

BOOSTING UPWARD MOBILITY

# A PLANNING GUIDE FOR LOCAL ACTION

# Table of Contents

01

## Introduction

- 02 Who Is this Guide For?
- 02 How Can You Use This Guide?
- 04 How Did We Develop this Guide?

05

## Our Approach to Upward Mobility

- 06 Familiarize Yourself with Our Framework for Boosting Mobility and Advancing Equity
- 10 Get Acquainted with Our Planning Principles
- 11 Consider the Various Actors Needed for Collaboration
- 14 Understand the Key Components of a Mobility Action Plan

17

## Use Mobility Metrics to Surface Insights

- 17 Learn How We Developed Our Mobility Metrics
- 21 Access the Mobility Metrics for Your Municipality
- 21 Make Note of Preliminary Insights
- 23 Compare Your Data with Data from Other Jurisdictions
- 25 Supplemental Materials

29

## Ensure Your Local Government Is Ready to Undertake This Work

- 30 Gain Commitment from Local Government Leadership
- 30 Prepare to Engage Cross-Sector Partners across Policy Domains
- 31 Ensure Sufficient Organizational Capacity
- 32 Determine Whether Your Organizational Culture Can Support Large-Scale Change

32 Help Leadership Gain Staff Buy-In across Departments

33 Confirm a Shared Desire among Government Staff to Build a Shared Understanding of Structural Racism and Racial Equity

34 Identify the Skills and Capacities Necessary for Data Gathering and Analysis

34 Dedicate Resources for Deep and Meaningful Community Engagement

35 Commit to Ongoing Learning and Improvement

35 Assess Your Readiness to Act

37 Supplemental Materials

45

## Build Your Coalition for Systems Change

47 Assemble the Management Team

50 Identify Key Stakeholder Partners

54 Identify Champions

55 Make the Request

56 Launch the Mobility Coalition

60 Supplemental Materials

69

## Develop an Initial Understanding of Local Mobility Conditions

69 Review Your Local Mobility Metrics as a Coalition

70 Identify and Collect Supplemental Data Sources

74 Analyze Your Supplemental Quantitative Data

78 Supplemental Materials

81

## Build a Fuller Picture of Mobility Conditions in Your Community

- 82 Break the Mobility Coalition into Smaller Working Groups
- 83 Collect Qualitative Information through Stakeholder Engagement
- 83 Collect Qualitative Information through Community Engagement
- 88 Gather Other Qualitative Data to Understand the Systems and Prevailing Narratives in Your Community
- 92 Draft an Initial Summary of Upward Mobility Findings
- 92 Follow Up with Community Members to Share the Upward Mobility Findings
- 93 Write the Relevant Components of Your Mobility Action Plan
- 94 Make a Plan for Sustaining Engagement with the Community
- 99 Supplemental Materials

114

## Determine Your Strategic Actions

- 115 Review and Discuss the Final Upward Mobility Findings as a Coalition
- 116 Develop A Community Vision Statement
- 116 Create Your Theory of Change
- 117 Develop a Systems Change Logic Model
- 129 Seek Review and Approval of Your MAP Logic Model
- 130 Write the Relevant Components of Your Mobility Action Plan
- 132 Supplemental Materials

155

## Develop Your Measurement Plan and Consider Sustainability

- 155 Develop Your Measurement Plan
- 160 Reengage the Community
- 161 Establish Processes for Reporting and Accountability
- 162 Consider Sustainability
- 164 Make a Plan for Continuous Learning and Evaluation
- 164 Write the Relevant Components of Your MAP
- 166 Supplemental Materials

170

## Finalize and Release Your Mobility Action Plan

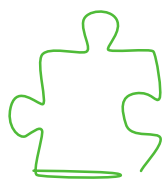
- 170 Determine the Format of Your Final MAP
- 171 Make a Plan for Releasing your MAP Publicly
- 172 Ensure Your Messaging Is Engaging and Appropriate
- 173 Release Your MAP!

175

## Sustain Momentum

- 176 Report on Early Wins
- 176 Build on Your Foundation
- 176 Protect the Work from Political Cycles
- 177 Support Continuous Community Engagement
- 177 Demonstrate the Need for Sustained Funding

## STEP SIX



# Build a Fuller Picture of Mobility Conditions in Your Community

In the previous step, your Mobility Coalition reviewed the [Mobility Metrics](#) as a group and started to collect supplemental quantitative data to build an initial understanding of local mobility issues. Step 6 focuses on deepening that understanding to build a fuller picture of mobility conditions in your community. Think of this process like putting together a puzzle; each data source represents a different puzzle piece, and you get closer to seeing the entire puzzle by assembling as many pieces as you can.

Now that you have your Mobility Metrics puzzle piece and some of your supplemental quantitative data puzzle pieces, you need to assemble information from other sources, such as historical records about policies and programs that may have created structural barriers to equity and mobility from poverty; program evaluations; qualitative information gleaned from surveys, focus groups, and other community and stakeholder engagement activities; ecosystem maps that show networks and relationships between organizations in the mobility from poverty ecosystem; and narratives that underpin systems of power and oppression. Assembling insights from these different data sources will help you

- gather deeper insights about outcomes you see in the Mobility Metrics data,
- understand how community members would prioritize local needs,
- build trust with communities who have lost trust in government,
- learn about what harmful narratives are being used to rationalize certain policies or inaction,
- understand what systems are creating and sustaining inequities,
- learn about your community's assets and strengths, and
- make the case for selecting strategic actions.

Each substep below presents activities for effectively gathering the information you'll need to meet the above goals. You may not need to do all these anew for this work as some of this information may exist already from other initiatives. You should consult the Mobility Coalition members to learn about what insights are already available and which you feel will be the most helpful to gain to learn more about conditions in your community.

## Step 6.1 Break the Mobility Coalition into Smaller Working Groups

Breaking the Mobility Coalition members into smaller “working groups” can provide more focus and accountability around collecting supplementary sources of information and having in-depth discussions analyzing the data. These groups can meet for as long as you deem necessary (within the constraints of your goals and timeline), and with whatever frequency makes sense for the partners involved. Note that working groups can be reorganized as needed.

The goal of each working group should be to

1. interrogate, discuss, and come to a shared understanding of what is shown in the data and information collected; and
2. discuss what programs, practices, and policies each stakeholder has insight into or purview over that have created or sustain these conditions.



When convening working groups, make sure to prioritize cross-sector partnerships. Be intentional when naming working groups or inviting engagement. For example, instead of calling a group the “Housing Group,” which may only resonate with subject-matter experts, consider expanding the scope to the predictor level (for example, “Opportunity-Rich and Inclusive Neighborhoods”) which could sound more inclusive to developers, researchers, and nonprofit organizations alike and includes not just housing but also economic inclusion, transportation access, and social capital. If your language is more inclusive of system-wide factors, you are more likely to encourage engagement across multiple policy domains. Working with a diverse range of colleagues or stakeholders can help challenge assumptions, check biases, and illuminate opportunities for systems change that may not have surfaced otherwise.

At some point between goals 1 and 2 above, the Project Manager should facilitate peer sharing sessions between representatives from each Working Group. Each representative can outline what their group has discussed and spend time identifying similar patterns, overlapping themes, and issues that may have cross-predictor solutions or underlying causes. These meetings can end with a directive for each representative to report back to their Working Group any insights they gleaned about what other factors may be influencing their specific outcomes. These insights will help direct each group’s thinking and open their thinking to interventions that may be outside their expertise or range of oversight. These meetings and interactions should result in an initial Summary of Upward Mobility Findings from each Working Group or subject area, which can be aggregated into one concise narrative once they have been finalized.

