of Opportunity study published by Harvard University and the University of California, Berkeley. The study ranked the Charlotte area as the worst region for upward mobility for children born into the lowest income quintile out of 50 of the largest metropolitan areas in the US (Chetty, Hendren, Kline, and Saez 2014). Upset by the clear evidence of segregation and intergenerational poverty, the county commission chair and a group of nonprofit leaders decided to launch a task force to investigate the problem and recommend a plan of action for the County (Opportunity Insights 2020).

The Urban Institute's 2018 research on economic mobility in California's largest cities revealed that **Fresno** ranked last out of 59 cities for economic and racial disparity.⁸ In response to this poor ranking and to the call by California Governor Gavin Newsom to develop a comprehensive economic plan for the whole state, a group of civic, community, and business leaders came together to launch the DRIVE Initiative, a 10-year investment plan to develop an inclusive, vibrant, and sustainable economy for residents of the greater Fresno region.⁹

At the end of this Step, we provide a **Sample Outreach Letter** in the supplemental materials.

Step 4.5 Launch the Mobility Coalition

In the first few months that the Mobility Coalition is active, it will be important to make time for a few kickoff activities (listed below in a recommended sequential order). We have included some sample agendas at the end of this step that can help you set up your first few meetings. We also provide links to external resources that can help you develop an agenda or session plan.

Get Acquainted

People working closely together will need time to get to know one another and understand how each partner fits into the overall puzzle. You may want to create opportunities for partners to present about their organization's work and why they care about boosting mobility from poverty and advancing equity, especially because some partners will be new to working with the county or city or will not have had opportunities to join similar coalitions in the past. Making space for team building and introductions will help ensure new voices don't get sidelined and are treated equitably in decisionmaking.

Discuss Expectations and Roles

It is important to make space at the outset for partners to discuss their expectations and hopes for the Mobility Coalition. In particular, the coalition should plan to discuss expectations about the frequency of meetings, which communication platforms they will use, what role each member will play in the coalition, and how decisions will be made. Although it may be typical for the local government to set expectations in isolation, we encourage a more collaborative approach to developing shared norms and expectations. Although you won't write the full MAP until you've completed all phases of the planning process, it will be important to identify whose role it is to eventually assemble the pieces and write any additional text needed to put together the final MAP. Start to think about who this should be so they can prepare themselves for the role.

Determine How Decisions Will Be Made

The coalition will need to define how decisions will be made, who gets to provide input, and who makes final calls. Coalitions could adopt a consensus model, use majority rule, or leave the government lead to decide after considering input from others (see Step 7 for more information about decisionmaking models).

Begin Developing Common Values and Narratives

As has been pointed out in much of the literature on systems change, tackling a complex problem without a shared understanding of its cause can lead to fragmented and/or inadequate solutions. Removing the barriers that systems have created and sustained requires partners to develop common values and agree on a cohesive narrative about what has caused the community's challenges. It's likely that people in your Coalition will have different understandings about how **racial inequities** came to be and that they will have varying levels of comfort talking about privilege or experiences with racism. Shared Analysis is a discussion approach through which participants learn about the history of racism in their community, establish a common framework and language for discussing race and equity matters, develop strategies for discussing tough subjects in a respectful and honest way, and learn how to redefine leadership structures and roles so as to create **racial equity**-focused strategies.¹⁰

Strive for Mutually Supportive and Sustainable Partnerships

The following principles, gathered from the literature on collective action, racial equity, and stakeholder engagement, will be key to building and working with your team for systems change:

