



APRIL 24, 2026

# Getting Started on Upward Mobility: Tools and Strategies for Local Leaders



Upward Mobility Framework

## Agenda



Overview of Upward Mobility Initiative's Key Tools and Resources



Perspectives from Local Leaders



Building Blocks for Launching & Sustaining Local Collaboration and Collective Action



Available Resources and Future Trainings



# History of the Upward Mobility Framework





What would it take to dramatically  
increase **mobility from poverty**?



THREE-PART DEFINITION OF UPWARD MOBILITY

PILLARS



Rewarding Work



High-Quality Education



Opportunity-Rich & Inclusive Neighborhoods



Healthy Environment & Access to Good Health Care



Responsive & Just Governance

PREDICTORS

- ▶ Employment opportunities
- ▶ Jobs paying living wages
- ▶ Opportunities for income
- ▶ Financial security
- ▶ Wealth-building opportunities

- ▶ Access to preschool
- ▶ Effective public education
- ▶ School economic diversity
- ▶ Preparation for college
- ▶ Digital access

- ▶ Housing affordability
- ▶ Housing stability
- ▶ Economic inclusion
- ▶ Racial diversity
- ▶ Social capital
- ▶ Transportation access

- ▶ Access to health services
- ▶ Neonatal health
- ▶ Environmental quality
- ▶ Safety from trauma

- ▶ Political participation
- ▶ Descriptive representation
- ▶ Safety from crime
- ▶ Just policing

**UPWARD MOBILITY FRAMEWORK**

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



Upward Mobility Framework



# The Three-Part Definition





# Focus on Racial Equity



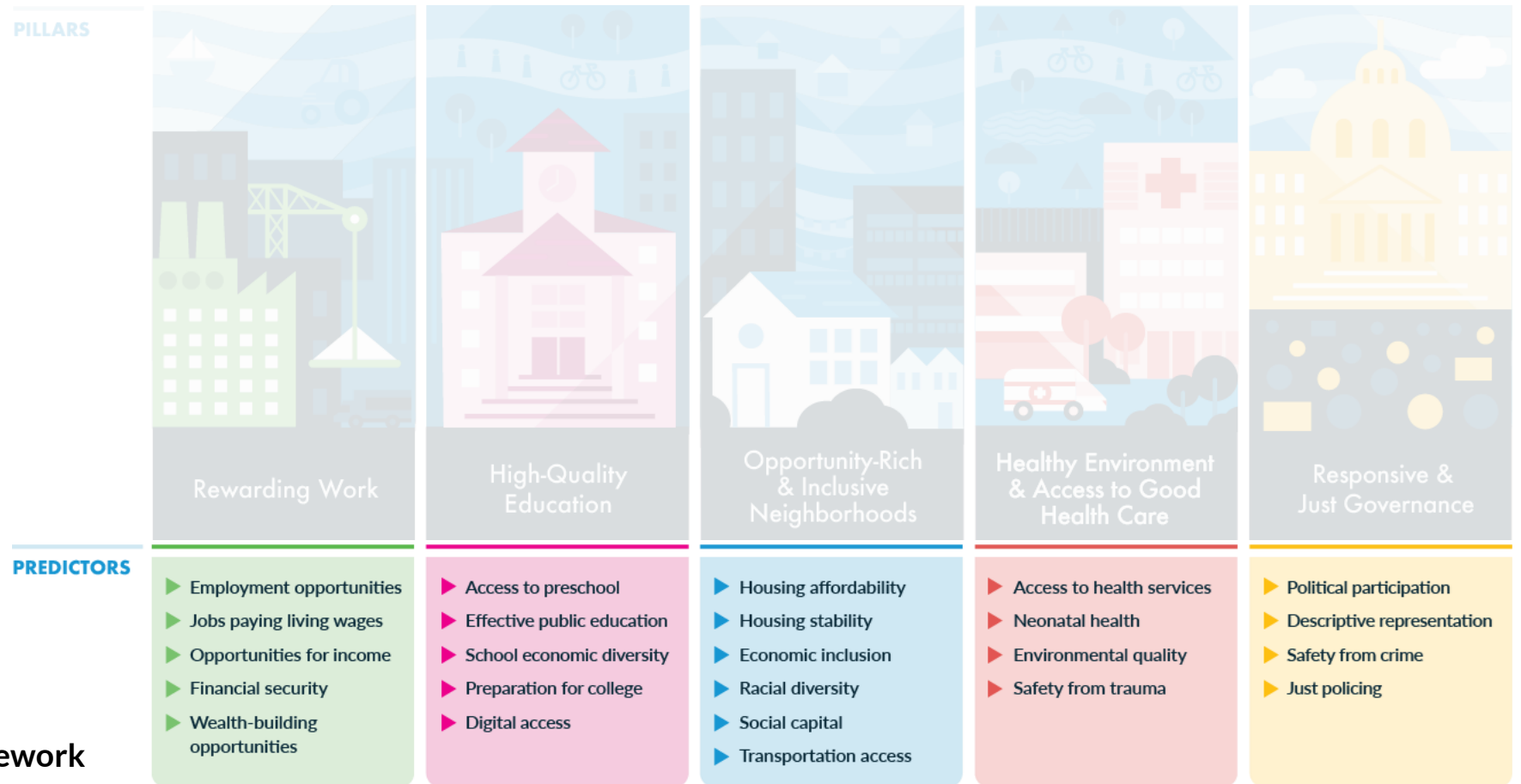


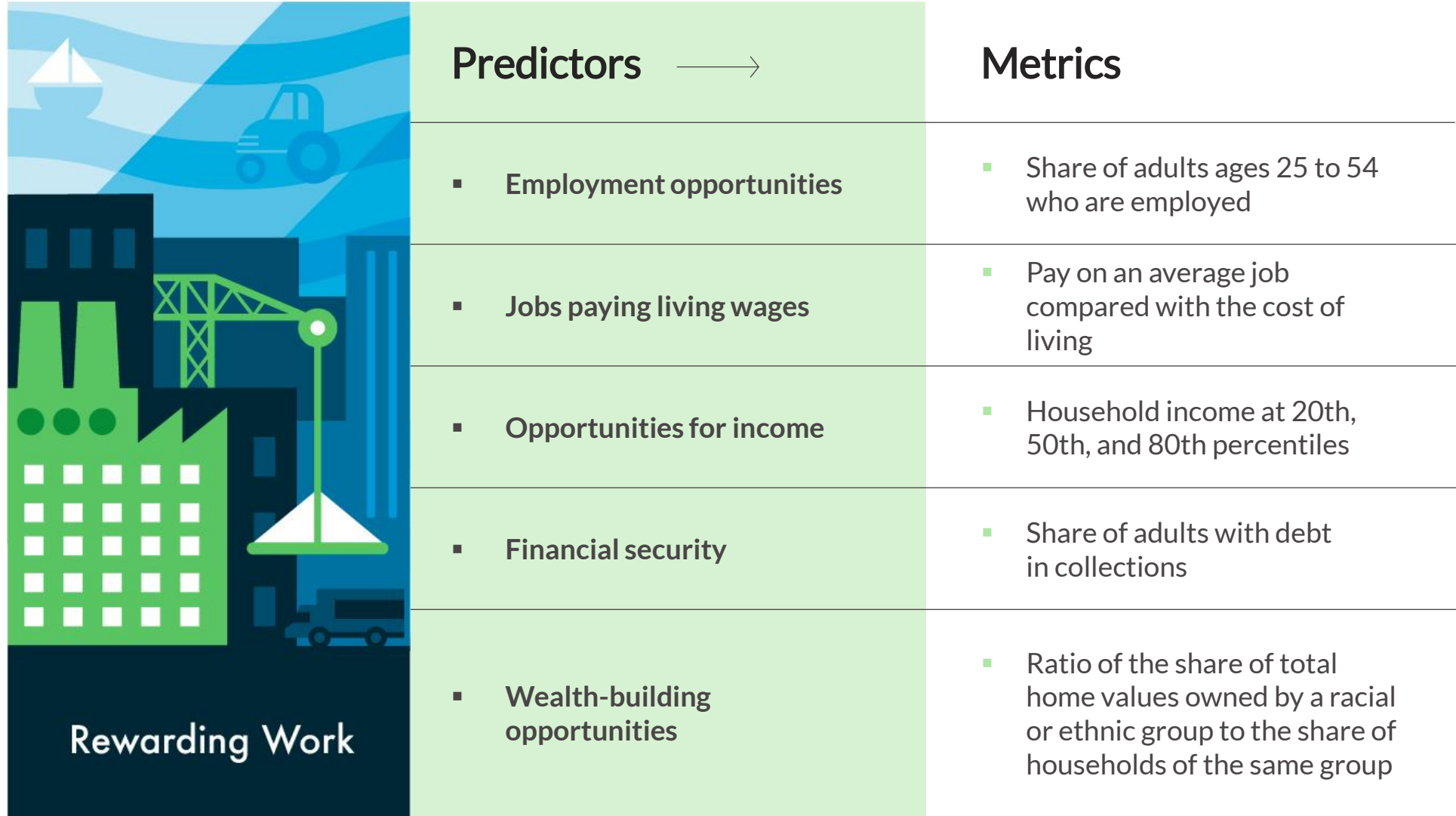
# The Pillars





# The Predictors





# The Upward Mobility Data Dashboard



Search for specific communities

The screenshot shows the search interface of the dashboard. It features a search bar with the placeholder text "Type the name of a city or a county". Below the search bar, there are several dropdown menus for selecting predictors or pillars. The selected predictors are listed as "Selected predictors: 24 / 24". The predictors include: Rewarding Work (5 / 5), High-Quality Education (5 / 5), Opportunity-Rich & Inclusive Neighborhoods (6 / 6), Healthy Environment and Access to Good Health Care (4 / 4), and Responsive and Just Governance (4 / 4). A "SEARCH" button is located at the bottom of the interface.

Investigate regional trends

The screenshot shows the regional trends interface. It features a map of the United States with a blue overlay indicating the share of adults ages 25 to 54 who are employed. The map is titled "Share of adults ages 25 to 54 who are employed". The interface includes a "SELECT A PREDICTOR" dropdown menu, a "REWARDING WORK" section, and a "Map" button. The map shows a distribution of employment opportunities across the country, with a legend indicating the share of adults ages 25 to 54 who are employed.