## Step 6.2 Collect Qualitative Information through Stakeholder Engagement

In your efforts to identify the underlying causes of observed outcomes, we suggest engaging additional stakeholders outside of the Mobility Coalition who may have specific knowledge and perspectives to share (e.g., service providers, frontline staff, advocacy groups, business leaders). Soliciting those perspectives can help you understand the historical factors that have led to current conditions in your community and gain deeper insight into what they see in their day-to-day work and what's working and what's not. Engagement can be conducted using various methods like interviews, focus groups, and surveys.



Upward Mobility Cohort participant **Washington, DC**, partnered with three community-based organizations to lead stakeholder engagement with residents in their three priority domains of housing, workforce and adult education, and financial well-being. These engagement activities included focus groups, surveys, and interviews with affected residents. The District also worked directly with more than a dozen CBOs through interviews, focus groups, and a roundtable discussion. The community-based organizations included organizations that focus on community development, workforce training, affordable housing construction and operations, youth and adult education, and human services.

As you engage stakeholders in your community, don't forget to share information about the upward mobility work you're doing, offer opportunities for them to participate in the Coalition, and be respectful of their time and expertise. See a sample **Stakeholder Focus Group Discussion Guide** at the end of this step.

## Step 6.3 Collect Qualitative Information through Community Engagement

Building a fuller picture of mobility issues in your community requires extensive and thoughtful community engagement. This substep suggests methods for working with community members to gather qualitative data that can shed more light on the **Mobility Metrics** outcomes. The Community Engagement Lead on the Mobility Coalition should oversee this piece of the work. To aid with this activity, we include a **Community Engagement Plan Template** at the end of this step.

Before getting to the specific methods for engaging community members in this work, we share below some engagement best practices, inspired by the work of the [Kirwan Institute](#), [PolicyLink](#), [Chicago Beyond](#), [our colleagues at the Urban Institute](#), [the Fresno DRIVE Race Equity Plan](#), Helen "Skip" Skipper of the NYC Justice Peer Initiative, and [one of the authors of this guide](#):

- **Clarify who "the community" is for this work.** In short, it's everyone who lives or works in a certain geographic area. However, given the history of structural racism, discrimination, and disinvestment in the US, the community members you should especially seek to engage for the MAP are people of color, individuals with low incomes, people with disabilities, immigrants,

English-language learners, people experiencing housing instability or homelessness, disengaged youth, people involved in the justice system, and anyone else with lived experience of poverty or discrimination. When preparing to do community engagement, make sure you know who your primary communities of interest are and whether there are subgroups within those communities that are disproportionately affected by poverty and structural racism (for example, within the Asian American and Pacific Islander community, the Cambodian American population may experience worse outcomes than the Korean American population). Analyzing the Mobility Metrics and consulting with key stakeholders such as nonprofits and community-based organizations can help you to figure out who these groups are if you don't already know.

- Take time to learn about the community's history of engagement or disengagement.** Before beginning community engagement, it is important for the Community Engagement Lead to learn about what efforts have been conducted in the past and how these were perceived by the community. The Mobility Action Planning process does not exist in a vacuum, and it is important to understand whether there has been an absence of community engagement or if the people you are seeking to engage have been *over*engaged or *over*researched and may suffer from participation fatigue. Both of these realities may lead to community members feeling skeptical of new engagement efforts or distrusting power-holders in the community. The guidebook "[Why Am I Always Being Researched](#)" from Chicago Beyond is a great resource to learn about how to shift the power dynamic in the way community organizations, researchers, and funders uncover knowledge. Another reason to learn about the community's history of engagement is so that you can build off of learnings from those efforts to launch your round of engagement. When doing this, you should be clear about what is unique or additive about this community engagement effort.



The *Investing in Us: Resident Priorities for Economic Mobility in Detroit* report by the University of Michigan's Poverty Solutions research center is an example of how to learn about what the community wants without conducting new community engagement activities. Instead of starting a process from scratch, the researchers acknowledged that Detroit residents had been sharing their thoughts on their city in a variety of public spaces over the last few years and worked to gather and summarize these thoughts from 129 neighborhood-level plans, 60 citywide plans, news articles, YouTube videos, and public meeting recordings.

- Prepare thoroughly for community engagement work.** The Fresno DRIVE Race Equity Plan makes the key point that "a precondition for community engagement is 'readiness' in terms of critical capacities (e.g., organizational capacities, funding, human resources, and infrastructure, such as space)."<sup>12</sup> Before engaging community members, ensure your team has thoughtfully and appropriately prepared for what is needed. This includes budgeting for community engagement activities, bringing in community partners to help facilitate if needed, coordinating engagement

activity schedules with external partners so you don't confuse residents, and securing locations for in-person engagement activities. The Community Engagement Lead or others responsible for this work should have experience conducting **deep and meaningful community engagement**, and if they do not, the Mobility Coalition should consider how to develop this capacity or how to partner with external organizations that already have these skills.

- **Facilitate ongoing engagement.** One of the most common mistakes that local governments can make when doing community engagement is engaging community members too *late* in the decisionmaking process and not following up to share how the engagement shaped these decisions, if at all. You've probably heard complaints from community members during town hall meetings because the government is presenting an already-baked plan that won't really be changed based on community members' perspectives. Rather than just gathering feedback on a settled plan, conduct community engagement early and often. Implementing an input-design-feedback-action loop is critical for designing interventions that are responsive to the priorities of your community.
- **Center racial equity in the engagement and Mobility Action Planning process.** Decades of racist policies, discriminatory practices, and redlining have led to disinvestment in communities of color. The harms of disinvestment have been compounded by the failure of government planners and other key stakeholders to engage residents of color in policy and planning decisions. Redressing these wrongs requires an intentional focus on racial equity at every step of the engagement and development process. This includes ensuring that outreach to potential participants reaches households that represent the demographics and diversity of the city or county, learning about historical inequities in your community, uncovering implicit biases and assumptions that community leadership may hold, and working to share power in the decisionmaking process.
- **Prepare everyone to participate meaningfully in the engagement.** To create a more equitable experience for those involved in the community engagement process, people must feel they are well prepared for the experience and know what to expect. Residents should be provided with the training and resources they need to participate in strategic planning discussions and with time to become comfortable with topics before being asked to engage. Facilitators should also take care to provide as much transparency as possible about how notes will be recorded and shared so that participants understand what will happen with the information they share.
- **Treat people with lived experience as the experts.** So often when community members with lived experiences of discrimination, racism, and structural disadvantage are asked to participate in community engagement activities, they are paid paltry sums of money for their participation or entered into lotteries for prizes where not everyone who participates will receive compensation. Yet these individuals *are* your subject matter experts and should be treated as such. Plan to compensate participants as if they were consultants on your projects. Of course, compensating participants fairly and in a timely manner requires that these costs have been budgeted for at the beginning of the work. Aside from compensation, you should also provide transportation or transit passes for participants to get to meetings, child care during the meetings, and food.



- **Seek to redress power differences and share power among participants.** Power affects a person's community engagement experience in many ways. Race, class, age, occupation, language ability, and wealth can affect how comfortable someone feels sharing in a meeting, can create expectations about how much someone thinks their voice should be heard, and can influence what feedback facilitators take most seriously. The engagement facilitator should seek to redress power differences by sharing knowledge that one party may have with the other, making sure everyone understands the engagement process and their role in it, and utilizing unique engagement structures that upend the traditional town hall structures that limit meaningful engagement.
- **Invest in developing community members' power and autonomy and belonging.** Boosting upward mobility and achieving systems change and racial equity will only come about if community members have sustained, in-depth opportunities for engagement and can build their own power and social capital over time. To invest in developing community members, look for nonprofit and community-based organization partners to facilitate your community engagement activities who also have the capacity to build emergent leaders among the participants.

