



May 30, 2025

Using the Toolkit for Increasing Upward Mobility in Your Community

Upward Mobility Initiative

Agenda and Housekeeping

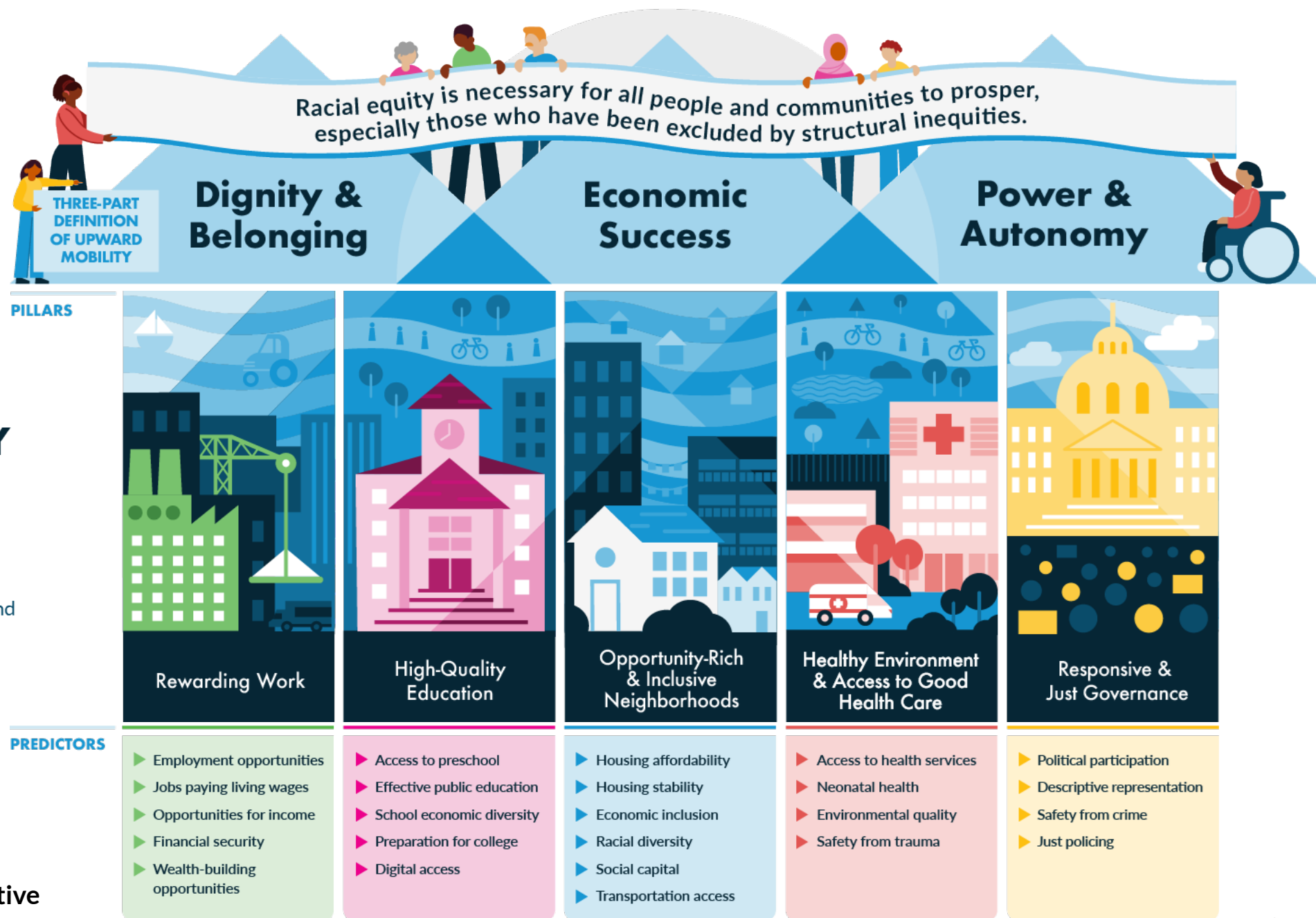
- Overview of the Upward Mobility Framework
 - Karolina Ramos, Policy Program Manager, Urban Institute
- Introducing the Toolkit for Increasing Upward Mobility in Your Community
 - Annie Heinrichs, Training and Technical Assistance Specialist, Urban Institute
- How to Use the Toolkit
 - Kiersten Vaughan, Training and Technical Assistance Specialist, Urban Institute
- Q&A
 - Please use the Q&A box as questions arise during the presentation