- **Ask not (only) what your partner can do for you.** Typically, we partner with organizations that offer something we need—we may want to leverage their networks or utilize some of their funding and resources to amplify our own goals. However, creating strong and resilient partnerships and sustaining work over several years requires partners to mutually reinforce one another's work. Developing strong, mutually supportive relationships with your partners will promote coordination and equity in your policy development. In practice, this means assessing your own resources, networks, and capacities to see what you can share with others and showing up to events hosted by your partners in support.
- **Commit to **racial equity** as both a process and a goal.** Setting a goal to create more racially equitable outcomes in your community while not addressing how individuals in your Mobility Coalition think about, embody, and practice equity will likely lead to insufficient solutions. What's more, it's likely that each person in your coalition will have very different opinions about and experiences of racial equity. To create an effective and cohesive coalition, you must seek to build a common understanding of what equity means to the group and how each person's identity might contribute to their understanding of equity, build trust among coalition members and with community leaders and members, invite individuals to the coalition who can share lived experience and content expertise, and commit to disaggregating data and conducting **deep and meaningful community engagement**.
- **Focus on continuous learning and improvement as a path to systems change.** The systems that block racial equity and mobility are complex and dynamic. Actively learning whether organizational structures, relationships, or industry norms are hindering you or helping you achieve your goals and then adapting approaches as needed is critical to doing this work well. This requires taking time to reflect on how partnerships are working and what could improve coordination.

- **Share power authentically.** Although the local government may be the coordinating body of this work, you should include external partners at every stage, giving them real ownership and opportunities to inform and shape decisions.
- **Be patient.** Forging sustainable partnerships cannot be done quickly. It's important to take the time to learn about your partners and their values, goals, and approaches to the work. Even after launching your Mobility Coalition, be patient with one another—creating the conditions to boost mobility from poverty and advance equity will likely take years. Carefully forging your partnerships early on and devoting work to maintaining them will lead to more meaningful collaboration over time.

STEP FOUR REVIEW CHECKLIST

- The Management Team has been assembled.

- Key stakeholder partners, **community members**, and champions have been invited to join the Mobility Coalition.

- The Mobility Coalition has officially launched with an initial meeting.

- All roles and decisionmaking processes have been determined.

- There is a plan in place to develop shared values and narratives on the Mobility Coalition.



STEP FOUR

Supplemental Materials

1. Sample Partner Outreach Letter
2. Launching the Mobility Coalition Sample Agendas
3. Stakeholder Inventory Worksheet

Sample Partner Outreach Letter

Dear Tamika,

The City has decided to launch a new cross-sector, cross-domain partnership focused on boosting mobility from poverty and advancing equity for residents with low incomes and residents of color. Though efforts to boost mobility have been going on for decades in the city, recent data from the Urban Institute show that over 50 percent of our residents have debt in collections and that our median incomes are the lowest among cities of a similar size. What's more, only 40 percent of 3- and 4-year-olds are enrolled in nursery school or preschool. This problem is particularly acute for children of color.

Rationale for the ask

These data are proof that what we've been trying isn't working. It's time for a reset on our work so that we can better align initiatives among the various organizations working in the city, focus on changing systems and ending structural racism, and become more coordinated in our application for the resources we need to do this work. We recognize that the City has a lot more work to do on this front, which is why we wanted to invite you to join our new Mobility Coalition, which aims to boost mobility from poverty and advance equity over the next five years. We are specifically interested in having Homes for Vets as part of our team because of your exemplary work—we've seen how you have used data-informed decisionmaking in locating homeless services and have heard that you have some of the best supportive services out there. We at the City and others in the group have a lot to learn from you.

What resources or support you're giving them

We know you already have a lot of work on your plate and we value what you might bring to this partnership. We are proposing to give your organization \$25,000 per year for your participation. We have also been thinking about how to make sure that this effort is a true partnership. Although the City will serve as the backbone organization to coordinate and manage the work, we will be asking various partners to lead subgroups, present their work, and provide the needed practical expertise to ensure the identified solutions fit the communities that need them.

How the city is planning to share power with partners

On that note—if you decide to accept my offer, I was wondering if I might invite you to lead a session at our kickoff meeting. Thank you for the work you do in our community and for considering my request,

City Council Member Jones

Launching the Mobility Coalition Sample Agendas

Use the sample agenda and some of the suggested prompts below to develop your own agendas for your initial Mobility Coalition meetings.