Now that you are familiar with best practices for meaningful community engagement, read on for some recommended community engagement methods.

## Data Walk

A Data Walk is a method of sharing and discussing data developed by the Urban Institute that has several objectives: to share key data and findings with community residents and program participants, to ensure a more robust analysis and understanding of the data, to help inform better programming and policies to address both the strengths and the needs of a particular community or population, and to inspire individual and collective action among community agents (Murray, Falkenburger, and Saxena 2015). Held in a public forum, a Data Walk presents data and information to a community through posters or another visual format to allow individuals to engage with, analyze, and ask questions about information relevant to their lives. These can be a great, interactive ways to invite residents, researchers, service providers, and others to engage with metrics and have conversations around what these insights mean for their community. See the Upward Mobility Cohort participant **Boone County, Missouri's Data Walk Posters** at the end of this step for examples on what these might look like.

When planning a Data Walk, make sure a broad range of voices are represented. Which subpopulations does your **Mobility Metrics** data highlight as being particularly positively or negatively affected? Are there populations not highlighted in the data that you are concerned about? Which populations or organizations may be well-positioned or empowered to act when motivated by knowledge? Which populations or organizations are likely most disenfranchised already? Are there populations that would benefit from greater insight into their community and environment? Consider personnel employed at different levels of access and area of work when soliciting organizations, service providers, businesses, and government departments.

By engaging community members in a Data Walk, you can bring to light new insights about the data that your key stakeholder partners on the Mobility Coalition don't see. Note that you may want to hold more than one Data Walk with different groups, in different locations, or at different phases of the information-gathering and analysis process.

## Survey

You might consider conducting surveys with community members, either to collect original data that can be used for analysis or to solicit input. It's important to pick a survey style and scope that suits both your goals for data collection and your capacity for implementation. Rigorous, randomized surveys can offer more information at scale from a representative sample of your community, but they can be complicated and expensive to perform. You might consider whether partner organizations host existing surveys that you can add questions to.

On the other hand, if you are not too concerned with generalizability and mainly want to use a survey to engage the community, generate useful insights, and capture ideas, less statistically rigorous approaches may be sufficient. For example, consider an opportunistic survey of people leaving a specific venue in a particular neighborhood.



Conducting a “community-engaged” survey effort takes this one step further by involving community members and residents in the design and administration of the survey. For more information about how to design and use this style of survey, consult [this Urban Institute resource](#). More considerations about surveys can be found in the **Supplementing Your Metrics: Original Survey Data** info sheet at the end of this step.

## Focus Group

Consider hosting focus groups to collect community members' thoughts on mobility and equity conditions in their community. Focus groups can be conducted independently or even incorporated into existing community events, like a Data Walk, for example. Focus groups can take many forms but may include a short presentation on the “why” and “what” of your work, what is different about this effort from previous initiatives the community may have seen or participated in, and small-group discussions on certain questions or topics led by community leaders. To make the most of your time in focus groups, you may consider sending participants a short survey ahead of time so that you can gather demographic information on them to ensure representation among your interviewees.

When conducting a focus group, you might choose to guide participants through the same questions the Mobility Coalition used to collect their thoughts on the **Mobility Metrics** data (see Step 5). Or you could repeat the intervention inventory activity from Step 6.4 to learn about the organizations, programs, and services that community members interact with that the Mobility Coalition may have missed.



**Mobility Metrics** data led Upward Mobility Cohort member **Summit County** to focus on issues related to juvenile justice and mental health. The county partnered with a marketing firm to facilitate focus groups with professionals working on these issues and supplemented those qualitative data by partnering with a survey firm to collect original data on both topics with an oversample of people experiencing poverty. The survey found people experiencing poverty had more days of poor mental health and felt less safe than residents not experiencing poverty.

Be prepared to have both a Discussion Facilitator and a Notetaker to capably guide the conversation and record as many thoughts as possible. When reviewing recordings or notes from a focus group, make sure to proactively consider which voices are loudest and whether that is inherently causing their opinions to receive more weight and attention than others. When reviewing qualitative information, always interrogate your habits and assumptions to make sure you do not perpetuate misunderstandings about why certain conditions exist. For more information about focus groups, consult this [Urban Institute resource](#).



As a research organization, the Urban Institute is required to seek Institutional Review Board (IRB) approval when conducting qualitative research with human subjects, particularly those where the research subjects are from a vulnerable population. An IRB is an administrative body established to protect the rights and welfare of human research subjects. Whether city or county governments need to submit community engagement activities for IRB approval is a bit of a gray area. However, many of the IRB requirements for research studies, such as asking participants for verbal consent to participate, sharing the benefits and risks a participant might experience from participating in the engagement, and letting a participant know what will happen with what they share (i.e., where it will be saved, who can see it) are all best practices that you should implement when doing Data Walks, surveys, focus groups, or other community engagement activities. Please see the sample **Community Member Focus Group Discussion Guide** at the end of this step to see an example of what this looks like.

## Step 6.4 Gather Other Qualitative Data to Understand the Systems and Prevailing Narratives in Your Community

Now that you have insights from key stakeholders and members of your community, you may also choose to gather other qualitative information to learn more about the systems and prevailing narratives in your community that are holding up the mobility and equity challenges. Read on for some recommended methods for gathering this information.

### Intervention Inventory

One task the Mobility Coalition may undertake is taking an intervention inventory for your jurisdiction. An intervention inventory is a comprehensive list of all the interventions that are currently operating within, or being funded by, a given jurisdiction. Here we use the term “intervention” broadly to mean policies,

programs, practices, initiatives, partnerships, and pilots. An ideal inventory should capture key information about each intervention, such as the name, description, operational scope, target audience, how it incorporates the three-part definition of mobility from poverty, whether it explicitly targets **racial equity**, and its current level of effectiveness based on its internal evaluation goals. See the **Intervention Inventory Template** at the end of this step. Later in this step, we recommend repeating this activity with community focus groups to gather additional interventions the Working Groups may have missed.

Once you are finished filling out your inventory, gather your Mobility Coalition members to discuss the inventory and determine how they align with your initial understanding of conditions in your community. Summaries formed in siloed Working Groups should be interrogated when the full coalition convenes to share insights across groups. Make sure to prioritize the identification of intersections and patterns between metrics. Address any conclusions or shifts in thinking in each Working Group's "Summary of Upward Mobility Findings," such as in the example below:



The Neonatal Health Metric for our county shows that a greater percentage of Black Non-Hispanic babies (14.6 percent) are born with low weights, which is nearly 50 percent higher than for white babies (7 percent).

To understand what our county is doing to address this disparity, we met with individuals from the following organizations:

- Community Health Administration
- Continuum of Care
- Experienced maternal and neonatal service providers
- Department of Housing and Community Development
- Office of Public Health

This group of stakeholders helped us conduct an inventory of County and external partner interventions that fall within the policy spheres affecting these metrics and helped us engage other key stakeholders and service providers to learn more. We have compiled a brief sample of insights from this stakeholder engagement:

- The County's Homeless Services Reform Act limits access to family shelters to pregnant women who are in their third trimester of pregnancy, meaning that women in their first and second trimesters are not eligible for family shelters.
- Women of color in the County enter prenatal care later than their white counterparts. Programs and practices need to improve access to and resources for early prenatal care for women of color.
- The continuum of care is good at placing pregnant women who are homeless in permanent supportive housing quickly, however, due to staffing issues in our county health department, these women have not received their prenatal counseling visits as intended.

Consider that this initial insight about low-weight births may be further informed by future insights that are uncovered as you make your way through other metrics and as you incorporate supplemental information. In the case of this disparity, once you have examined other environmental factors, it is important to reexamine your original findings with the status of those factors in mind. For example, disparities in access to quality medical care or to quality jobs with benefits (such as health insurance) are structural inequities that could be at the root of the outcome we see with low-weight births. Without identifying how these different insights inform each other and intersect, you will limit your capacity to target and design lasting, systemic, and sustainable change later on.