Explore national distributions

The screenshot shows the national distributions interface. It features a bell curve chart representing the distribution of the share of adults ages 25 to 54 who are employed. The chart is titled "Share of adults ages 25 to 54 who are employed". The interface includes a "SELECT A PREDICTOR" dropdown menu, a "REWARDING WORK" section, and a "Chart" button. The chart shows a distribution of employment opportunities across the country, with a legend indicating the share of adults ages 25 to 54 who are employed.



# What can the Mobility Metrics data help you do?

## Diagnosis

Compare

Reveal

Prioritize

Highlight  
Interconnections

## Tracking

Set Targets

Monitor



# The Upward Mobility Data Dashboard

[Return to dashboard](#)

### Select predictors or pillars

Selected predictors: 1 / 24

[Select All](#) | [Clear All](#)

**Rewarding Work (1 / 5)** ▲

[Select All](#) | [Clear All](#)

- Employment opportunities
- Jobs paying living wages
- Opportunities for income
- Financial security
- Wealth-building opportunities

**High-Quality Education** ▼

**Opportunity-Rich & Inclusive Neighborhoods** ▼

Viewing: [Clear Locations](#)

Prince George's County (MD) × Start typing... 🔍

1/6 [Don't see your city? Learn how to access data for smaller cities.](#) >

SUGGESTED PEERS FOR Prince George's County (MD) ⓘ ▼

[TOUR THIS PAGE](#) [EXPAND ALL DATA CARDS](#) [Export All Data](#) ↓

REWARDING WORK | **Employment opportunities** | [Expand This Card](#) >

#### Share of adults ages 25 to 54 who are employed

● Share    ● National median

Location	Share of adults ages 25 to 54 who are employed
Prince George's County, MD	~82%
National median	~80%

# The Predictors



## Rewarding Work

- Employment opportunities
- Jobs paying living wages
- Opportunities for income
- Financial security
- Wealth-building opportunities



## High-Quality Education

- Access to preschool
- Effective public education
- School economic diversity
- Preparation for college
- Digital access



## Opportunity-Rich and Inclusive Neighborhoods

- Housing affordability
- Housing stability
- Economic inclusion
- Racial diversity
- Social capital
- Transportation access



## Healthy Environment and Access to Good Health Care

- Access to health services
- Neonatal health
- Environmental quality
- Safety from trauma



## Responsive and Just Governance

- Political participation
- Descriptive representation
- Safety from crime
- Just policing

# How can you get started?



# Resource: Toolkit for Increasing Upward Mobility in Your Community



UPWARD MOBILITY  
INITIATIVE



## TOOLKIT FOR INCREASING UPWARD MOBILITY IN YOUR COMMUNITY

### Overlaying Demographic Data to Understand Potential Disparities

This worksheet is part of the Upward Mobility Initiative's *Toolkit for Increasing Upward Mobility in Your Community*. Use it to understand what to do when you can't find data disaggregated by characteristics of interest. We use race/ethnicity in the example, but this method also applies to other characteristics, including gender, age, disability status, and more.

One option for understanding potential disparities when examining data that can be disaggregated by subgeography, but not by race/ethnicity or other important characteristics, is to visualize it on a map. By overlaying demographic data, we can examine variations or disparities that might trigger new questions or hypotheses.

The maps below present an example of how you might do this—they visualize two different kinds of information broken down at the same geography in the greater Washington, DC, area. The map in figure 1 on the left shows the median income for mortgage borrowers at the census tract (i.e., neighborhood) level in 2018. The map in figure 2 on the right is a demographic population map of the same region that shows the percentage of residents living in each tract from 2014 to 2018 who identified as non-Hispanic Black.

FIGURE 1

Median Mortgage Borrower Income, 2018

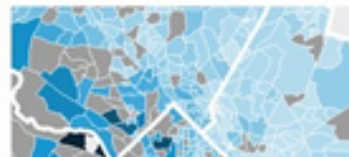


FIGURE 2

Percentage of Residents Who Identify as Non-Hispanic Black, 2014–18



# Aligning Your Work to the Framework

## Upward Mobility Program Assessment

Alignment to the three-part definition

Program evidence base and continuous learning

Community and practitioner engagement

Scale of impact

Targeting inequities

Removing barriers

Mitigating unintended consequences



# Speaker Presentations



# RVA RISING

GROW.  
THRIVE.  
HERE.

## A journey of progress for Greater Richmond.

Making our home a place where everyone can thrive.



# Our Journey to Date

**2020**

Regional leaders recognize heightened disparities and align on need for intentional, collective action to close opportunity gaps

**2023**

RVA joins Urban Institute learning cohort and adopts their economic mobility framework

**2025**

Alliance partners commit to 10-year partnership

**2021-22**

Economist Raj Chetty visits RVA, followed by RVA delegation to Charlotte; Close study of models, drivers and solutions for economic mobility

**2024**

RVA Rising brand and website established; Movement is introduced to more than 1,000 individuals/groups

**2026**

Alliance partners launching the Regional Capabilities to empower the Strategic Driver work

## Declaration of Cooperation

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### **Purpose of Cooperation: A Regional Vision and Common Agenda**

RVA Rising is a growing collaboration of business, community, and government organizations across RVA coming together to align and contribute resources toward cultivating more equitable economic opportunities for all residents of the region.

Led by ChamberRVA, the Community Foundation for a greater Richmond, Richmond Memorial Health Foundation, the Richmond Regional Planning District Commission (PlanRVA), and the United Way of Greater Richmond & Petersburg, this Regional Partner Alliance is committed to contributing human and financial resources to align key initiatives identified as critical to ensuring sustainable economic opportunity.

This Declaration is intended to memorialize the commitment of the Regional Partner Alliance's inaugural members, demonstrate the organizations' commitment to a long-term collaboration, and establish a framework for additional partners to join the effort.

# **RVA Rising: A Movement in Motion**

## **Our Goal**

Remove barriers so success is determined by potential, not zip code, race, or economic status.

## **Engagement Across the Region**

Nonprofits, business, local government, and community members in 9 localities

## **Regional Alliance Partners**

Plan RVA

Community Foundation

ChamberRVA

Richmond Memorial Health Foundation

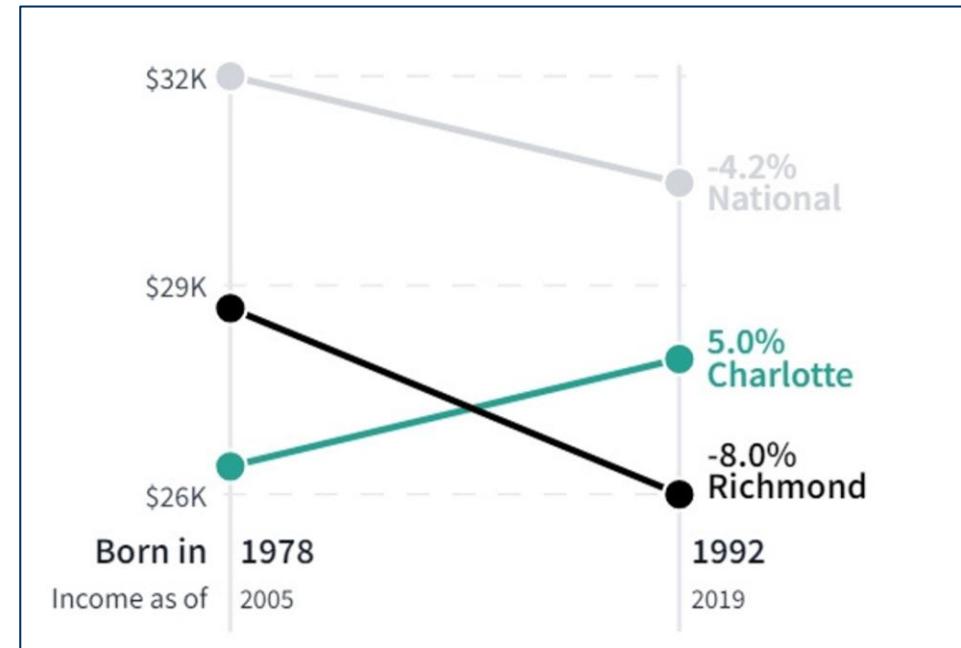
United Way

# The Wake-Up Call

## *From Data to Action*

- Richmond ranks **49th out of 50** in absolute economic mobility.
- For young adults from low-income families born in 1992, are earning an average income of **\$26,368 at age 27** – **8% less** than previous generation.
- **4 in 10 households** struggle to afford basic needs.

44	Philadelphia, PA	\$31.2K	\$27.2K	-12.7%	>
45	Baltimore, MD	\$29.8K	\$27.2K	-8.7%	>
46	Detroit, MI	\$27.8K	\$27.2K	-2.4%	>
47	Tampa, FL	\$29.8K	\$27.1K	-9.1%	>
48	Jacksonville, FL	\$28.6K	\$26.7K	-6.6%	>
49	Richmond, VA	\$28.7K	\$26.4K	-8.0%	>
50	Atlanta, GA	\$27.7K	\$26.2K	-5.2%	>



# We have a deeper understanding of *who* is getting left behind:

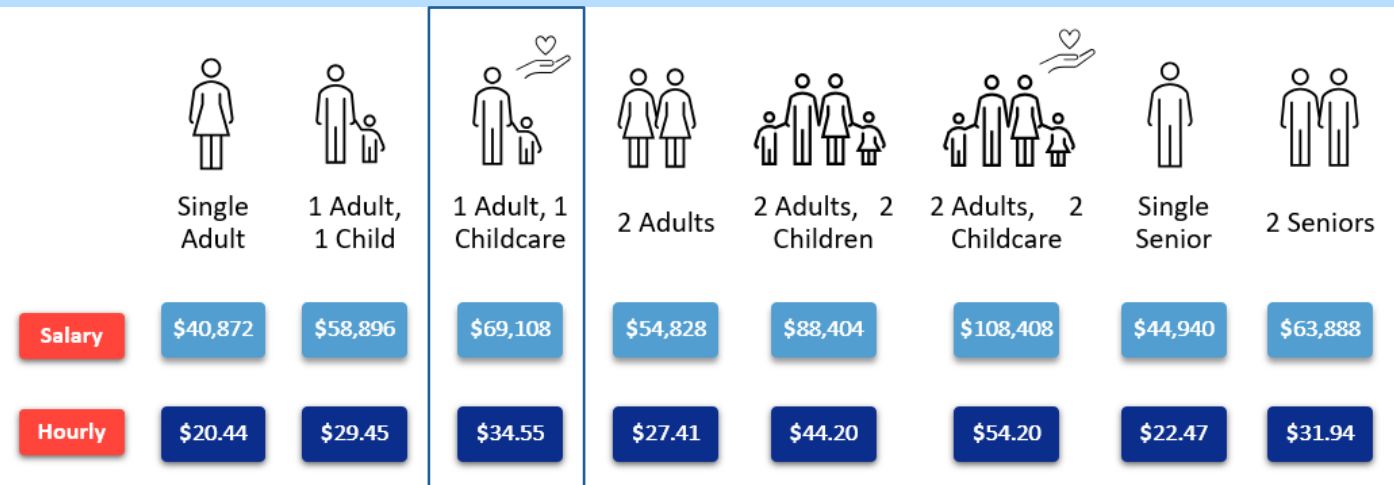
**ALICE** stands for **Asset Limited, Income Constrained, Employed** and describes households that are earning above the federal poverty level but still can't afford essential living costs.