Introductions and Team Building

- Welcome remarks
 - Project Manager
 - City or county champion
- Introductions
 - Introduce yourself: Name, pronouns, and affiliations
 - Ice breaker questions:
 - What motivated you to join this work as a coalition member?
 - What do you hope to learn from your peers through this work?
 - What do you hope we accomplish as a coalition?
 - What are you most proud of in the work that you're currently doing?
- Work Overview
 - Present the Framework for Boosting Mobility and Advancing Equity and your community's Mobility Metrics
 - Preview that several early meetings will be spent learning about and discussing the Framework
- Q&A
- Next steps

Discussing Expectations

- Welcome and Goals
- Introduce Management Team leads
- Discuss workstyles
 - How do you prefer to receive and communicate information?
 - How do you engage best with others?
 - What opportunities or constraints does your department or organization create for our work?
 - How does the approval process work for your department or organization?
- Agree on norms that will guide the relationships between people on the Mobility Coalition

- Collaboratively set expectations for the Coalition
 - How frequently should our Coalition meet so as to advance the work and not overburden members who have other responsibilities?
 - Which forms of communication does your team or office use?
 - Which forms of communication do you like using most? Why?
 - What does a respectful relationship between Coalition members look like to you?
 - What does a disrespectful relationship between Coalition members look like to you?
 - How should we decide what and when we share our work publicly?
 - How much time can we reasonably expect you to spend on this work each month?

Deciding How Decisions Will Be Made

- Welcome
- Ice breaker
 - What is a value you hold that you want to see come through the coalition decisionmaking process?
- Discuss how various partners typically make decisions
 - Who gets to provide input? Who has the final call?
- Present different decisionmaking methods
 - Consensus model
 - Majority rule
 - Unanimous support
 - Simple majority or plurality
 - Internal government authority
- Debate and agree on the decisionmaking model that the Mobility Coalition will adopt
- Determine Accountability Measures
 - Who is accountable when decisions are not properly met or implemented?
 - How will responsibilities be delegated and distributed across the Coalition?

Stakeholder Inventory Worksheet

Instructions: Use this worksheet to brainstorm a list of potential partner organizations to join your Mobility Coalition. As you start, we encourage you to consider potential partners broadly to include those already doing this type of work, partners that the local government has never worked with before, and those who may oppose your cause but whose participation will be critical to success. Below we highlight some questions you can ask yourself to identify partners to bring into your coalition and what value they would add. They should be answered based on your preliminary review of the Mobility Metrics data and returned to once you've conducted a more comprehensive analysis of the available data in your community.

Part 1: Identify Target Groups and Who Can Support Action

- Which of the following groups of people are falling behind according to the Mobility Metrics?
 - People of color
 - A specific racial or ethnic group_____
 - People with disabilities
 - English-language learners
 - Workers making low wages
 - People experiencing housing instability or homelessness
 - Disengaged youth
 - People involved in the justice system
 - Residents with low incomes
 - Middle-class residents
 - Other_____
- Which of the following predictors is of greatest concern to you?

<ul style="list-style-type: none"> <input type="checkbox"/> Housing affordability <input type="checkbox"/> Housing stability <input type="checkbox"/> Economic inclusion <input type="checkbox"/> Racial diversity <input type="checkbox"/> Social capital <input type="checkbox"/> Access to preschool <input type="checkbox"/> Effective public education <input type="checkbox"/> School economic diversity 	<ul style="list-style-type: none"> <input type="checkbox"/> Preparation for college <input type="checkbox"/> Digital access <input type="checkbox"/> Employment opportunities <input type="checkbox"/> Jobs paying living wages <input type="checkbox"/> Opportunities for income <input type="checkbox"/> Financial security <input type="checkbox"/> Wealth-building opportunities 	<ul style="list-style-type: none"> <input type="checkbox"/> Access to health services <input type="checkbox"/> Neonatal health <input type="checkbox"/> Environmental quality <input type="checkbox"/> Safety from trauma <input type="checkbox"/> Political participation <input type="checkbox"/> Descriptive representation <input type="checkbox"/> Safety from crime <input type="checkbox"/> Just policing
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- What assets does your Mobility Coalition need?