The steps you've taken to analyze the data and landscape your community's current interventions will likely lead you to inviting new members to the Mobility Coalition.



At this point, you might be wondering how big of a coalition is too big? Unfortunately, there is no easy answer to this. You'll need to consider how to broaden the coalition to the size that will be inclusive of the people and organizations that will be needed to identify appropriate solutions and sustain those solutions in the long term while also ensuring the coalition can meet regularly and advance the work. The larger the coalition, the more coordination and communication is needed from the Management Team.

As you home in on where you need support and expertise, and consequently invite new or different stakeholders to the table, Project Manager may find it helpful to maintain an ongoing list of active versus supplemental members. Throughout this process, continue to divide or organize the coalition in any way that is manageable and best meets the evolution of your goals and needs.

## Contextual Analysis

Contextual analysis refers to analyzing the many overlapping factors and local contexts that influence evidence-based policy decisions. In order to perform contextual analysis while evaluating the information you've collected, you ought to consider the various factors that provide *context* for the insights you examine. These include

- the greater political atmosphere;
- historical background (e.g., regulations, first-hand accounts, population change);
- the relationship between public institutions and various relevant stakeholders;
- shared assumptions and shared culture;
- organizational capacity (staffing and expertise);
- regulatory environments and the momentum of management or processes; and
- financial, technological, and infrastructural resources

To see an example of this analysis being performed in the context of political party assistance and development, see this [report](#) developed by the National Democratic Institute.

## Community Asset Mapping

Community Asset Mapping is a tool for understanding what assets exist in your city or county that are currently serving your community members' needs. Various approaches to Community Asset Mapping exist, but all are designed to capture the full landscape of opportunities, needs, and strengths in a given community. Assets may refer to institutions, infrastructure, community groups, parks, churches, grocery stores, clinics, community centers, and the talents and capacity of local residents. The key to identifying assets is to clarify what makes them valuable and for whom. Community mapping exercises are also meant to empower local residents by encouraging them to be the main spokespeople and advocate for changes or continued support. For further information about Community Mapping and a case study example of implementation, please consult the [Preston City Council Community Mapping Toolkit](#).

## Ecosystem Mapping

An “ecosystem” refers to any network of connections between various actors, such as governments, nonprofits, and various other stakeholders both in and outside your Mobility Coalition, and ecosystems are strong inputs for learning about the relationships and systems that exist in your community. Mapping an ecosystem can help you visualize and leverage local connections and may reveal touchpoints, blockages or opportunities that may not be clear to you until you better examine how and why certain parties interact the way they do.

Ecosystem mapping can also help you clarify roles and levels of contribution across a pipeline of partnership, determine gaps in grant funding, and much more. The scope and depth of your ecosystem map should depend on the key factors you are trying to identify or deconstruct. Mapping an ecosystem with the broader community can also be incredibly valuable because doing so could surface insights from various perspectives. For more information on Ecosystem Mapping methods and case studies, please see [Guide to Civic Tech and Data Ecosystem Mapping](#).

## Narrative Power Analysis

Narrative Power Analysis is a method for analyzing the narratives that currently underpin the systems of power within which they operate and breaking them down into constituent assumptions and components. It is based on the idea that people understand the world and their role within it through stories and that stories therefore have great power to either maintain the status quo or disrupt expectations of how things “should be.” See this [resource](#) from Doyle Canning and Patrick Reinsborough for more information about Narrative Power Analysis and this [worksheet](#) designed to guide this process.

## Step 6.5 Draft an Initial Summary of Upward Mobility Findings

Once you have gathered the rest of your information on community conditions, the Mobility Coalition should integrate this information with the initial quantitative analysis from Step 5 and draft your Summary of Upward Mobility Findings for your Mobility Action Plan. It will be up to the coalition to decide how to present this information, but it should be presented in a narrative format that links findings across predictors and presents how your community's systems are upholding these conditions. See samples of this text in the Upward Mobility Cohort MAPs online at <https://upward-mobility.urban.org/mobility-action-plans>.

## Step 6.6 Follow Up with Community Members to Share the Upward Mobility Findings

Once the Mobility Coalition has developed a first draft of the Summary of Upward Mobility Findings, it will be important to share them back with community members to validate them and ensure that the Mobility Coalition has accurately captured what is going on. Sharing back with community members can help bolster trust between local government and community members, foster avenues for stewardship, and create a feedback loop demonstrating the value of community knowledge for priority setting.

To validate the upward mobility insights, consider hosting another round of community engagement events across your jurisdiction. Ideally, you can recruit community members who were *already* engaged in activities to make clear that voices were heard. However, it is also appropriate to host a public meeting that is open to everyone. To recruit community members who were already engaged, ask your Community Engagement Lead or community engagement partners and facilitators to email or text people about this opportunity to reengage with the work.

All the same best practices for community engagement still apply. You should also be sure to give everyone the information they need to be well-informed about your work. This includes starting the event with a presentation of why your city or county undertook this work and what activities you conducted or data sources you inspected to learn more about conditions in your community. Be thoughtful in your presentation of the insights and honest about what you found, and be sure to highlight community assets in addition to deficits. Think of ways to share power with attendees, such as by offering community members leadership roles at the event or considering unique engagement formats, like the [World Café](#), [Fishbowl Discussion](#), or [Data Walk](#), that don't rely on the traditional town hall dynamic.

Here is a sample text or email message the Community Engagement Lead might send to community members you would like to reengage:

*Hi Melanie! This is Juan from the Forest City Upward Mobility team. You might remember me from the Helping Hands meeting that you attended a few weeks ago. I'm reaching out because we would love to engage you again for this work. On Thursday, March 19th from 7 p.m. to 8:30 p.m.,*

*we will be hosting an event to present the findings from the community engagement that you and others participated in over the past few months and from our data gathering. We hope to validate our findings to ensure that we heard what Forest City community members said and brainstorm with you about what our next steps should be. Participants will receive a \$25 grocery store gift card at the end of the event as a recognition of your expertise and insight. We will also provide a free dinner at the event. The event will be held at the 7th Ward Community Center, which is wheelchair accessible. Feel free to bring family and friends!*

Be sure to engage a skilled facilitator for the event as well as someone to take detailed notes. Short presentations are fine, but try to avoid creating an event where people in power talk *at* attendees for too long. The goal here is for the leads to listen and seek clarification and additions to the information collected. A skilled facilitator can help mediate discussions between people whose experiences are very different from one another or who may feel that their lived experience is not reflected in the information gathered. They can also help redirect as needed to keep the conversation on track.

A sample **Upward Mobility Findings Community Vetting Meeting Agenda** can be found at the end of this step.

## Step 6.7 Write the Relevant Components of Your Mobility Action Plan

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The notetakers should summarize the key takeaways from all of the above activities and synthesize them. From there, the Mobility Coalition can draft two pieces of text for your Mobility Action Plan: (1) the “How We Got Here” section, which describes the activities you undertook to learn about mobility conditions in your community, including why you decided to pursue this work and who has been involved and (2) a revised version of the Summary of Upward Mobility Findings section, which summarizes the key findings from your exploratory research that you will conduct in this step.

**MAP Component: How We Got Here**

**MAP Component: Summary of Upward Mobility Findings**

The Summary of Upward Mobility Findings should be written in a narrative format that interweaves the quantitative data with the qualitative data and tells a story about how your current mobility conditions (both good and bad) were created and are sustained, who they affect most, and what outcomes they’re leading to.