Overview of the Upward Mobility Framework

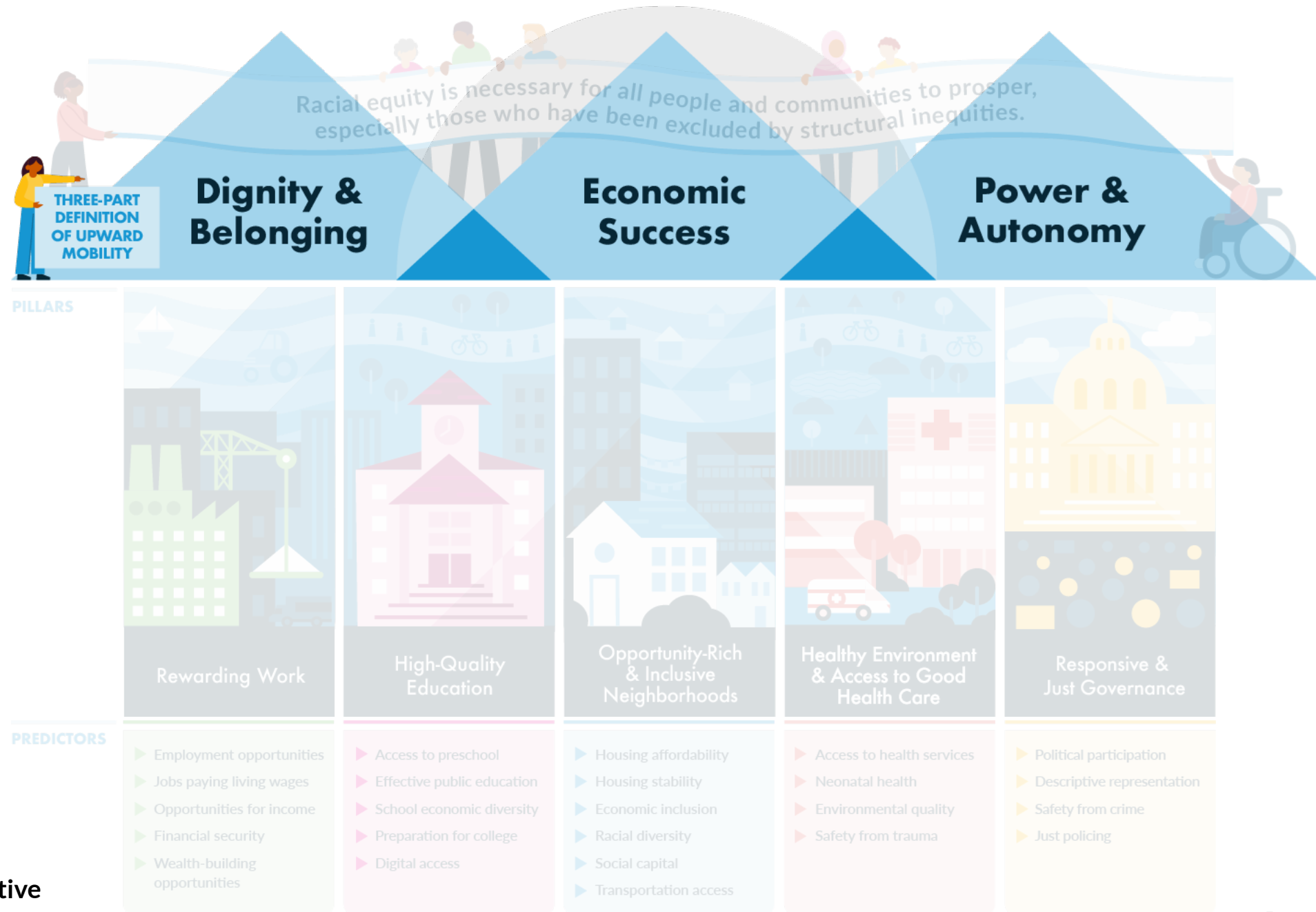


UPWARD MOBILITY FRAMEWORK

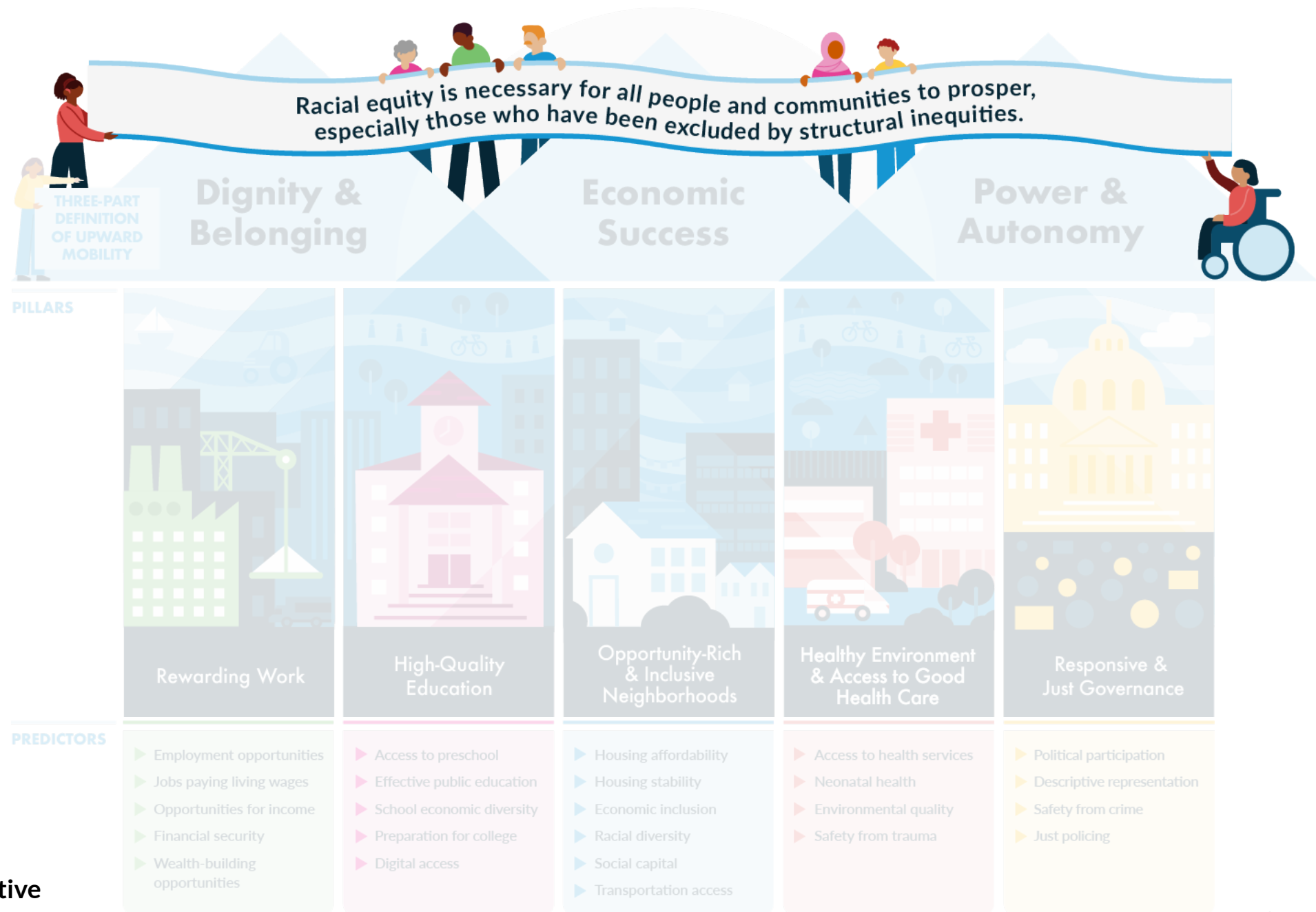
The Urban Institute's evidence-based foundation for community efforts to expand prosperity and narrow racial inequities.