<ul style="list-style-type: none"> <input type="checkbox"/> Research and analytic capacity <input type="checkbox"/> Staff <input type="checkbox"/> Financial resources <input type="checkbox"/> Political clout <input type="checkbox"/> Strong connections to community members <input type="checkbox"/> Experience conducting deep and meaningful community engagement 	<ul style="list-style-type: none"> <input type="checkbox"/> Fundraising capacity <input type="checkbox"/> Convening power <input type="checkbox"/> Data-informed decisionmaking experience <input type="checkbox"/> A strong racial equity approach <input type="checkbox"/> Data sharing <input type="checkbox"/> Other_____
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Part 2: What Existing Partnerships Do You Have?

Use this section to list the names of the stakeholders with whom you currently have a good partnership and who serve one of your target populations, does work in one of the priority predictors, or has assets that would benefit the work of the Coalition.

Organization name	Type of organization	Target populations served	Domains of work	Assets
e.g., Forest City Asset Builders	Nonprofit	Disengaged youth, residents with low-incomes, people of color	Financial security, housing stability	Strong data-sharing capabilities; experience conducting deep and meaningful community engagement
e.g., Forest City Community College	Anchor Institution	Residents with low-incomes, English Language Learners, workers with low-wages	Employment opportunities, opportunities for income	Convening power, research and analytic capacity, political clout

Part 3: Where Are There Opportunities to Build New Partnerships?

Use this matrix to identify partners who can help advance this work and who serve one of your target populations, does work in one of the priority predictors, or has assets that would benefit the work of the Coalition.

	Organization name	Target populations served	Domain of work	Assets
Nonprofit and CBOs				
Anchor institution				
Faith-based community				
Other local government				
Philanthropy				
Research organization				
Private sector				
Advocacy organization				

Part 4: How could these partners' participation benefit the work of the Coalition?

Start listing your existing or potential partnerships in the matrix below and identify how their participation could benefit the work of the Coalition. Using the questions in Step 4.2 of this guide, complete this exercise for as many partners as you'd like.

Identified partner	Aligned initiatives	Motivations for joining	Roles	Barriers to partnership/how they're a good partner
<i>Ex. Forest City Asset Builders</i>	Wealth-Building for All campaign	They want to expand their wealth-building programming to a wider audience in the city	Forest City AB Director as champion; Forest City AB Data	They have a long history of work in this space that we can learn a lot from. However,

Identified partner	Aligned initiatives	Motivations for joining	Roles	Barriers to partnership/how they're a good partner
			Analyst as Data Team Lead	they may be skeptical of people for whom this work is a newfound interest.
<i>Ex. Forest City Chamber of Commerce</i>	Forest City Small Business Loan program	They want to increase their contacts with key stakeholders in the city.	Forest City Chamber Director as Communications Lead	They have the ear of the business sector in our city and can help us bring these critical actors into our strategy. However, they may be reticent to support some of the more progressive policies advocated for by this group.

Part 5: Develop Your Invite List

Based on the outcomes from these exercises, a few organizations or people will likely stand out as being critical to invite to join your Mobility Coalition. (Remember that you may also find individuals or organizations on this list who instead belong in a “keep informed” category.) Reviewing your notes from above, create a final list of invitees to join the Mobility Coalition. You should also use your notes about what assets they can bring and what makes them a good partner in your outreach letters.

Potential coalition member	Organization	Who will send invitation?

As mentioned, because you will need to revisit the initial list of partners throughout the MAP development process, it's fine to start out with a slightly smaller group and add others over time.