## Step 6.8 Make a Plan for Sustaining Engagement with the Community

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Now that your Mobility Coalition has begun conducting **deep and meaningful community engagement** to inform your MAP, you should plan to embed opportunities for community members to engage throughout the remainder of the process. The following sections of the guide will highlight community engagement opportunities as they arise, but the table below provides an overview of what types of engagement will be most valuable at this and subsequent steps as well as what skills and capacities community members may be able to develop through participation.

MAP Phase	Why engage residents at this phase?	Community engagement methods	Community member capacity-building
<b>Step 4: Build your coalition for systems change</b>	<ul style="list-style-type: none"> <li>▪ To give them key leadership roles throughout the entire Mobility Action Planning process</li> </ul>	<ul style="list-style-type: none"> <li>▪ Community Advisory Board</li> </ul>	<ul style="list-style-type: none"> <li>▪ Connections with community leaders</li> <li>▪ Leadership and decisionmaking skills</li> <li>▪ Negotiation</li> </ul>
<b>Step 6: Build a fuller picture of mobility conditions in your community</b>	<ul style="list-style-type: none"> <li>▪ To gather insights about why the data are what they are</li> <li>▪ To ensure a more robust analysis and understanding of the data</li> <li>▪ To uncover new information sources</li> <li>▪ To learn about gaps in the available information</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">Data Walk</a></li> <li>▪ <a href="#">Focus Groups</a></li> <li>▪ <a href="#">Community-Engaged Surveys</a></li> <li>▪ <a href="#">Community Mapping</a></li> <li>▪ <a href="#">Ecosystem Mapping</a></li> </ul>	<ul style="list-style-type: none"> <li>▪ How to analyze data tables, charts, and maps and research the history of structural barriers to mobility in their community</li> <li>▪ See a fuller picture of their community—beyond just their own day-to-day experience</li> <li>▪ Learn about which systems may be influencing their well-being and opportunities</li> </ul>
<b>Step 7: Determine your strategic actions</b>	<ul style="list-style-type: none"> <li>▪ To understand how community members would prioritize local challenges</li> <li>▪ To better allocate funding and resources</li> <li>▪ To build trust in government</li> <li>▪ To uncover unique solutions to community challenges</li> <li>▪ To solicit feedback on an intervention’s design and implementation</li> <li>▪ To develop early buy-in for the strategies that will be proposed in the MAP</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">Community Visioning</a></li> <li>▪ <a href="#">Youth Council</a></li> <li>▪ <a href="#">World Café</a></li> <li>▪ <a href="#">Crowdsourcing</a></li> <li>▪ <a href="#">Focus Groups</a></li> </ul>	<ul style="list-style-type: none"> <li>▪ Social networks</li> <li>▪ The power to influence the overarching goals of this project and how resources are allocated</li> <li>▪ Learn about government policymaking levers, jurisdictions, budgets, and processes</li> <li>▪ Have real opportunities to create and shape policy</li> </ul>

MAP Phase	Why engage residents at this phase?	Community engagement methods	Community member capacity-building
<b>Step 8: Develop your Measurement Plan and consider sustainability</b>	<ul style="list-style-type: none"> <li>▪ To share power and information with community members about what works</li> <li>▪ To build trust that government is seeking impact, not just new programs</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">Citizen Science</a></li> <li>▪ <a href="#">Focus Groups</a></li> <li>▪ <a href="#">Community-Engaged Surveys</a></li> <li>▪ <a href="#">Co-Producing Research</a></li> </ul>	<ul style="list-style-type: none"> <li>▪ Research and evaluation techniques</li> </ul>
<b>Step 9: Finalize and release your Mobility Action Plan</b>	<ul style="list-style-type: none"> <li>▪ To gather support for the strategies in the MAP</li> <li>▪ To help share the MAP's strategies with a wide range of community members and organizations</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">Workshopping</a></li> <li>▪ <a href="#">Citizen Juries</a></li> <li>▪ <a href="#">Social Media</a></li> </ul>	<ul style="list-style-type: none"> <li>▪ How to critically review government documents</li> <li>▪ How evaluation plans map to outcome tracking and accountability</li> <li>▪ Public speaking</li> </ul>
<b>Step 10: Sustain momentum</b>	<ul style="list-style-type: none"> <li>▪ To demonstrate accountability to the MAP's stated actions</li> <li>▪ To learn how the changes made are impacting their intended beneficiaries</li> <li>▪ To address implementation or scope challenges early on and course correct if needed</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">Community Advisory Board</a></li> <li>▪ <a href="#">Community-Engaged Surveys</a></li> </ul>	<ul style="list-style-type: none"> <li>▪ Build relationships with other community members and with government staff</li> </ul>

### **Additional Community Engagement Resources from the Urban Institute**

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- [Community Engagement During the COVID-19 Pandemic and Beyond](#)
- [Trauma-Informed Community Building and Engagement](#)
- [Fostering Partnerships for Community Engagement](#)
- [Youth Engagement in Collective Impact Initiatives](#)
- [Community-Engaged Approaches to Evaluating a Collective Impact Effort](#)
- [Community Voice and Power Sharing Guidebook](#)

By this point, your collected mobility findings should paint a holistic and comprehensive view of your community, as informed by the diversity of perspectives, data, and feedback you have solicited along the way. Step 7 will cover how to take these insights and use them to determine strategies for action.

## STEP SIX REVIEW CHECKLIST

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- The Mobility Coalition has broken into Working Groups.

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- The Working Groups have engaged key stakeholders for further insights.

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- The Community Engagement Lead and/or Project Manager has reviewed best practices in community engagement.

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- The Community Engagement Lead and/or Project Manager has used the Community Engagement Plan Template to create a plan for gathering qualitative data from members of the community.

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- The Mobility Coalition has conducted community engagement to gather further insights.

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- The Mobility Coalition has gathered other qualitative data to understand the systems and prevailing narratives in your community.

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- The Mobility Coalition has analyzed the qualitative data and integrated it with your quantitative analysis.

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- The Mobility Coalition has followed up with community members to share the full set of findings and gather additional feedback.

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- The Project Manager and/or other relevant members of the Mobility Coalition have begun drafting the How We Got Here and Summary of Upward Mobility Findings sections of the Mobility Action Plan.

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STEP SIX

# Supplemental Materials

1. Stakeholder Focus Group Discussion Guide
2. Community Member Focus Group Discussion Guide
3. Intervention Inventory
4. Community Engagement Plan Template
5. Sample Data Walk Posters: Boone County, Missouri
6. Supplementing Your Mobility Metrics: Original Survey Data
7. Upward Mobility Findings Community Vetting Meeting Sample Agenda

### Stakeholder Focus Group Discussion Guide

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1. Tell us about your organization and what programming and services you provide.
2. What populations do you primarily serve?
3. What do you think are the strengths of your organization in serving these populations?
4. In your experience, what are the best ways to connect with the populations you serve?
5. How does your organization advance upward mobility?
6. How would you say your program helps community members feel that they have power and autonomy or feel valued in community? How does it promote economic success?

This project is focused explicitly on naming and addressing racial inequities in our community. We define racial equity as both an outcome and a process. As an outcome, racial equity is when people receive just treatment, receive fair compensation for their contributions, and can reach their maximum social and economic potential regardless of race or where they live. As a process, we achieve racial equity by removing the structural barriers that prevent people of certain racial and ethnic groups from reaching their maximum social and economic potential and by meaningfully engaging these groups in decisionmaking.

7. Based on this definition, what racial inequities do you observe in your work?
8. What do you see as the biggest challenges to addressing those inequities?
9. Based on what you know about [city/county's] programs, if you could choose one program to provide greater investment to advance racial equity and bolster upward mobility, what program would that be? What, besides additional money, would that program need to thrive?
10. What populations do you think are not well served by [city/county] programs?
11. What programs in [city/county] have more demand than they can meet? What programs are underutilized? In your opinion, should these programs be eliminated, or do they need better marketing?

