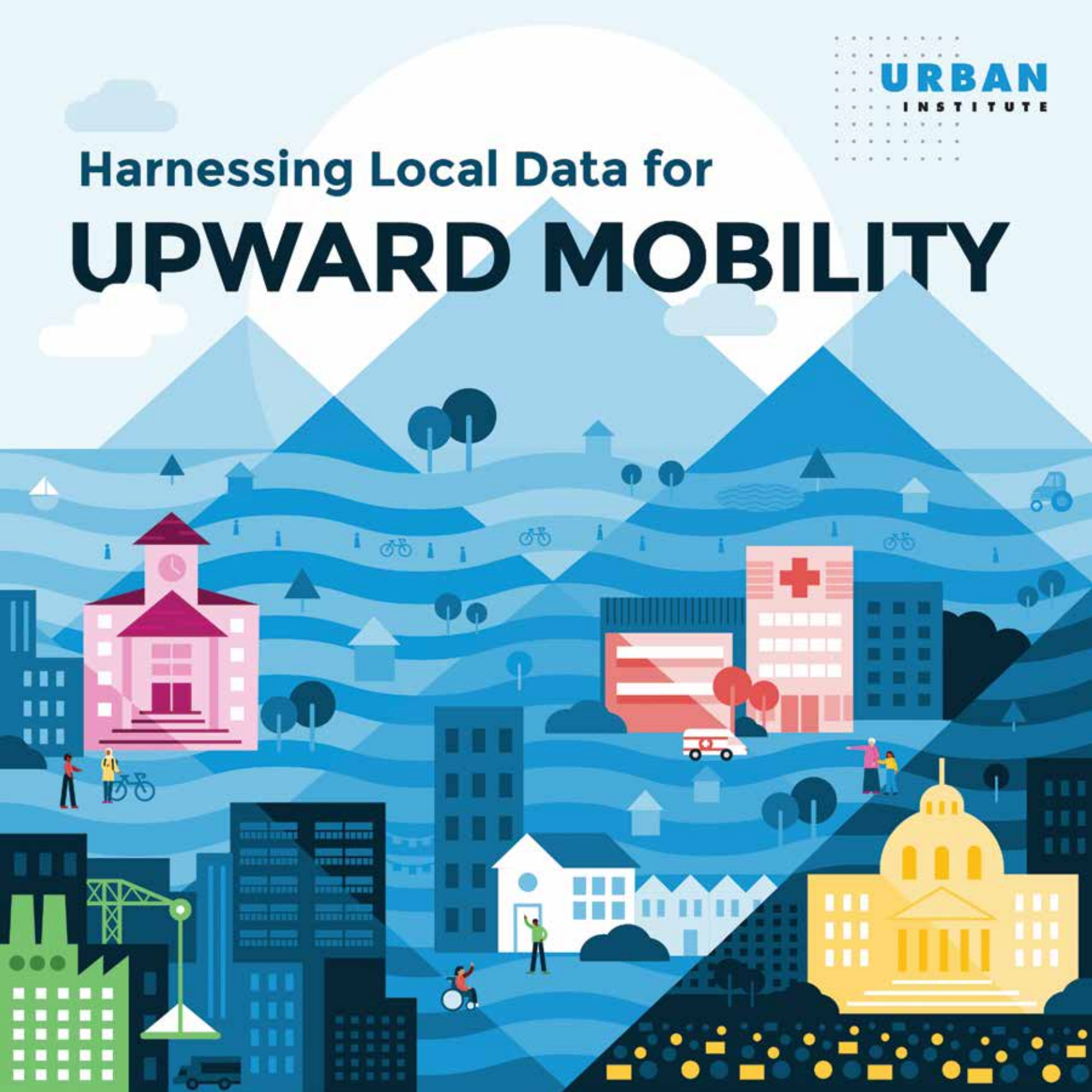
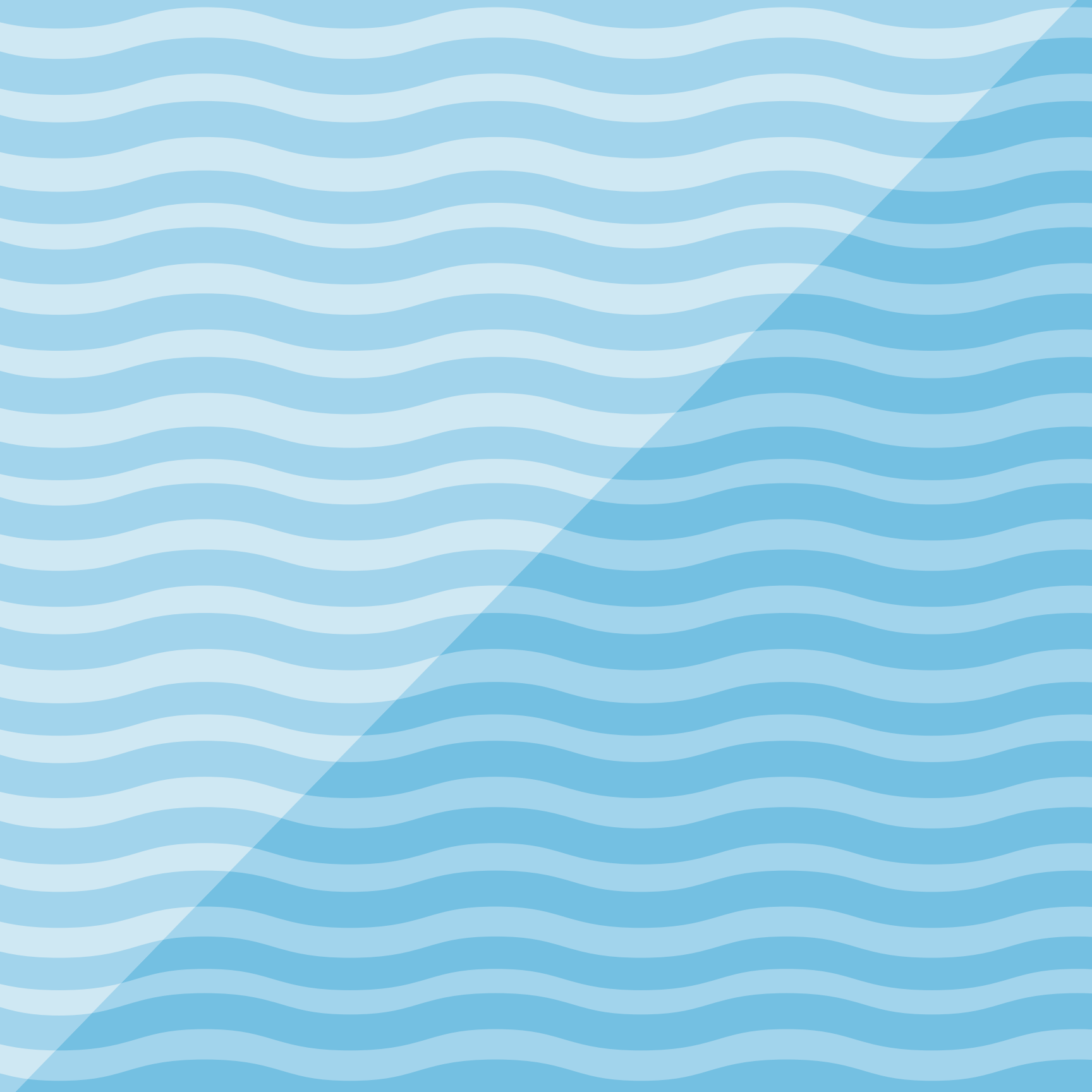