- 4 in 10 households fall beneath the ALICE threshold of a survival household budget
- Not just a city phenomenon – surrounding counties show elevated ALICE rates

## ALICE income tool

1 Adult, 1 Preschooler in Richmond

Housing - Rent	\$1,226
Housing - Utilities	\$258
Child Care	\$1,104
Food	\$724
Transportation	\$531
Health Care	\$455
Technology	\$86
Miscellaneous	\$438
Tax Payments	\$1,154
Tax Credits	(\$217)
Monthly Total	\$5,759
ANNUAL TOTAL	\$69,108
<b>Hourly Survival Wage</b>	<b>\$34.55</b>



# Shared understanding of what **drives change**



Dimensions of Economic Mobility

Opportunity  
Rich &  
Inclusive  
Neighborhoods

Rewarding  
Work

High-Quality  
Education

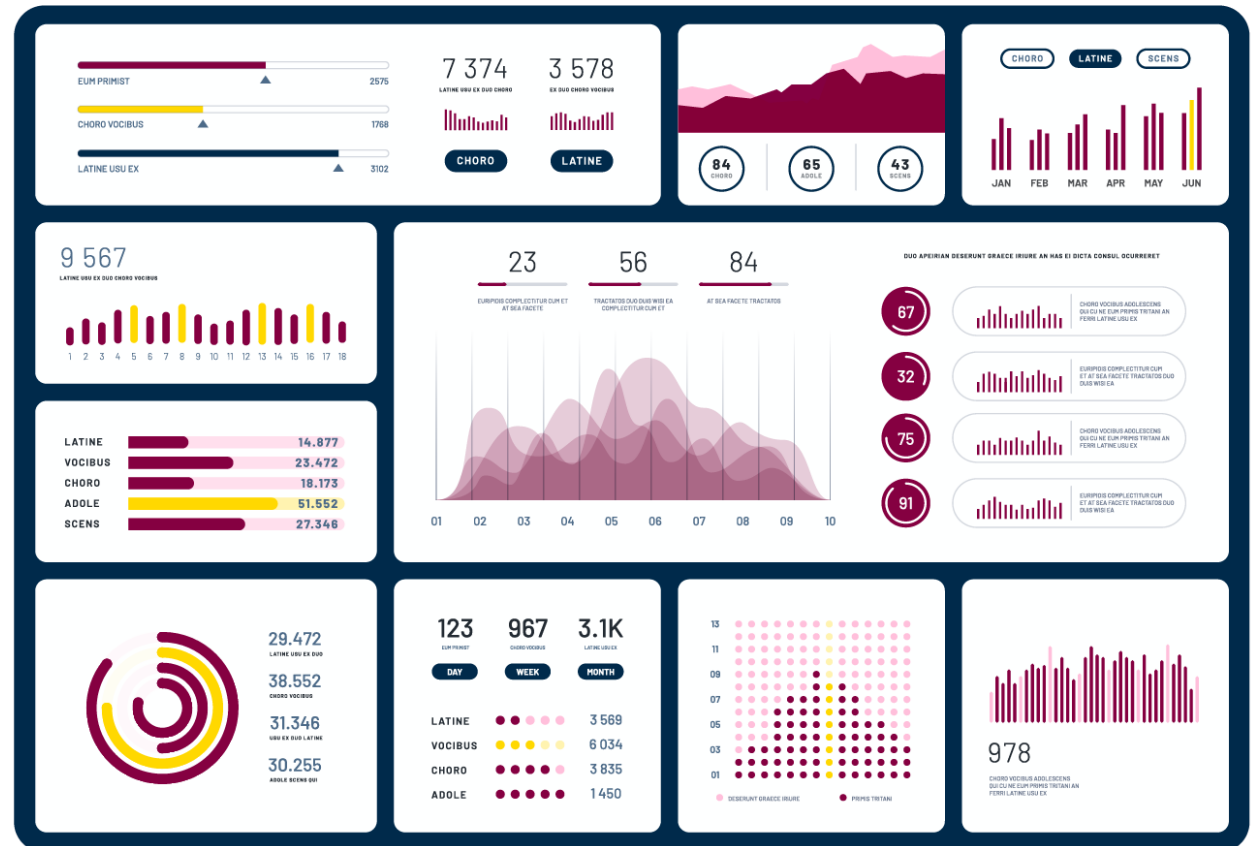
Healthy  
Environment &  
Access to Good  
Health Care

Responsive &  
Just  
Governance

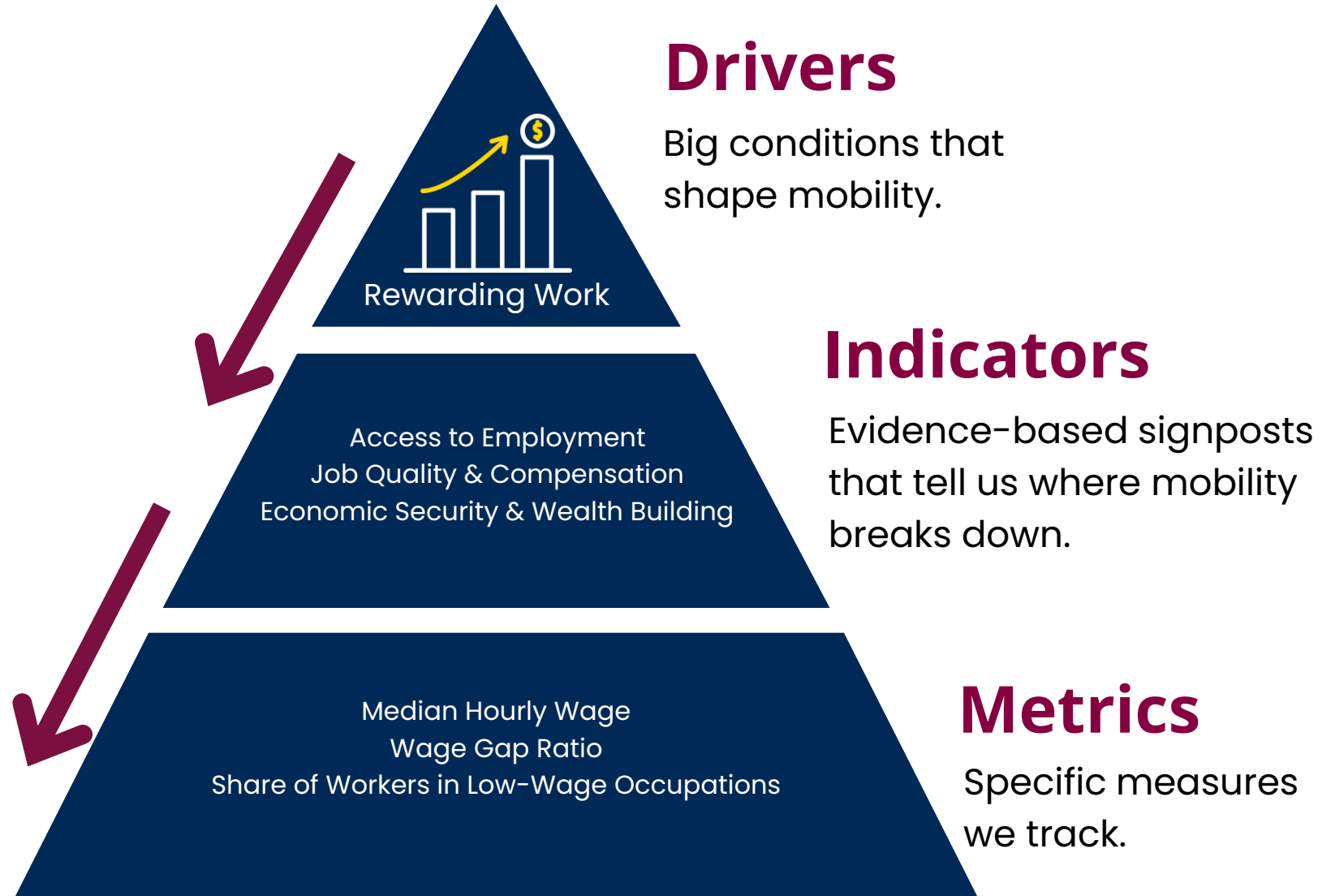
Drivers of Economic Mobility

# The RVA Rising Data Compass: Enabling alignment through shared measurement

- A tool for **tackling economic mobility, and...**
- **pointing the way toward progress**



# Understanding Our Framework





# The Compass is designed to advance Economic Mobility in 2 primary ways:

Helping **nonprofits** articulate their impact

and

Helping **funders** target their investments

# Initiatives Underway



## Next Gen Construction Partnership

Convened by ChamberRVA



## Catalyzing Communities for Youth & Families

Convened by United Way



## Health Equity Report

Convened by Richmond Memorial Health Foundation & Institute for Public Health Innovation

# We make **connections** and offer **resources**

*With the goal of creating greater efficiency, alignment, and scaled impact*



**Shared Data & Metrics:**  
aggregating data to align  
progress and guide  
decision-making.



**Narrative & Storytelling:**  
lifting up voices, progress,  
and why economic mobility  
matters.



**Convening & Civic  
Engagement:**  
creating capacity for  
learning, connection, and  
collective action.



**Strategy & Policy:**  
aligning partners,  
surfacing gaps, and  
building shared direction.

**Keep the momentum going.  
It's how we build our future, together.**

How do you connect to the work? Visit [www.rvarising.org](http://www.rvarising.org) to stay updated.