## Community Member Focus Group Discussion Guide

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The discussion guide below was drafted by the Washington, DC, Upward Mobility Project team for their community-based organization partners to use when facilitating community member focus group discussions. The guide includes many best practices for other places doing community engagement to replicate, including a description of the project, language to achieve the participant's consent and share information about confidentiality, information about what potential risks or benefits the participant could experience from participating in this research effort, details about where the notes from the discussion will be shared and who has access to them, and the question bank.

### I. Project Overview

The DC Upward Mobility Project is an interagency project to boost upward mobility outcomes for residents of color and align the District's programs, policies, and investments together to enhance their impacts. Through its participation in this project, the DC government is receiving technical assistance from the Urban Institute to develop and deliver a Mobility Action Plan in June 2022. The District is focusing on three priority areas for this project: housing, financial well-being, and workforce and adult education.

Our organization [insert facilitating organization name] is partnering with the DC government on this project and is working to ensure residents are engaged in the process and can share their experiences. We will facilitate today's conversation. Today, we are focusing on [insert domain of focus: housing, financial well-being, and workforce and education] programs. We will ask you questions about how you and the communities you are a part of think about topics such as prosperity from poverty and how the DC government can best support more residents to achieve prosperity through its programs, policies, and investments.

### II. Voluntary Participation & Confidentiality

Your participation in today's activity is completely voluntary and confidential. We will take notes to remember what you share, but we will not identify you by name in our notes. When our session is over, our team will summarize the information you and your fellow participants share without revealing any of your names or identities. We will keep everything that you say confidential—no one at our organization or the District will identify you by name in anything we write.

Choosing to participate or not participate will not impact your involvement in any programming or services you may be a part of in the District. Also, you can choose to leave today's activity at any point if you do not wish to continue, and you will still receive compensation for showing up today.

[If DC Government Staff are present] We are partnering with the District government for this project on upward mobility. Staff members from the District government are in attendance today to observe this activity as a part of their project support role. Staff will not share any of your personal information in relation to what you share here today.

We cannot guarantee that what you say will not be repeated by others in this discussion group, but we strongly urge each of you to respect the privacy of others in the group and not repeat anything you hear in this discussion outside the group.



[If engagement is virtual] We ask that each of you also try to give each other as much privacy as possible by minimizing how much other people around you might be able to hear or see of the conversation—maybe by going into a room with a closed door, using headphones, or otherwise finding a private space. Further, we have asked you all to log in to our virtual room today to ensure that only permitted attendees are allowed in the virtual discussion.

### **III. Risks and Benefits**

It is important that we explain any risks or benefits related to this focus group. Participating in this focus group has limited potential risks. These risks include: (1) someone could find out you participated in this focus group and (2) someone could find out what you said. However, we will not tell anyone outside our small team who participated. We will not include your name in our notes or in any report. We will not record these sessions by video or sound. Our summary of what is said here will describe people's experiences in general and will not identify you personally. When we use quotes in our reports, we will not include any details that could identify you, including your name.

The benefits of participating in this focus group include the opportunity to provide feedback on an important topic—how to increase prosperity in the District and in your community—and to possibly improve the programming and services for people who are experiencing poverty. You may also benefit from increased awareness and connections to District government and community organizations and programs. We will also provide you with [list the specific compensation provided by the facilitating organization] as a recognition for your contributions and expertise today.

### **IV. Data Security for Data Collected**

Answers from the pre-focus group surveys will be used solely for the purposes of ensuring demographic representation in the focus groups, and we will not use this information in connection with comments made in the focus group. We will take written notes today to make sure we are capturing what you share, and we will anonymize and summarize them before sharing out with any other partner agencies or Urban Institute staff and including them in any internal or public reports. Data will be summarized to highlight key findings and important metrics such as the number of people who participated in the focus group and the key demographics of the participants in the group. The DC government will store these notes in a private online drive that only project team members can access and delete them by no later than June 2022 when the project is completed.

You can choose to provide personal contact information, such as emails or phone numbers, to learn about relevant resources or connect further with our organization, but that is entirely optional. Your contact information will be kept separate from any notes or materials from today's focus group.

### **V. Consent**

Do you have any questions or concerns about what we plan to do today?

Do you consent to participate in our discussion today?

## VI. Focus Group Question Bank

[Note: Facilitator will select questions from the question bank below to form their focus groups. The questions below are all of the possible questions the facilitator could cover, and this list is comprehensive to allow the facilitator to have some flexibility in the questions they focus on. Questions tagged as “*Required*” must be asked.]

### *Questions about Self and Community*

- Tell us about yourself.
- What roles do you play in your community? [Facilitator will need to provide some context here and examples -- “I am a volunteer at my church. I am a teacher at a local school. I am active in my community garden program.”]
- Tell us about your community.
- How long have you lived in your community?
- What are some of the assets (or strengths) within your community that have been supportive to you or that you value?
- What are aspects of the community you would like to see strengthened or changed?
- What do you think it would take to strengthen your community?
- *Required:* If there was one change you would want to see in your community, what would that change be?

### *Upward Mobility Questions*

This project is focused on helping more residents achieve prosperity, and the next few questions will focus on how you and your community thinks about prosperity.

- *Required:* What does it mean to you to achieve prosperity? [Alternative question: What does it mean to you to help people out of poverty in DC?]
- Are there aspects of who you are that informs how you see prosperity?
- Are there barriers that make it harder for people in your community from achieving that prosperity?
- What has helped people in your community overcome barriers or challenges to upward mobility from poverty?

### *Program-Specific Questions*

Now we are going to discuss different [insert domain: housing, financial well-being, or workforce and education] District programs. When we talk about programs, we mean the many different programs that the District government may have, not just the programs that [name of facilitating organization] delivers or administers on behalf of the District government.

- *Required:* Are there programs that have helped you or people in your community achieve stability or upward mobility? What are those programs? [Prompts: are there [insert domain: housing, financial well-being, or workforce and education] programs that have you or people in your community achieve stability or upward mobility?
- What part of the [insert domain: housing, financial well-being, or workforce and education] program did you like the most?
- What part of the [insert domain: housing, financial well-being, or workforce and education] program did you like the least?
- What are aspects of these [insert domain: housing, financial well-being, or workforce and education] programs you would like to see strengthened or changed?
- What are your ideas on how to improve these programs? [Prompts could include the following: Are there approaches you would recommend? For example, more training for staff, increased evaluation of those programs to make sure they are reaching their goals.]
- *Required:* Are there programs or services you would like to see in your community? [Alternative: Are there gaps in existing programs or services that you would like to see addressed in your community?]
- *Required:* If you needed to find resources in your community to help yourself or a family member address a challenge, where would you start? [Alternative: Where have you gone to obtain information about resources in your community in the past?]
- What type of [insert domain: housing, financial well-being, or workforce and education] programs do you want to learn more about?

### *Wrap Up*

In our final minutes, is there anything else you would like us or the District government to know about your community or your thoughts on what it will take for everyone in your community to thrive?

We would like to share the findings from this focus group and the other focus groups that are being conducted as part of this project with you when we are finished. How would you like to be updated on the findings of this project? [Prompt: through email, paper mail, etc.]

[Facilitator will then collect contact information for participants who would like to share their information to stay updates or receive information about District programs. Facilitators will note again that this contact information will be separate from the notes taken from the focus group.]

## Intervention Inventory

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It's likely that there are already some ongoing efforts to address some of the challenges you see in the data. To learn about what work is already being done to address the mobility challenges on which you are focusing, it's important to inventory existing work related to your key priority areas. Completing this inventory will likely involve having discussions with the people responsible for each effort to learn more about them and how they're working. Please note that this inventory process may need to happen concurrently with the data analysis so that the results from both processes can be reviewed together in a timely manner.