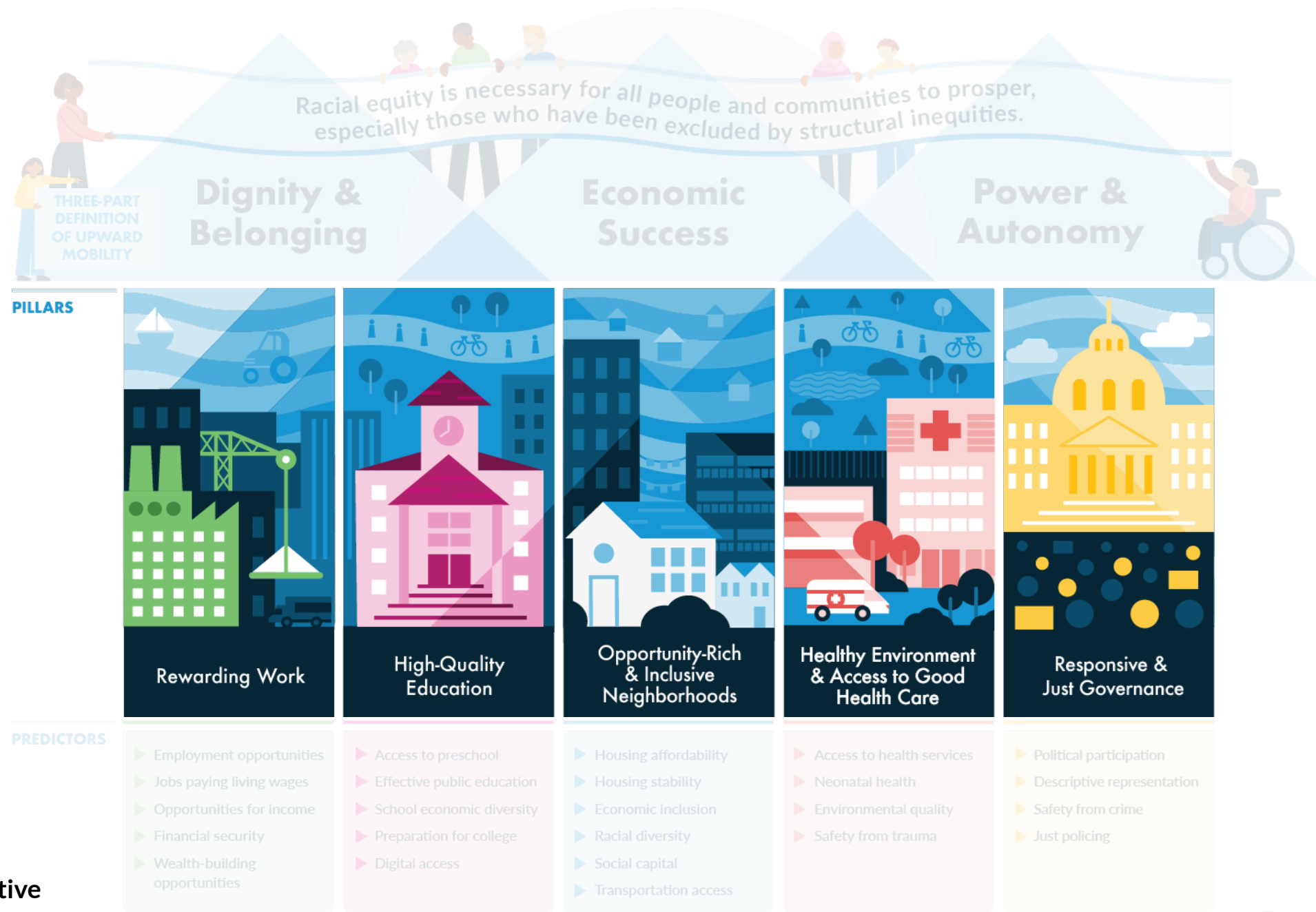
The Three-Part Definition



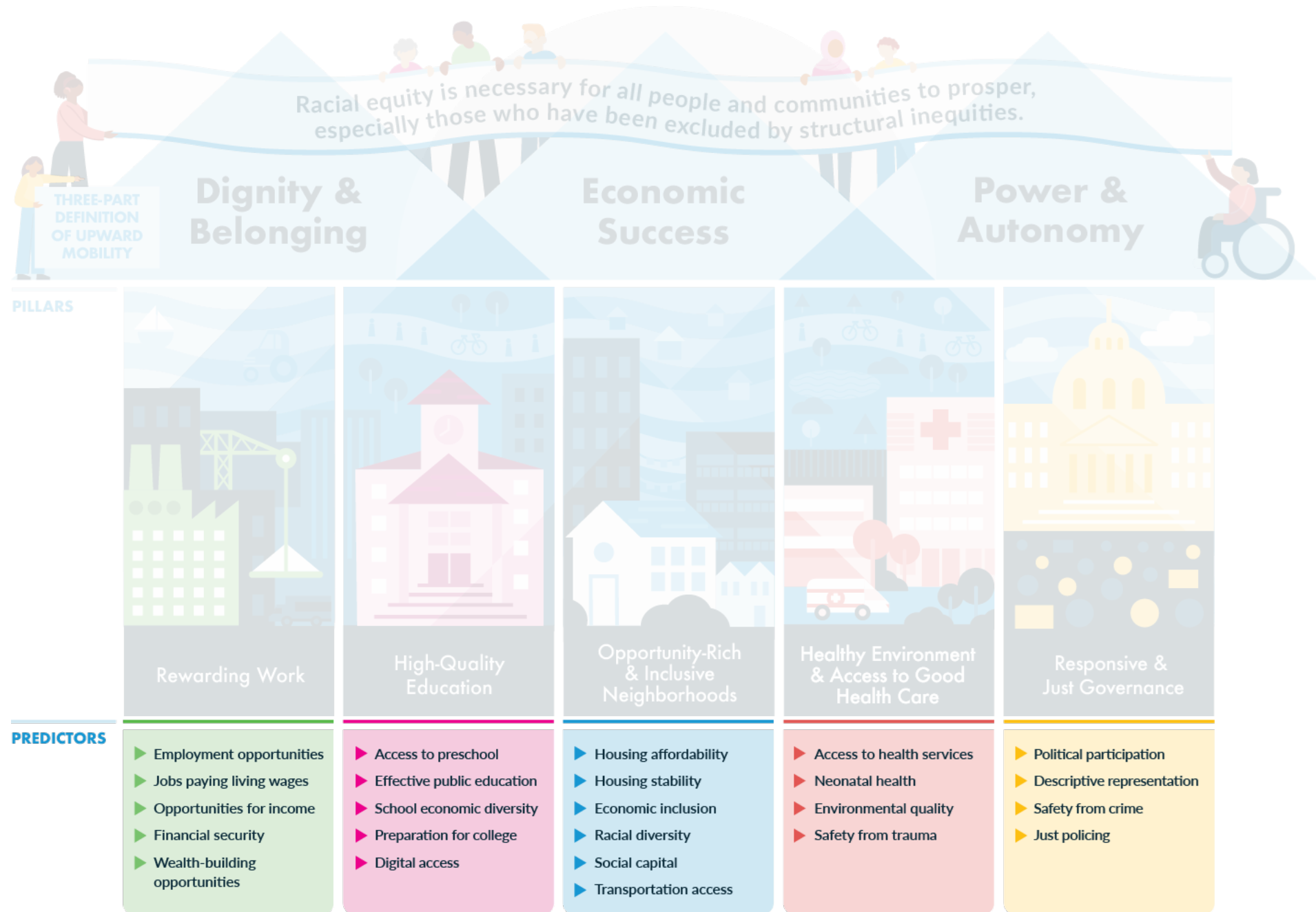
Focus on Racial Equity



The Pillars



The Predictors



Introducing the Toolkit for Increasing Upward Mobility in Your Community



Toolkit for Increasing Upward Mobility in Your Community

Introduction

1. Embarking on an Upward Mobility Planning Process
 2. Building a Cross-Sector Mobility Coalition
 3. Engaging Community Members in Planning and Decisionmaking
 4. Using Data to Gain a Shared Understanding of Local Mobility Conditions
 5. Identifying Strategic Actions for Systems Change
 6. Measuring Your Coalition's Impact
 7. Sustaining Upward Mobility Initiatives
- Acknowledgements
Resources



Introduction

Published April 29, 2025

Helping people achieve long-term social mobility and economic prosperity is one of the biggest challenges of our time. Stagnating rates of economic mobility in recent decades have cast doubt on the promise that talent and hard work lead to advancement.

[Research shows](#) that adults with the lowest incomes are unlikely to rise to the middle of the income distribution, much less to the top. And significant racial disparities persist in rates of intergenerational economic mobility, particularly between Black and white Americans.

If you are driven to increase upward mobility from poverty in your community but wondering where to start, this toolkit is for you. Bringing about the systemic changes necessary to boost upward mobility and advance racial equity is no simple task, and large-scale change will require concerted action from a coalition of stakeholders across the public, private, and community sectors.

Building on [Boosting Upward Mobility: A Planning Guide for Local Action](#), this toolkit walks through multiple pathways that local actors—whether leaders of community-based organizations, members of local government, or concerned citizens—can pursue to begin catalyzing change. [Read the acknowledgments](#) to learn more about how this toolkit was created.

Digital resource building on [Boosting Upward Mobility: A Planning Guide for Local Action](#) (originally published November 2022)



Anchored in 6 principles, based on our research, our experience working with actors trying to achieve structural change, and our learnings from people with first-hand experience of poverty:

Equity and
Racial Justice

Systems
Change

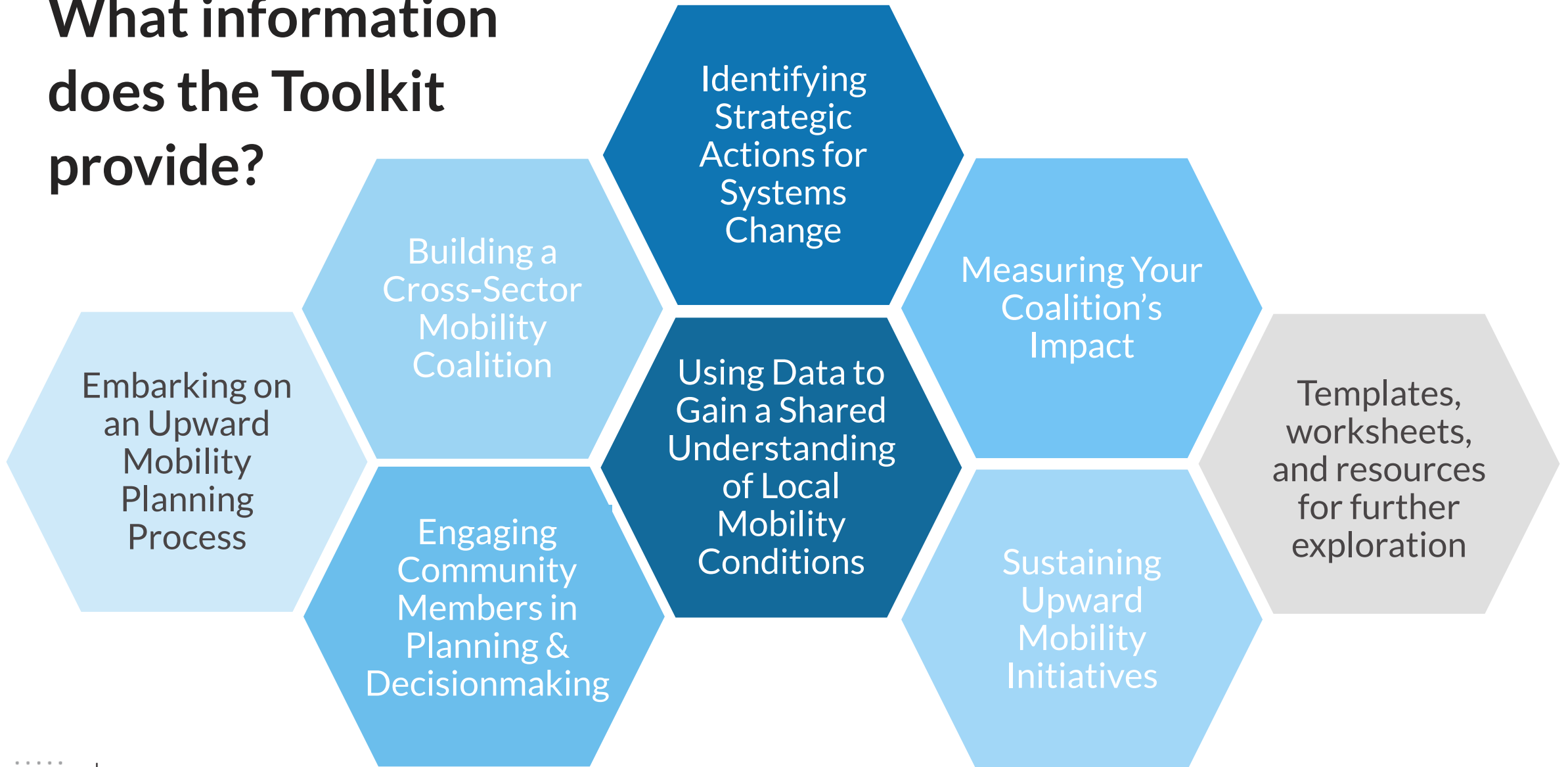
Cross-Sector
Collaboration

Community
Engagement
and Ownership

Data-Informed
Decisionmaking

Continuous
Learning

What information does the Toolkit provide?



Who can use the Toolkit?

LOCAL GOVERNMENTS

COMMUNITY MEMBERS

NONPROFITS AND
COMMUNITY-BASED
ORGANIZATIONS

ADVOCACY GROUPS



PHILANTHROPY

RESEARCH ORGANIZATIONS

ANCHOR INSTITUTIONS

PRIVATE SECTOR

How to Use the Toolkit



Where are you on your upward mobility journey?

You are just getting started

You want to better understand mobility conditions and needs in your community

You want to identify and measure the impact of interventions on mobility

You want to find ways to sustain your work

Chapters 1 & 2

Chapters 3 & 4

Chapters 5 & 6

Chapter 7





You are just getting started

Chapter 1: Embarking on an Upward Mobility Planning Process

- Assessing your readiness
- Getting commitments from local leaders
- Developing a mobility action plan

Chapter 2: Building a Cross-Sector Mobility Coalition

- Identifying necessary collaborators
- Designing and structuring your coalition
- Recruiting members and ensuring sustainability

Resource Spotlight



UPWARD MOBILITY
INITIATIVE



TOOLKIT FOR INCREASING UPWARD MOBILITY IN YOUR COMMUNITY

Assessing Existing Programs for Alignment with the Upward Mobility Framework

This worksheet is part of the Upward Mobility Initiative's [Toolkit for Increasing Upward Mobility in Your Community](#). Use it to understand whether existing programs in your community embody the principles and factors that evidence shows boost mobility from poverty.

How to Use This Assessment

Select a program operating in your community that is intended to support mobility from poverty. Respond to the series of questions below in the spaces provided. Terms in **bold** text are defined in footnotes. Once you have finished responding to the questions, review your responses to identify areas of strength and elements the program might be lacking. You can find additional resources for each of these question groups at the end of the document.

Keep in mind that individual programs are insufficient for boosting mobility from poverty. Rather, places seeking to increase upward mobility and advance racial equity must be prepared to make transformative, [systems-level changes](#). The goal of this assessment is to understand whether your community's program environment is suitable and to what extent it can bolster mobility from poverty and advance equity.

This assessment is not an evaluation tool and will not tell you whether programs are succeeding in boosting mobility from poverty. Organizations interested in understanding the answer to this question might



Upward Mobility Initiative



Resource Spotlight



UPWARD MOBILITY
INITIATIVE



TOOLKIT FOR INCREASING UPWARD MOBILITY IN YOUR COMMUNITY

Identifying Potential Coalition Members

This worksheet is part of the Upward Mobility Initiative’s [Toolkit for Increasing Upward Mobility in Your Community](#). Use it to brainstorm a list of potential partner organizations to invite to your Mobility Coalition. Cast a broad net and consider organizations already doing upward mobility-related work, organizations you may not have worked with before, and organizations that 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 understanding of your local mobility conditions and returned to once you’ve conducted a more comprehensive analysis (see [chapter 2](#) for additional guidance).

Part 1: Identify Your Coalition’s Needs

Which of the following groups in your community face the greatest barriers to upward mobility?