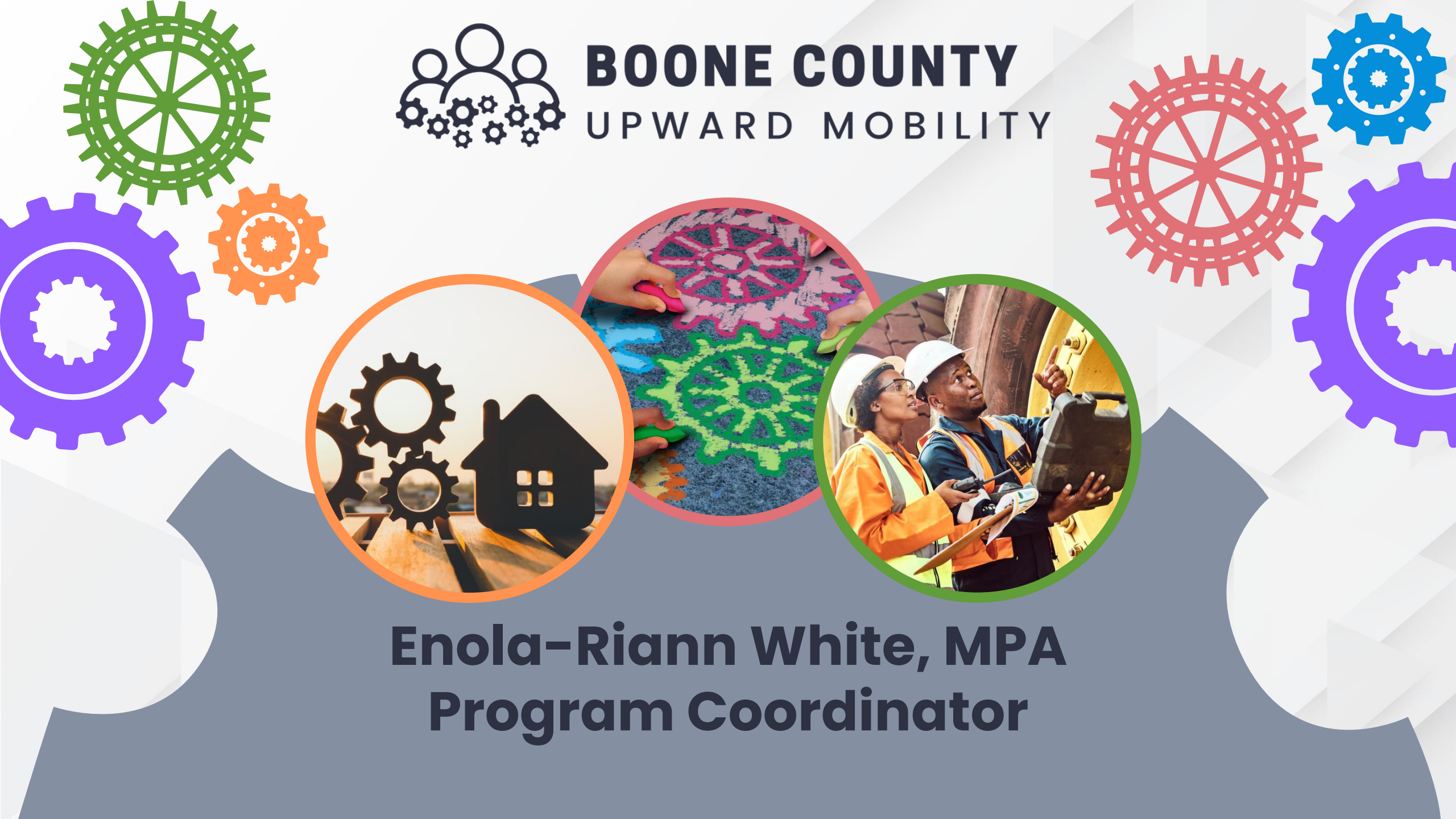
**Frank Cardella**  
Economic Mobility Director  
United Way Greater Richmond and Petersburg  
[cardellaf@yourunitedway.org](mailto:cardellaf@yourunitedway.org)  
(804) 771-5831





# **BOONE COUNTY**

## UPWARD MOBILITY



**Enola-Riann White, MPA**  
**Program Coordinator**



# TIMELINE

Urban Institute Grant  
May 2021

Mobility Action Plan Released  
June 2022

Poverty Simulation  
September 2024

First Joint Meeting  
December 2024



First Workgroup Meeting  
November 2021

Program Manager Position Created  
February 2023

Housing Study Released  
October 2024

Raising Readers Launches  
May 2026





# MOBILITY ACTION PLAN



## Fair & Inclusive Housing

- Affordable Housing Coalition
- Housing Access and Support Alliance



## Early Grade Literacy

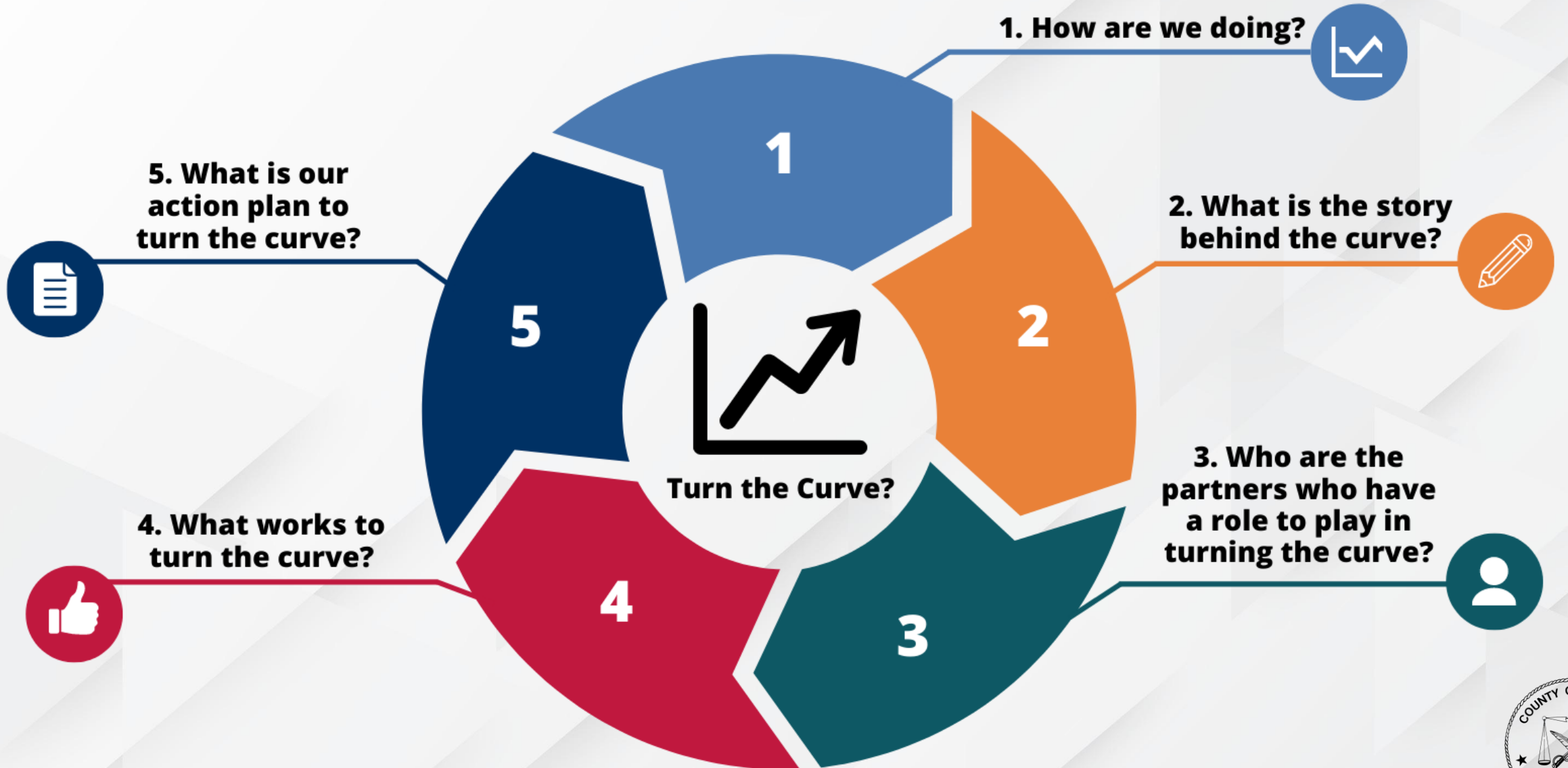


## Jobs & Workforce Development





# RESULTS-BASED ACCOUNTABILITY



# BOONE COUNTY'S UPWARD MOBILITY ACTION PLAN

2025 COMMUNITY UPDATE



# LESSONS LEARNED

1. Clear Messaging
2. Shared Ownership
3. Collaboration  
Takes Time
4. Have A Dedicated  
Coordinator
5. Be Willing To Pivot



# How to Keep the Momentum Going





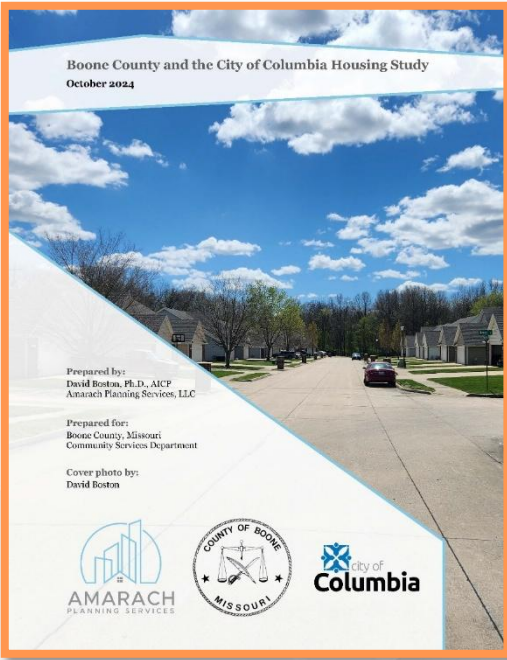
# MOVING FORWARD

1. Data Tracking
2. Regular Meetings
3. Community Engagement
4. Continuous Refinement





# WORK IN PROGRESS



**Joint City County Housing Study**  
AHC

**Turn the curve thinking – workplace readiness**  
JWD



**Ready to Move In?**  
Information to use as you prepare to sign a lease and move into rental housing

**Five things to know:**

- Know the order to take with any steps needed**
  - Work with your housing provider to learn and follow the specific processes and requirements for your situation.
  - Always read and fully understand your lease.
- Pay your security deposit**
  - Understand your housing provider's expectations and follow their directions, especially with deadlines.
- Provide all information requested**
  - Follow the expectations outlined in your rental agreement to provide any additional information to your housing provider. This might include documentation for a pet deposit or proof of renter's insurance.
- Set up Utilities**
  - Understand who is responsible for all utility services (water, gas, electricity, trash) and make sure they are set up.
  - If you are responsible for paying utilities, contact each company.
- Coordinate access for move in day**
  - Make a plan for how to get your keys or access code.
  - Follow any instructions for the time and date you can move into your new rental housing unit.