Once the inventory has been assembled, bring together your Mobility Coalition and host a discussion about the interventions that were shared. The discussion should seek to identify strengths, opportunities, and gaps related to the specific mobility insights your information gathering has highlighted. In this discussion, consider the following:

- Has this intervention been operating long enough to see the impacts you're hoping to see?
- Is this intervention adequately targeted, resourced, or scaled to address challenges?
- Is there a gap that these interventions aren't serving (this could be a specific population, income-group, or specific neighborhood)?
- Are there linkage issues between programs that could lead to a [benefits cliff](#)?
- Are there *too many* interventions in this space that could be overlapping or causing confusion for residents?
- Are these interventions addressing the root causes of inequities?
- Are there funding or staffing opportunities or challenges that make this program either an undesirable resource or a contender for improvement?
- Are there particularly successful interventions that could be scaled, better resourced, and/or evaluated?

Intervention name	Scale	Organizational steward, host or lead	Predictor and 3-part definition alignment	Equity elements	Community engagement elements	Success measure	Evaluation
Policy							
Plan							
Program							
Project							
Practice							
Pilot							

## Community Engagement Plan Template

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Although a Community Engagement Plan is not a formal part of your Mobility Action Plan, your Community Engagement Lead may wish to draft a one to set forth the activities that the Mobility Coalition will undertake to engage community members throughout the lifetime of the Mobility Action Planning process. A Community Engagement Plan should discuss how to inclusively engage with community members with varying backgrounds and lived experience, which engagement methods will be used, who is leading the overall engagement and associated activities, how partner organizations may contribute to the engagement, and key ethical considerations for engaging marginalized community members. It should be reviewed by other members of the Mobility Coalition before it is put into action.

In preparing this plan, you will undergo the following steps:

- Phase 1: Define Your Goals
- Phase 2: Prepare for Engagement
- Phase 3: Select Your Engagement Method

### Phase 1: Define Your Goals

- Describe how engaging the community aligns with your Mobility Coalition's mission and work.
- Identify how engaging community members will contribute to your understanding of local mobility conditions.
  - Are there any specific outcomes you expect from this engagement?
  - Describe the types of community members you want to engage
- Share how you will engage a range of people throughout your community, especially communities that have experienced structural racism and those with lived experience of poverty.
  - How do you plan to identify the community members you want to engage?
  - How will you ensure that your engagement strategy reflects the geographic diversity of your community?
  - Who is often left out of these conversations, and how can you create space for them to get involved?
- Write your goals related to community engagement.
  - Are your goals specific, measurable, and realistic?
  - How will you know whether you have achieved your goals?

### Phase 2: Prepare for Engagement

- Build on previous work.

- What recent community engagement activities can you draw insights from so you don't need to repeat those exact efforts?
- Will you be reengaging community members that the Mobility Coalition has already engaged?
- How will you build on what you've previously learned?
- Describe the extent to which individuals engaged will be involved in the Mobility Action Planning process.
  - Will they gather and analyze quantitative or qualitative data?
  - Can they help you set priorities for the future or identify strategic actions for your MAP?
  - Can they help you disseminate the MAP and its recommendations once it's published?
- Describe which community engagement best practices you will use to conduct your engagement.
- Outline your plans to maintain engagement with the community throughout the lifetime of this initiative and beyond.

### **Phase 3: Select Your Engagement Methods**

- Select one or more engagement methods to use throughout your Mobility Action Planning process.
- Explain how your selection aligns with your goals.
- Describe the steps, timeline, and responsible actors for each planning and implementing each activity.
- Describe how you will follow-up with community members after the activity.
- Consider how you will train or prepare your participants so that they can participate meaningfully in the activity.
- Consider how you will compensate the participants.