- ☐ People of color
Specific racial or ethnic group(s) _____
- ☐ People with disabilities
- ☐ English-language learners
- ☐ People experiencing housing instability or homelessness
- ☐ Young people
- ☐ People involved in the criminal legal system





You want to better understand mobility conditions and needs in your community

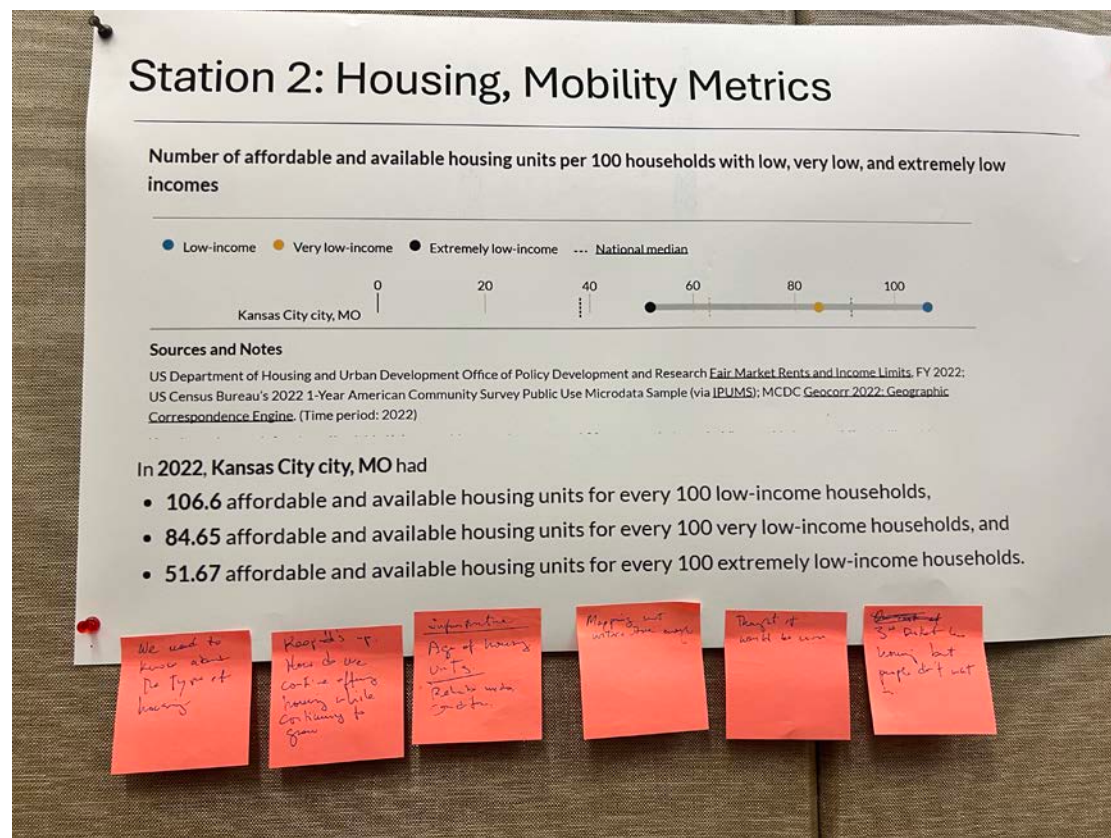
Chapter 3: Engaging Community Members in Planning and Decisionmaking

- When and why to engage community members
- Best practices and methods for community engagement

Chapter 4: Using Data to Gain a Shared Understanding of Local Mobility Conditions

- Using the Mobility Metrics
- Gathering and analyzing quantitative and qualitative data

Community Spotlight: Kansas City, MO





You want to identify and measure the impact of interventions

Chapter 5: Identifying Strategic Actions for Systems Change

- Developing a community vision statement
- Understanding how current systems impact upward mobility
- Creating a logic model and theory of change

Chapter 6: Measuring Your Coalition's Impact

- Developing a measurement plan
- Measuring systems change
- Communicating your impact



Resource Spotlight

Developing a Theory of Change for Your Upward Mobility Work

PROBLEM

What problem are you trying to solve?

EXAMPLE

Many people in our community are financially insecure and unable to access health care, housing, transportation, and other basic needs



SOLUTION

How do you plan to address the problem?

EXAMPLE

We will launch a campaign to pass a local living wage ordinance and establish programs to attract and retain health care providers



IMPACT

How will you know if your efforts are successful? (i.e., how will your strategies achieve your desired outcomes?)

EXAMPLE

In the **medium term**, more jobs will pay living wages and there will be more health care providers serving our community.

In the **long term**, residents will be healthier and have greater levels of well-being

FORMULA

In order to [insert your problem statement], we will [insert your strategies], which will lead to [insert your medium-term outcome(s)], thereby [insert your longer-term outcomes(s)].