**Know who to contact**

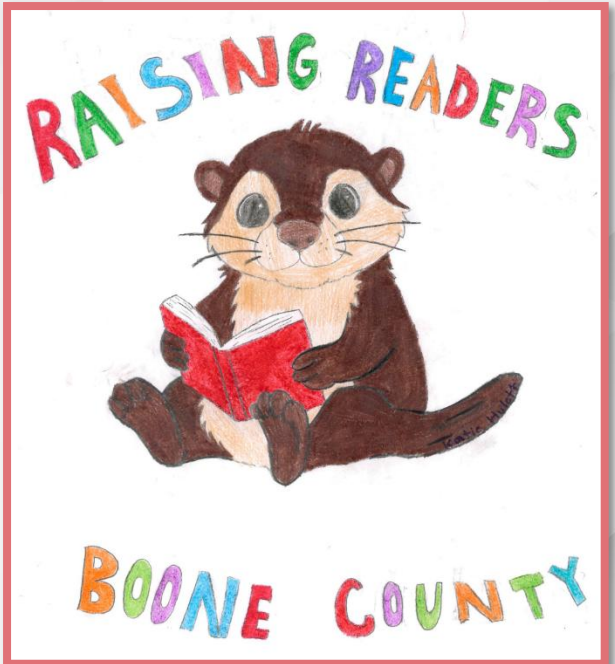
- Communicate with your housing provider using the process they request.
- Tell your housing provider if your phone number or email address changes.

This document was compiled as part of Boone County Upward Mobility collaborative efforts undertaken by the Housing Access and Support Alliance workgroup in 2025. While every effort was made to provide current and relevant information, please additionally seek your own guidance on this topic, as the accuracy of the information cannot be guaranteed.

Released on April 25, 2025 | [upward@boonecountymissouri.org](mailto:upward@boonecountymissouri.org) | **BOONE COUNTY UPWARD MOBILITY**

**Rental navigation tools**  
HASA

**County-wide literacy campaign**  
EGL





# BOONE COUNTY

## UPWARD MOBILITY



# Questions?





# BOONE COUNTY

## UPWARD MOBILITY



[upward@boonemo.gov](mailto:upward@boonemo.gov)

<https://www.boonemo.gov/community-services/upward-mobility/>

# WELCOME

## Pathways to Shared Prosperity

Creating a Unified Approach to Upward Economic Mobility in San Mateo County

Shireen Malekafzali Taidi

Chief Equity Officer and Director of Economic Mobility & Labor Standards

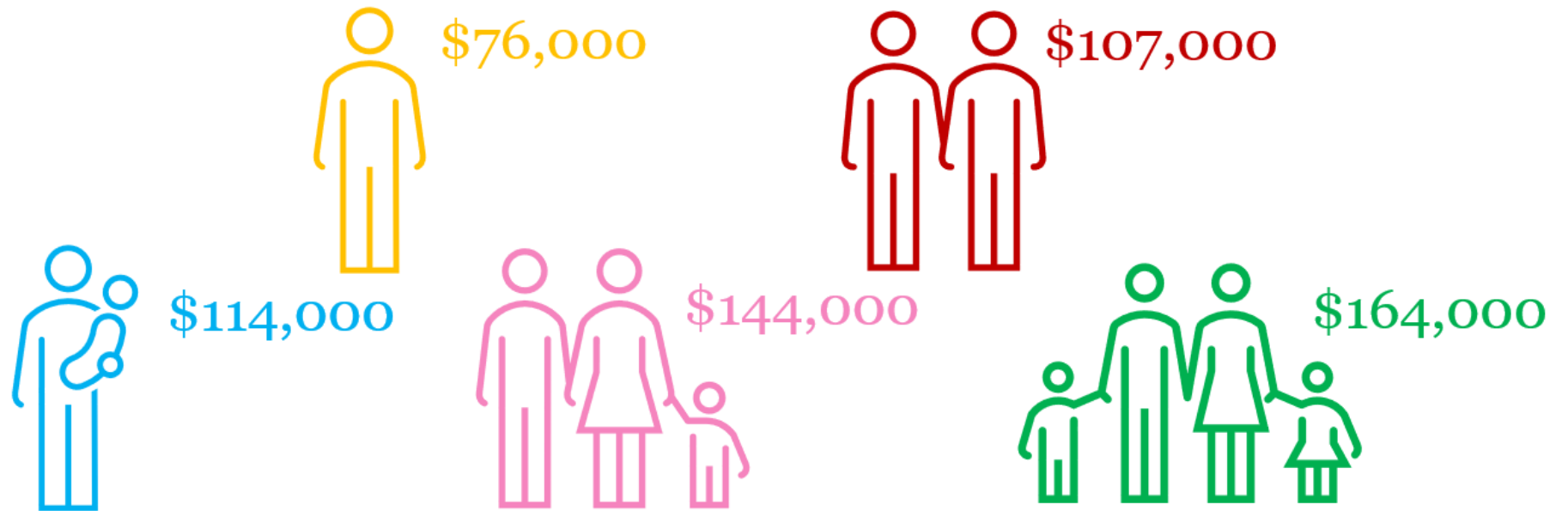
April 23, 2026



**COUNTY OF  
SAN MATEO**

# Context: San Mateo County

Shared Prosperity Challenge: Hourglass Economy



Households with 'low-mid income' at 300% of California Poverty Measure – adjusted for San Mateo County

# Shared Prosperity Coordinating Council

Increasing economic mobility through opportunity

## Economic Mobility

*Increasing Economic Opportunity & Outcomes for All*



### Stability Outcomes

Ability to Meet Basic Needs



### Mobility Outcomes

Self-Sufficiency and Pathways to Prosperity



# Representation Matters

Before we started—who is in the conversation?

<b>Diversity and Lived Experience</b> Members who understand and share their own community's concerns	<b>Organizations</b> Diverse institutions working with and for our most impacted communities
<ul style="list-style-type: none"><li>• Adults, aging adults, and organizations that support children and youth</li><li>• Asian, Black, Latino/e/x, Pacific Islander, White</li><li>• LGBTQ+</li><li>• Lived experience or a loved one experiencing mental or physical disability, immigration, economic insecurity, housing insecurity, incarceration, or having sought or utilized safety net services</li><li>• Residents in Coastside, North County, South County, and Mid-County</li></ul>	<ul style="list-style-type: none"><li>• Academia and research institutions</li><li>• Children and youth support organizations</li><li>• Community development financial institutions</li><li>• Community service organizations</li><li>• Economic development agencies</li><li>• Educational institutions and schools</li><li>• Local government and elected officials</li><li>• Philanthropy</li><li>• Small business and entrepreneur service providers</li><li>• Workforce development organizations</li></ul>