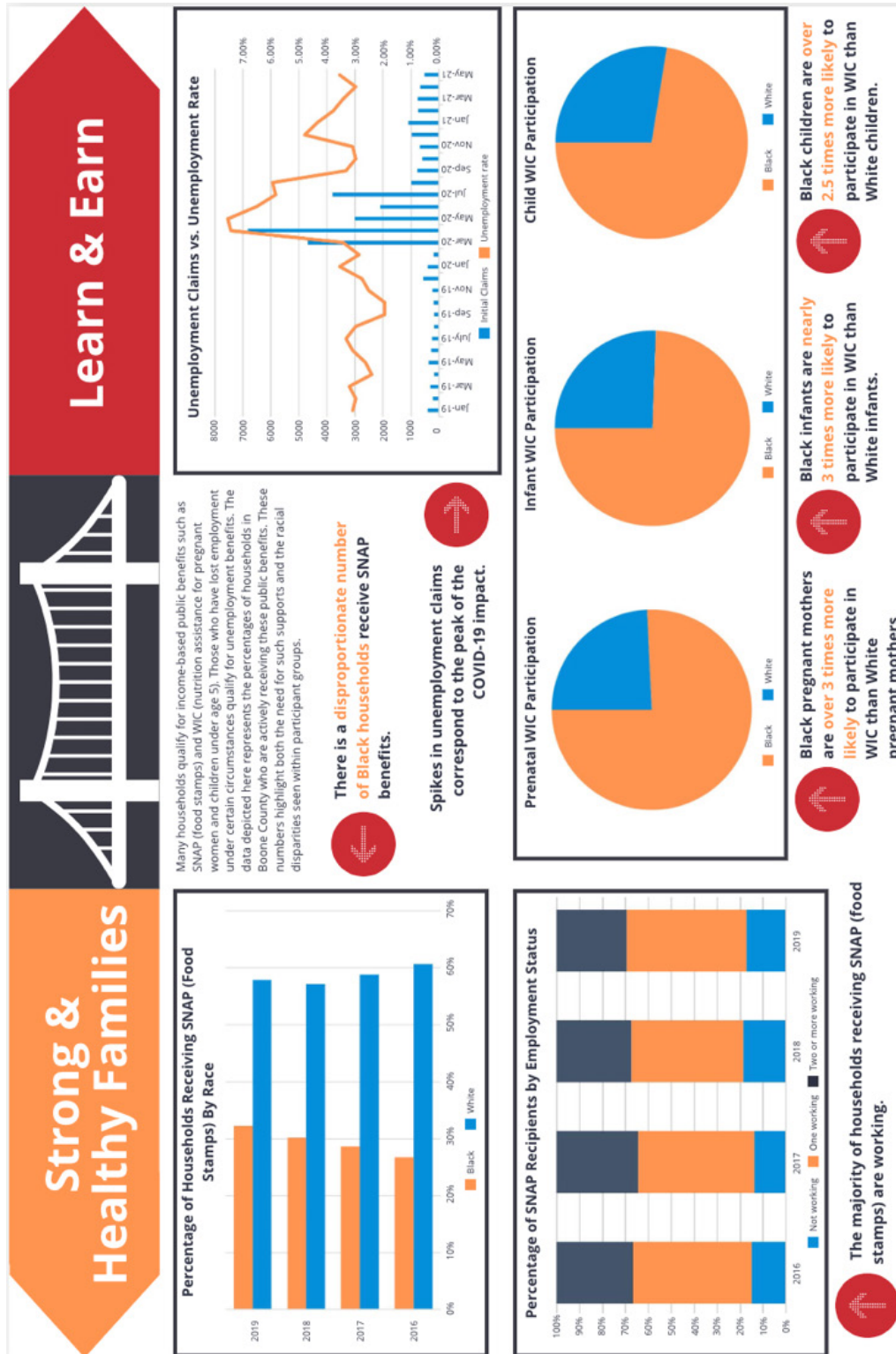


Figure 13: Data Walk posters from Boone County, Missouri



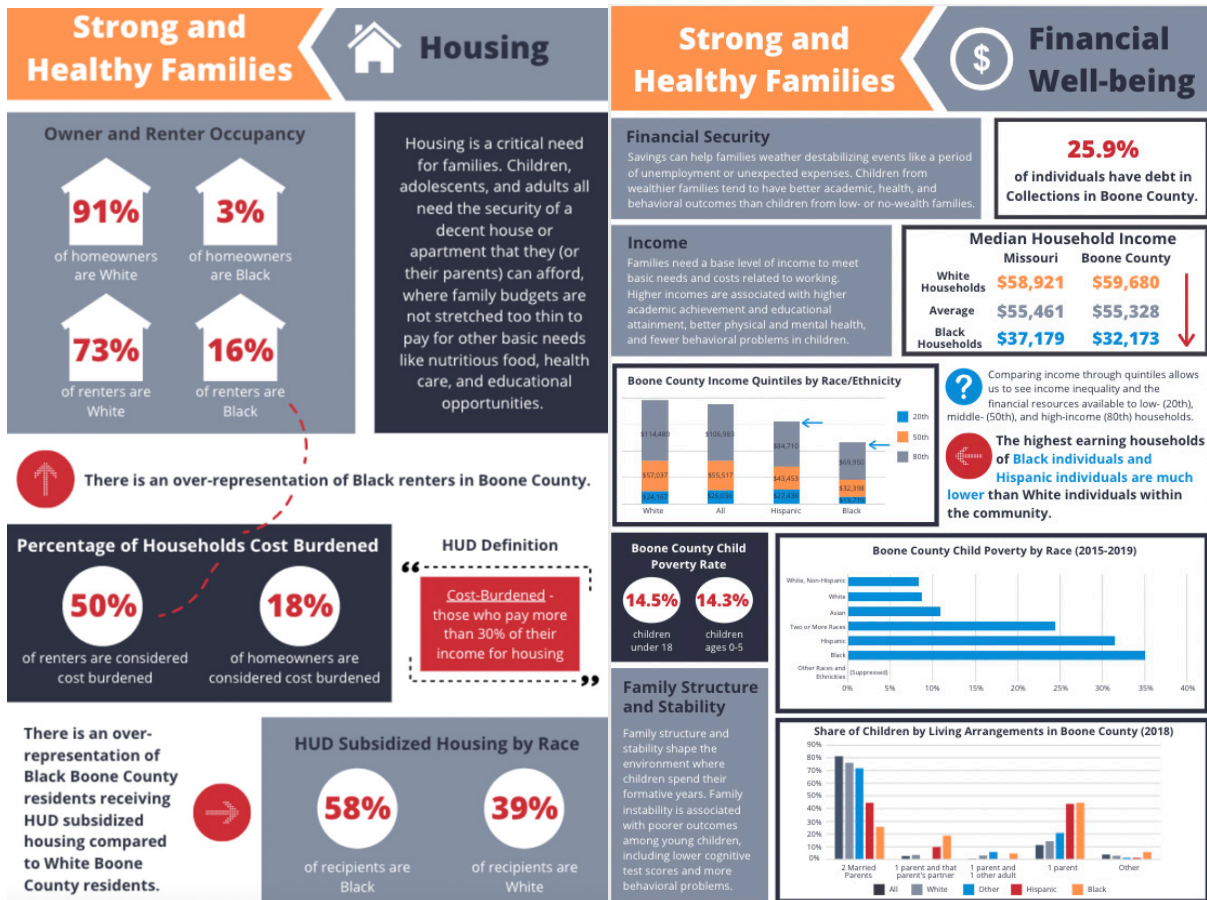


Figure 14: Data walk posters from Boone County, Missouri

## Supplementing Your Mobility Metrics: Original Survey Data

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When developing a survey, you must take the following steps:

1. **Determine what you hope to do with the data.** To inform decisions about target populations, survey modes, and scale, you must answer the following questions:
  - a. What kinds of questions do you want to ask?
  - b. Who or what groups do you want to provide information for?
  - c. How will this collected data inform future programs or interventions?
  - d. Who or what groups do you want to know more about?
  - e. For example, if you want to understand the answers to a question by race, you will need a large enough sample size for each racial subpopulation.
2. **Consider timing and incentives.** Make sure to weigh the pros and cons when deciding the length of the survey and how long it will take respondents to complete the questions. Be considerate when choosing what incentive you might be able to offer survey-takers to thank them for their participation and recognize their expertise.
3. **Consider your budget.** What range of funds do you have to spend on a survey? Will this funding be sufficient to sustain the survey effort at certain intervals (i.e., annually or every few years) moving forward? Are the data still valuable if you cannot continue to collect it over time?
4. **Consider partnerships.** By partnering with a local survey firm or university, you can get assistance in development and administration of your survey. However, you may need to develop a subcontract or data-sharing agreement to engage some partners.
5. **Consider mode of delivery.** Surveys can come in many forms, such as online; in person; or by mail, phone, or text message. Consider what survey mode will best reach the respondents from whom you want the greatest response.
6. **Consider details that improve outreach, access, and engagement.** These include foreign-language translations to improve accessibility for local immigrants or English-Language learners and proactive consideration of local expectations or political climate. Field the survey at a time of year to best suit community capacity and interest.

For further information about surveys, please consult this Urban Institute resource:

<https://www.urban.org/research/publication/preparing-and-fielding-high-quality-surveys>.

## Sample Upward Mobility Findings Community Vetting Meeting Agenda

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This sample agenda can be used to host an Upward Mobility Findings Presentation to community members.

**Date:**

**Time:**

**Location:**

**Accessibility accommodations:**

### **I. Welcome, Agenda Overview, and Goal-Setting**

Welcome participants to the meeting and thank everyone for sharing their time and expertise. Provide a high-level overview of what will happen at the meeting and share what the intended end goal is for the meeting: for community members to hear the full set of findings gathered from the various data-gathering methods and have a final opportunity to seek clarification or make additions to what was gathered. Let them know that someone will be taking notes and that they can share their contact information if they would like to receive a written copy of the final summary report. Inform them of any confidentiality protocols you have in place and whether their names will be written down when they participate today.

### **II. Upward Mobility Findings Presentation (keep to less than 20 minutes)**

Two options for facilitating:

1) Use slides to present summaries of the upward mobility findings,

**OR**

2) Hang posters around a room with the findings and let people walk around themselves in a ‘Data Walk’ format. Participants can be given sticky notes to either ask questions about the information or add an additional insight.

Remember to present the data-gathering methods that were used to gather the findings and a summary of who was involved in this effort. This is also a great place to ask partners to play a role, especially if they were engaged in leading part of the data-gathering efforts.

### **III. Discussion and Q&A**

Offer a chance for attendees to ask clarifying questions about what they’re seeing. If someone is questioning the validity or accuracy of the data, don’t get defensive—instead ask them why, based on their community’s experience, they don’t believe the data to be true. Host a discussion among the participants about what is there. Here are some sample questions:

- Do these data represent your community’s experience? Why or why not?
- Is this surprising? Why or why not?
- Is there something you would add to what we have here that you feel represents your community’s experience?

- What else would you want us to know about \_\_\_\_\_ that we haven't already captured?

#### **IV. Close Out, Thank You and Next Steps**

Thank the participants for coming. Tell them what will happen with the findings and the additional information that you gathered today and what the Mobility Coalition's next steps are. Tell them how you plan to share a copy of the findings with them and collect contact information if people would like to receive your final summary report. Let people know about what future opportunities there are to engage with the work. Make sure that service providers are present to offer people information about services or answer specific questions as they leave.