THEORY OF CHANGE STATEMENT

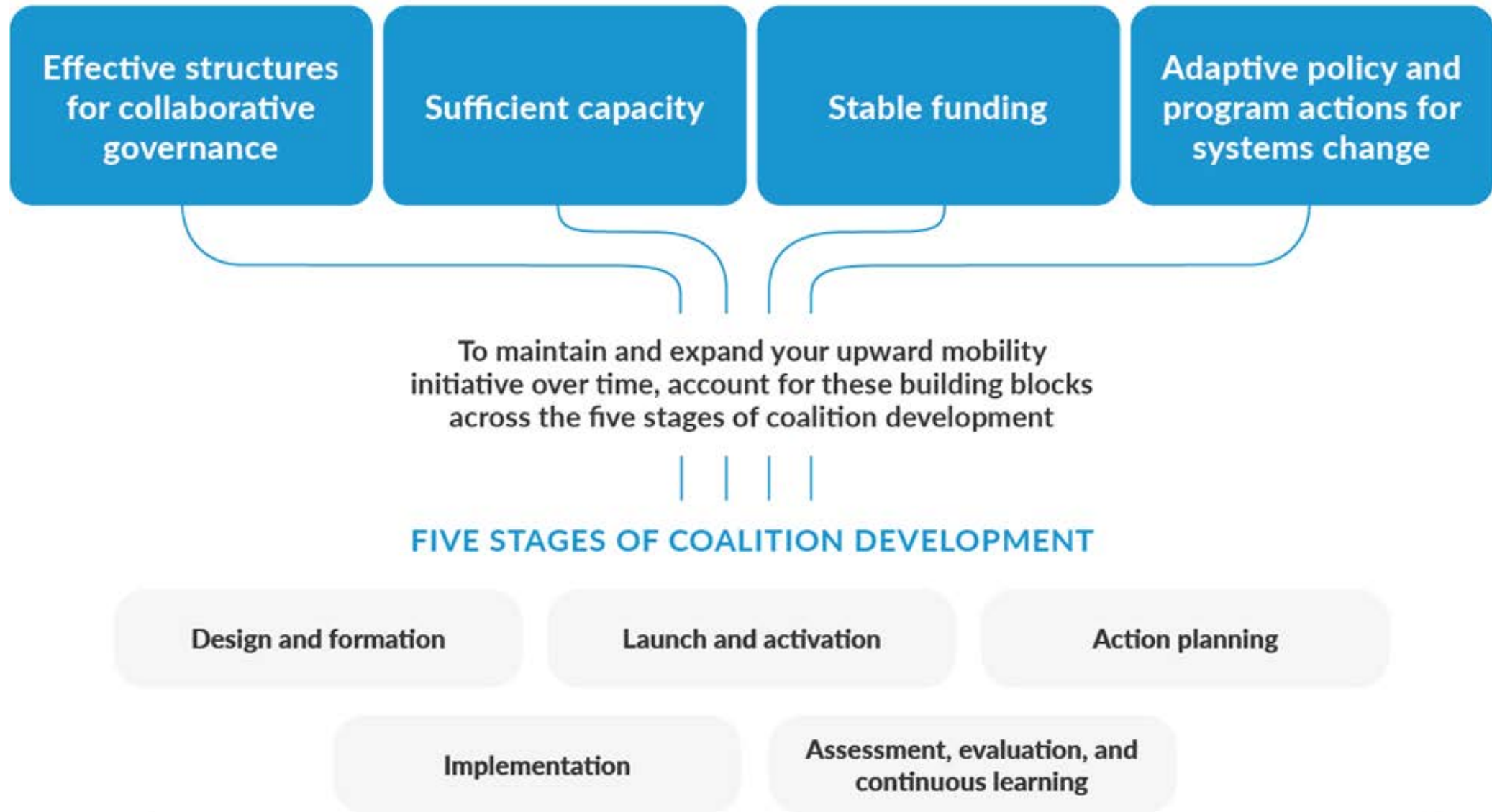
In order to ensure that people in our community can achieve financial security and meet their basic needs, we will launch a campaign to pass a local living wage ordinance and establish programs to attract and retain health care providers, which will lead to increases in the number of jobs paying living wages and the number of health care providers serving our community, thereby helping residents achieve greater levels of health and well-being.



You want to find ways to sustain your work

Chapter 7: Sustaining Upward Mobility Initiatives

- Developing a strategy for sustaining your work through:
 - Effective structures for collaborative governance
 - Sufficient capacity
 - Stable funding
 - Adaptive policy and program action for systems change



Beginning Your Sustainability Planning Process

- Recommendations at this stage
 - Formalize your coalition management structure, and consider orienting around a backbone organization
 - Create a community advisory board or resident leadership council
 - Find ways to celebrate success and recruit new partners
 - Seek local data partners
 - Look for areas of overlap with your local government strategic plans
 - Cultivate local champions among policymakers, nonprofit organizations, community-based leaders, and others

Ways to Formalize Your Local Mobility Work

- Drafting a resolution
- Launching a public Mobility Action Plan
- Advocating for an upward mobility office or coordinator role



Q&A





Upward Mobility Initiative Resources & Upcoming Events

- Visit upward-mobility.urban.org
- Subscribe to our [newsletter](#)

Contact us! Email upwardmobility@urban.org to reach our team.



Survey!



Scan me! or visit

<https://app.smartsheet.com/b/form/19f9ff728f694435b4da8499658f2af3>



Thank you!