# Shared Prosperity Coordinating Council

Leaders from across the county



# Our Approach

## Key Principles



### **Diverse Representation**

Planning teams with lived experience and local expertise



### **Data-driven Decisions**

Using data to inform decision-making



### **Equity-focused Approach**

Using equity-focused processes to prioritize populations



### **Engagement of Impacted Communities**

Engaging community members in meaningful ways



### **Landscape Analysis**

Collaboration with partners and initiatives to maximize impact

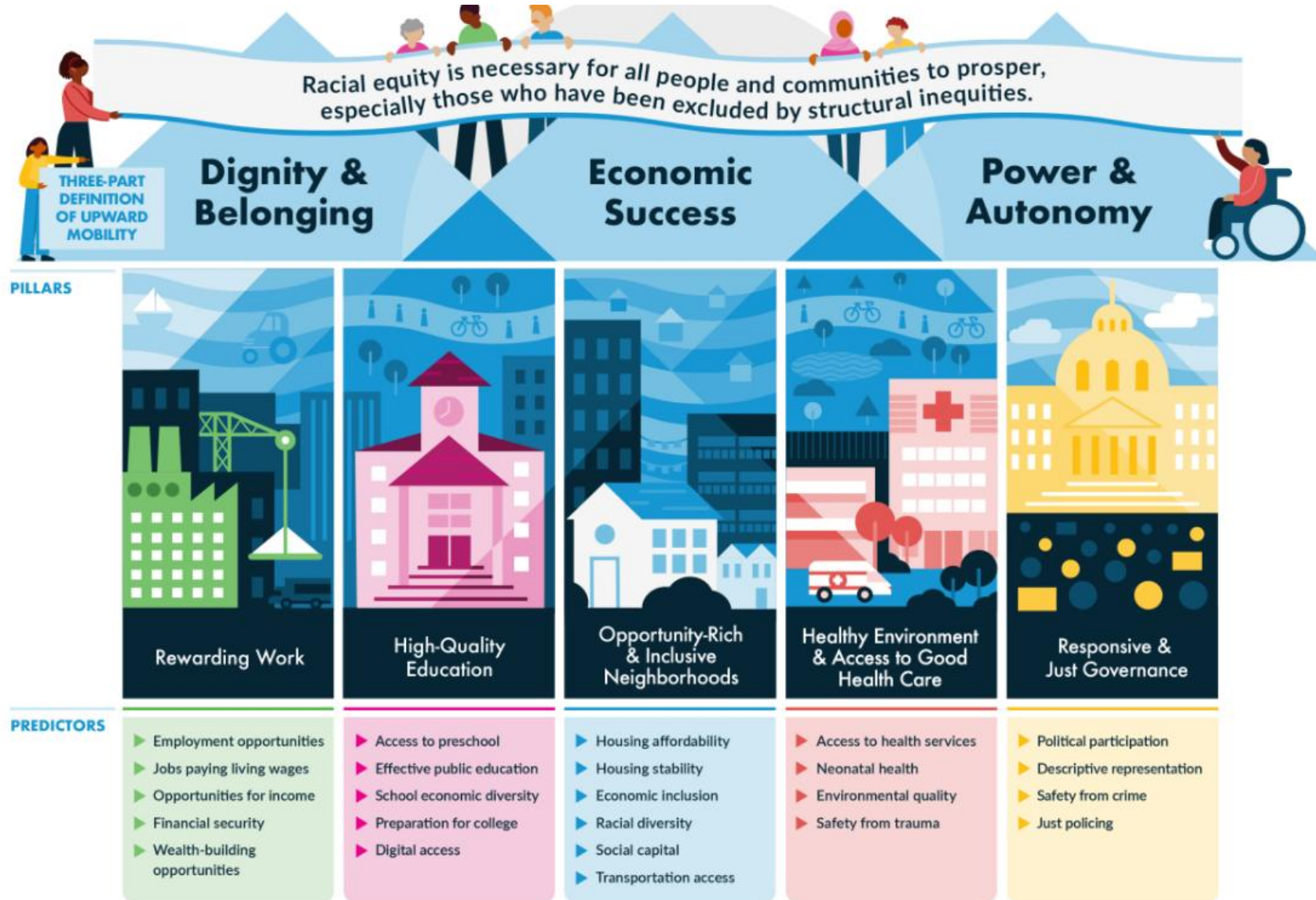


### **Accountability**




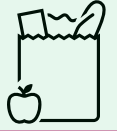
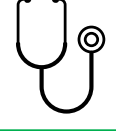
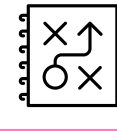

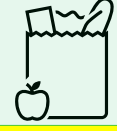


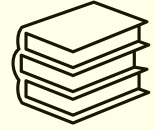



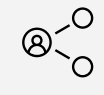
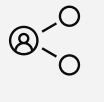

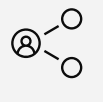
Promoting transparency, validating impact, tracking progress, learning and adjusting

**Planning for Equity: Key Principles**

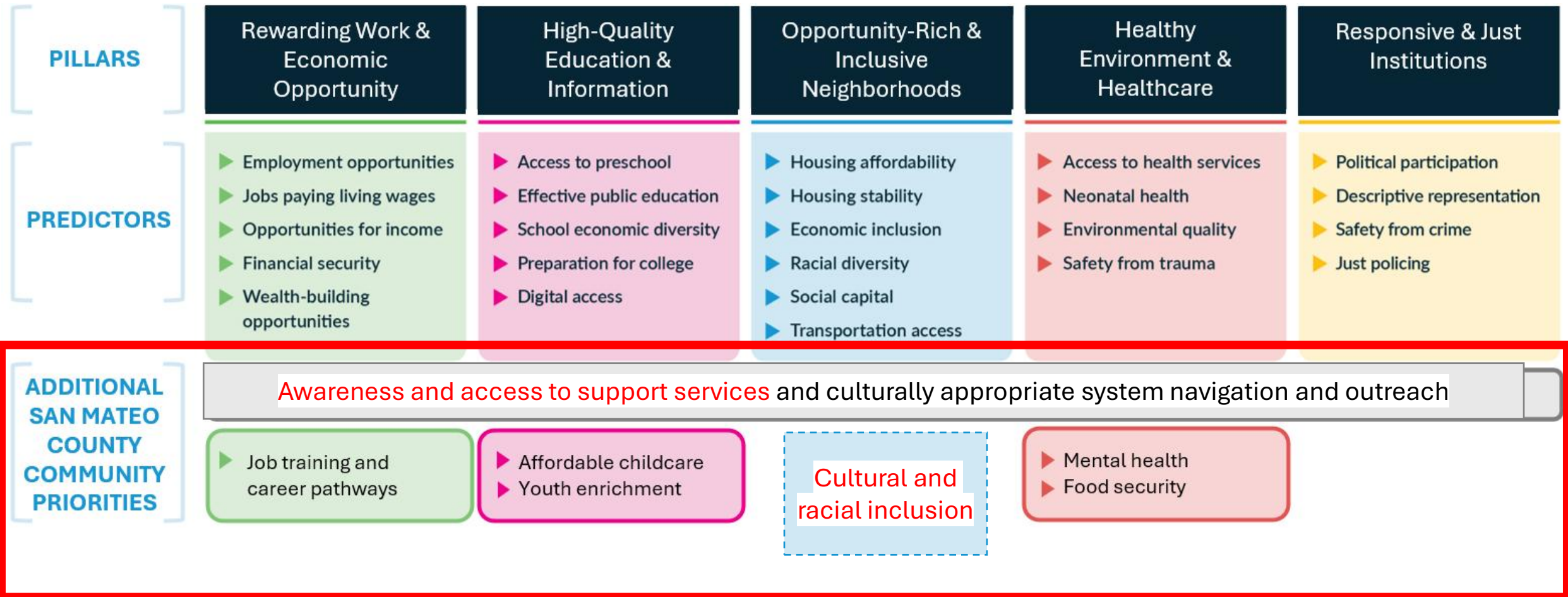
# Urban Institute Upward Mobility Framework



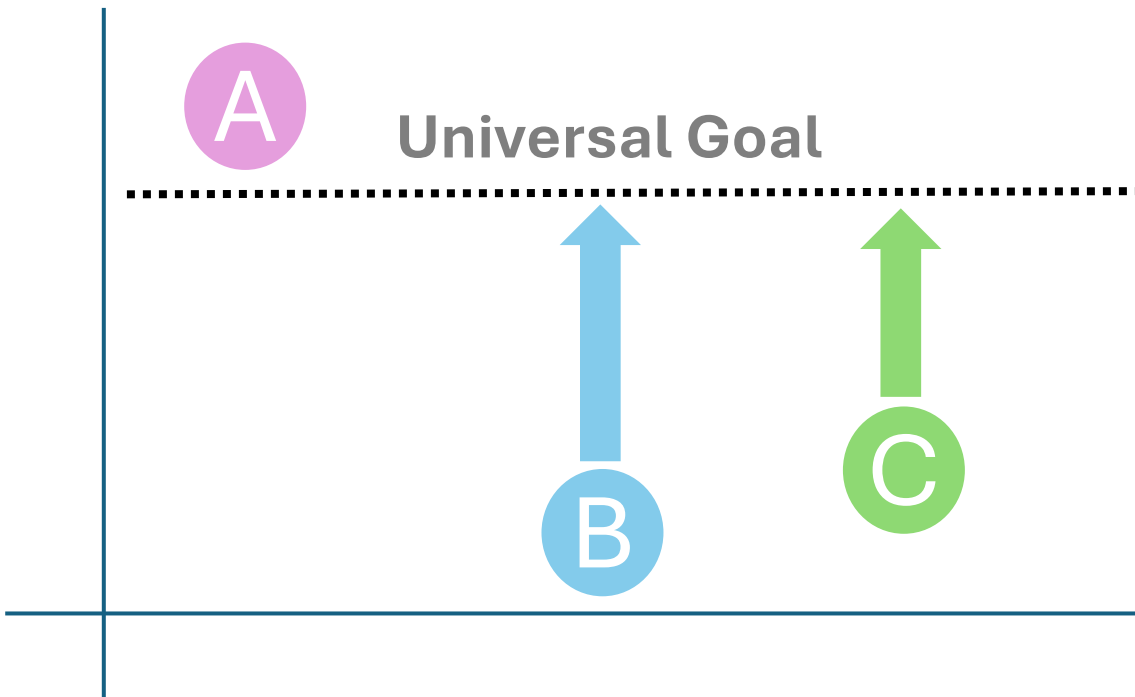
# Community Identified Priorities: Recent Countywide Rankings

Pandemic Recovery Community Priorities	Immigrant Survey "Most Useful" Services	Measure K Community Priorities
 <p>Housing &amp; Shelter</p>	 <p>Affordable Housing</p>	 <p>Housing &amp; Homelessness</p>
 <p>Food &amp; Nutrition</p>	 <p>Healthcare Coverage</p>	 <p>Emergency Preparedness</p>
 <p>Childcare (ages 0-5) / Out-of-School Care (ages 5+)</p>	 <p>Food Assistance</p>	 <p>Children &amp; Families</p>
 <p>Job Training &amp; Assistance</p>	 <p>Educational Assistance</p>	 <p>Mental Health</p>
 <p>Mental Health &amp; Wellness</p>	 <p>Legal Assistance</p>	 <p>Culturally Sound Engagement, Tailored Program Design, and Experienced Administration</p>
 <p>Culturally Responsive Navigation Support</p>	 <p>Mental Healthcare</p>	
	 <p>Equitable and Accessible Services</p>	

# Localizing the UI Upward Mobility Framework

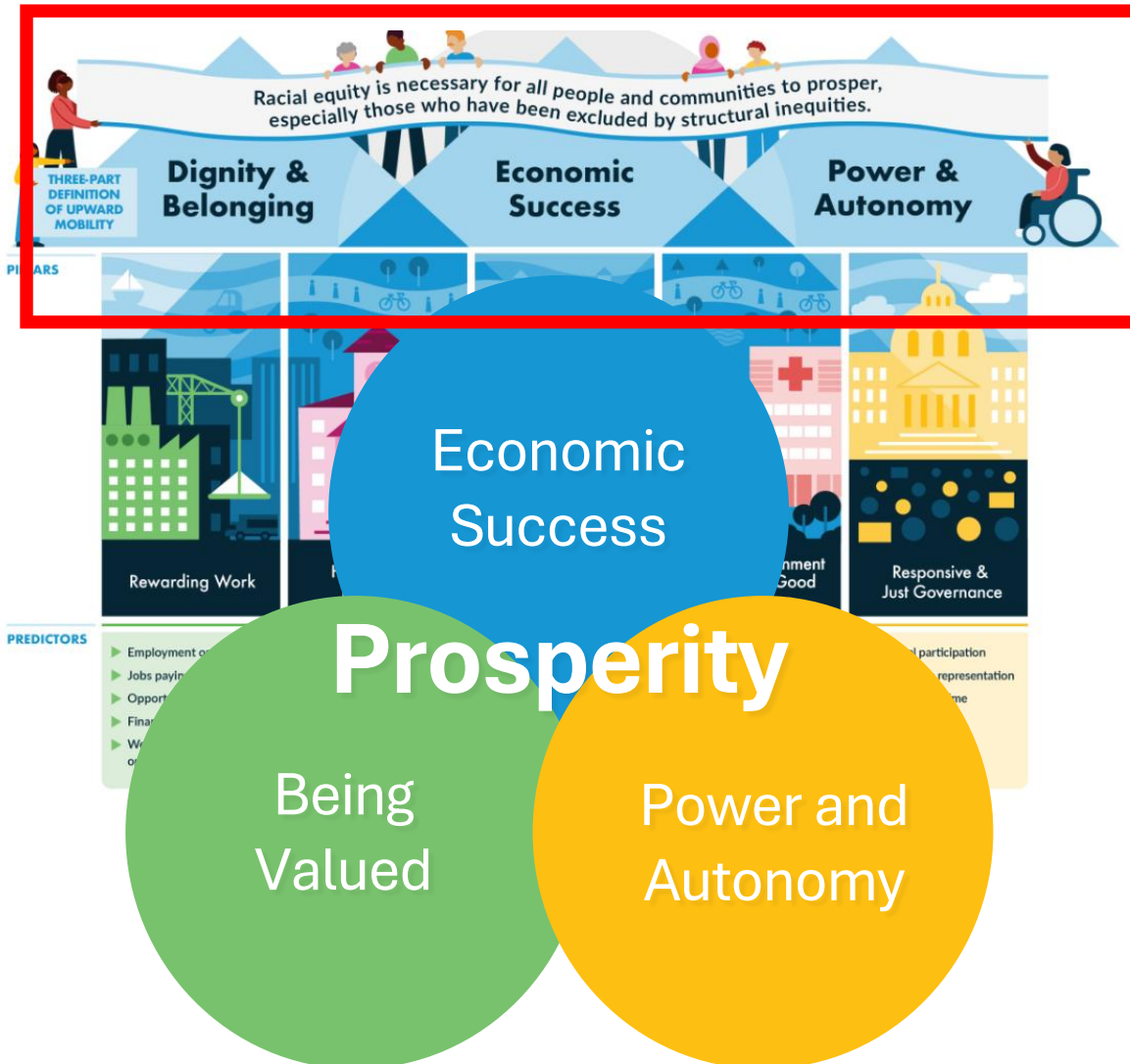


# Targeted Universalism: approach to analyzing mobility metrics to identify priority strategies



1. Set a **universal goal**
2. Disaggregate data to identify **populations most challenged**
3. Identify the priority population's **specific issues and barriers** to achieving the goal
4. Develop **targeted strategies** to address the key barriers for priority sub-populations

# Localized Universal Prosperity Goals



## Economic Success

All individuals and families have safe, stable, and affordable housing and reliable income that covers their expenses while building wealth throughout their lifetime and for future generations

## Being Valued

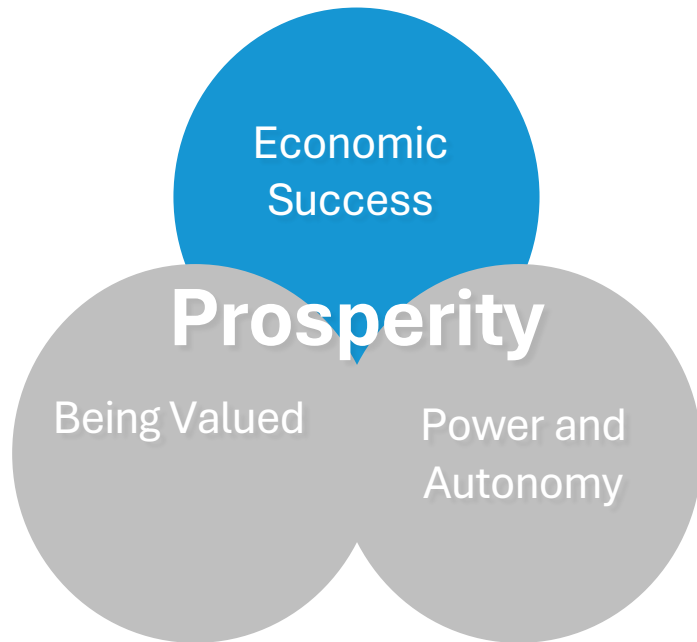
Everyone feels the respect, dignity, and wellbeing that comes from a sense of belonging and contributing to and being appreciated across all settings and demographics

## Power & Autonomy

All residents have access to opportunities to pursue their personal goals and voice and agency to influence larger policies and actions that affect their lives

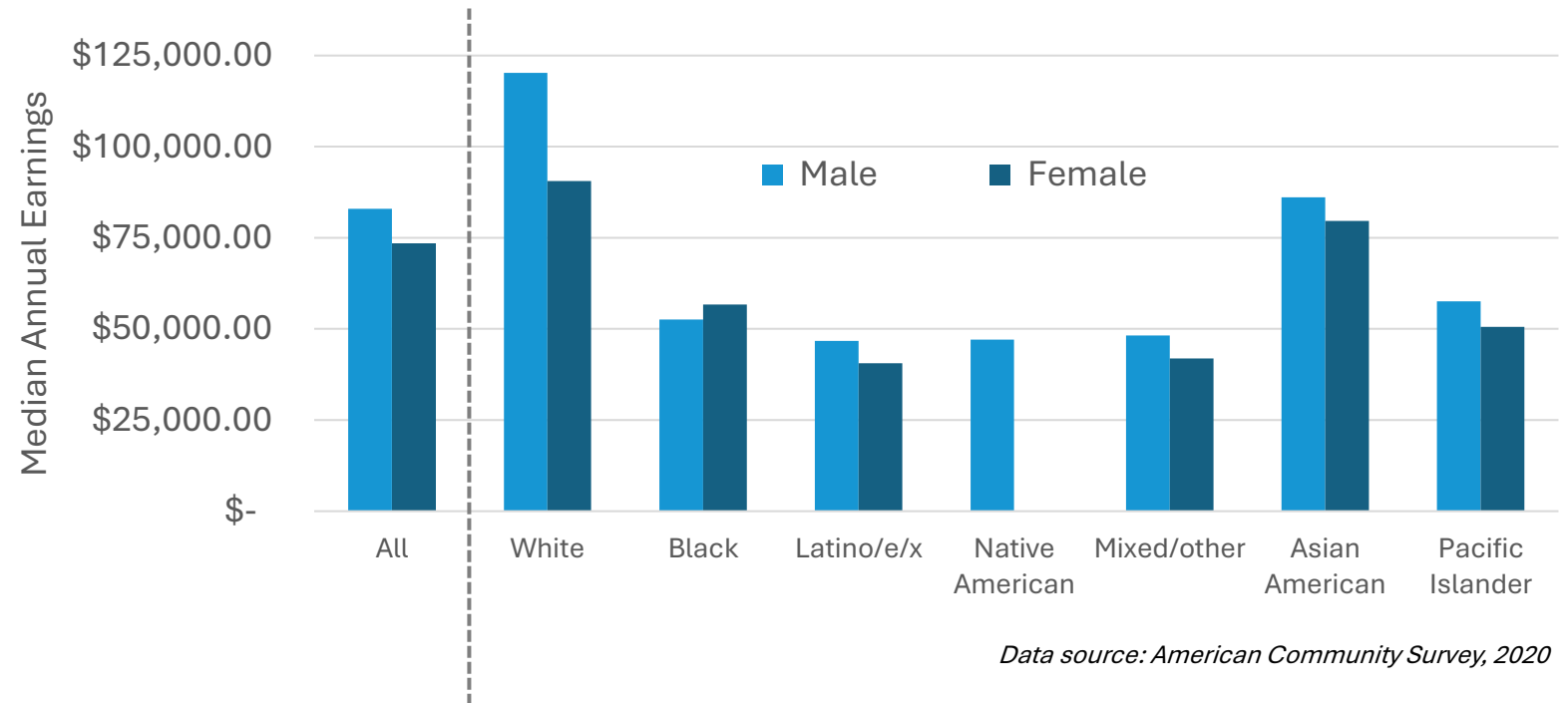
# Sample of Targeted Universalism in Action

**Economic Success** - All individuals and families have reliable income that covers their expenses while building wealth throughout their lifetime



## Key Metric: Median Annual Earnings

Annual income by race/ethnicity and gender



Data source: American Community Survey, 2020

# What Happened Next?

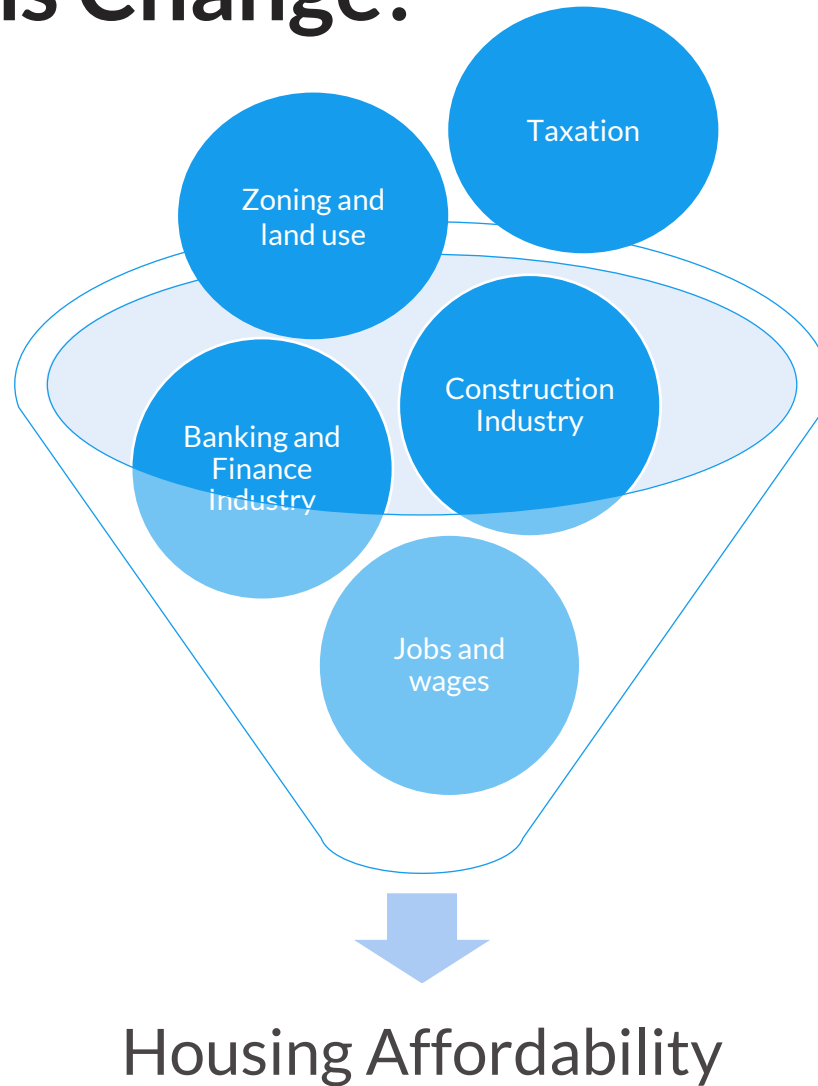
- **Developing Recommendations**
  - Reviewed existing efforts underway to address needs
  - Identified gaps and nascent efforts
  - Selected strategies to address the gaps in ways that are feasible and impactful
- **“Groundtruthing”**
  - 7 community conversations with impacted communities
  - Definitions, key data points, key needs and recommendations
- **Community Data Portal & Action plan**
- **Implementation Next Steps**
  - Developed Goals
  - Disseminate Action Plan & Community Data Portal
  - Implement Strategies
    - Narrative Strategy: Berkeley Media Studies Group
    - Develop Pilot for Local Public Workforce Pipeline
    - Identify additional pathways to implement goals

# Building & Sustaining Coalitions

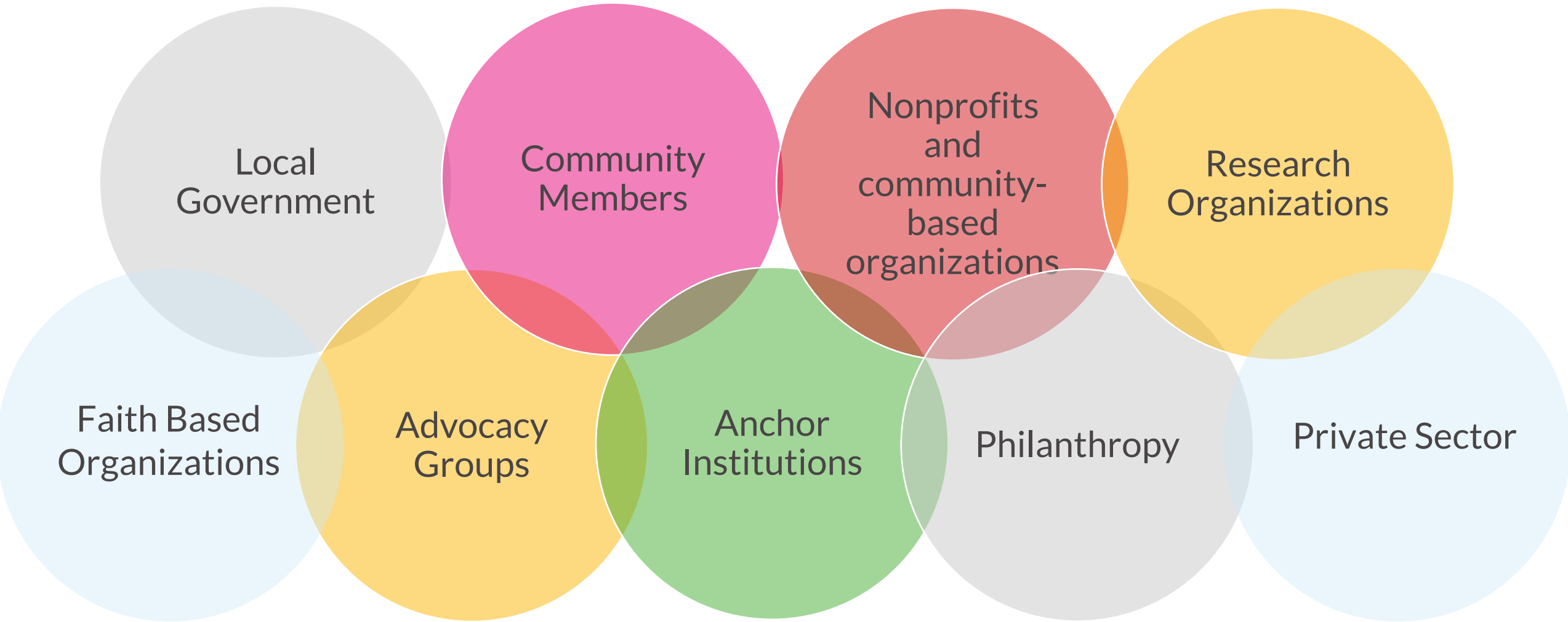


# Why are Coalitions Essential to Upward Mobility Work?

## The Answer: Systems Change!



# Actors that Advance Systems Change



# Key People to Include in Your Coalition

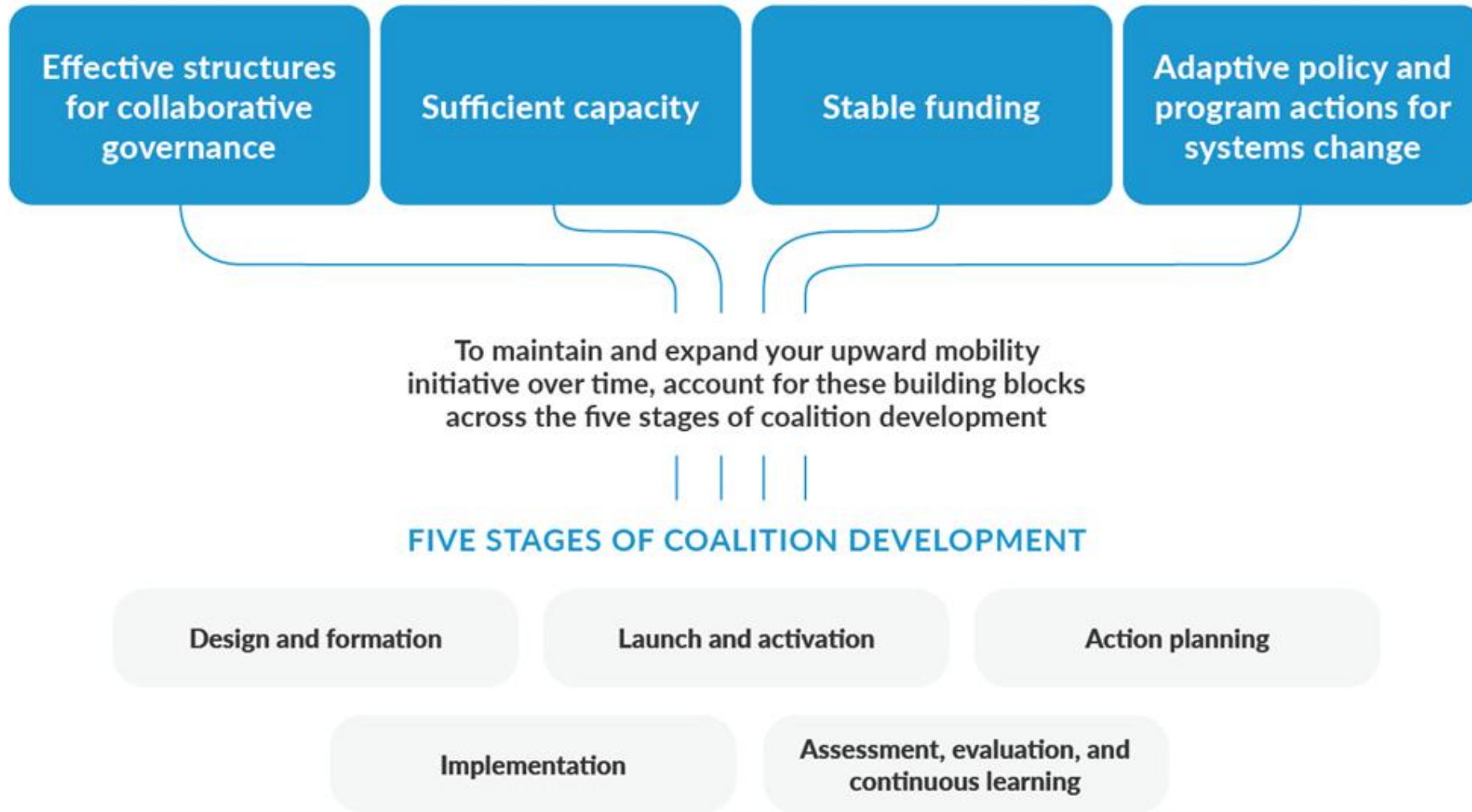
- Those most affected by the issue
  - Neighbors, recipients of services
- Those charged with carrying out key functions related to the issue
  - Government and community-based service providers
- Those who are directly or indirectly implicated by what the coalition might do/achieve
  - Landlords, local employers, etc.
- Champions from the community
  - Those who see a vision for change, can motivate others, or bring people to the table

## Helpful Practices for Strengthening Coalitions

- Adopt a continuous learning approach
- Involve everyone in generating goals, making major decisions, and cocreating your theory of change
- When convening working groups, prioritize cross-sector partnerships
- Adapt your coalition's membership based on evolving needs
- Document values and decisionmaking processes



# Sustaining Coalitions in the Long Term



# Upward Mobility Initiative Resources & Upcoming Events

**UMI Training Sprints** – apply starting Monday, April 27<sup>th</sup>!

- Identifying Effective Interventions
- Understanding Your Community's Upward Mobility Ecosystem
- Understanding Your Community's Upward Mobility Conditions
  
- Visit [upward-mobility.urban.org](https://upward-mobility.urban.org)
- Subscribe to our [newsletter](#)

**Contact us!** Email [upwardmobility@urban.org](mailto:upwardmobility@urban.org) to reach our team.



Thank you!

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