Harnessing Local Data for

UPWARD MOBILITY





AGENDA



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Welcome

Keith Fudge, Director of Upward Mobility Initiative, Urban Institute
Kosar Jahani, Senior Program Officer, Bill & Melinda Gates Foundation
Lee Evans, Policy Coordinator, Urban Institute

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Questions About Your Community the Data Dashboard Can Help You Answer

Samantha Fu, Senior Policy Associate, Urban Institute

3

Strengthening the Mobility Metrics with Local Data

Tina Chelidze, Policy Associate, Urban Institute

4

Using Data to Move Beyond Grantmaking and Toward Leadership, Collaboration, and Equity

Dr. Leonard Brock, Vice President of Learning and Impact (Issues), CFLeads

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The Status of Upward Mobility in the United States

Margery Austin Turner, Institute Fellow, Urban Institute

6

Transforming Communities through Evidence and Leadership

Myra Jones-Taylor, Senior Vice President, Impact and External Affairs, Urban Institute

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Q&A Panel

Moderated by Kimberly Burrowes, Training and Technical Assistance Senior Manager, Urban Institute

UPWARD MOBILITY FRAMEWORK

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

Racial equity is necessary for all people and communities to prosper, especially those who have been excluded by structural inequities.

THREE-PART DEFINITION OF UPWARD MOBILITY

Dignity & Belonging

Economic Success

Power & Autonomy

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

ABOUT THE UPWARD MOBILITY INITIATIVE

The Upward Mobility Initiative provides local leaders with data and tools to create the conditions that lead to economic success, power and autonomy, and dignity and belonging for all people, especially those who have been excluded from prosperity. The project is rooted in the Upward Mobility Framework, which provides local actors with tools for defining and measuring upward mobility. The framework includes a three-part definition of upward mobility, a focus on racial equity, five pillars of support people need for their communities to achieve mobility, and 24 predictors that measure the strength of these pillars in a community and can be influenced to help more people achieve social and economic mobility.

OUR HISTORY



2016 – 2018 | US Partnership on Mobility from Poverty

The Urban Institute convened a group of 24 leading voices in academia, practice, the faith community, philanthropy, and the private sector to ask what it would take to dramatically increase mobility from poverty in the United States. The group broadened the definition of mobility and developed strategies for improving mobility outcomes.



2019 – 2020 | Metrics to Inform Local Action Project: Developing the Framework

Urban formed a working group to develop a concise but comprehensive set of evidence-based metrics to track progress on mobility at the local level. The insights from the working group and from cross-sector stakeholder feedback sessions informed an initial framework for boosting mobility.



2021 – 2022 | Boosting Upward Mobility Project: Testing the Framework

The Urban Institute partnered with eight counties to form the Upward Mobility Cohort and beta-test how the Upward Mobility Framework and Mobility Metrics could be used to inform local decisionmaking. During this engagement, each community developed a cross-sector coalition to analyze the metrics data and assembled supplemental local data, conducted stakeholder and community engagement activities, and mapped existing policies and programs tied to mobility and equity to assess gaps and prioritize new strategies, resulting in a local Mobility Action Plan.

Drawing from this technical assistance engagement with the Upward Mobility Cohort, Urban published *The Planning Guide for Local Action* to support the capacity of cities and counties across the country to apply the Framework and Mobility Metrics data.



2023 – Present | Upward Mobility Framework Project: Expanding Access

Our current work centers on developing new data tools and technical assistance approaches to help more communities and organizations apply the Upward Mobility Framework to enhance their upward mobility and racial equity efforts.



Leonard Brock

Vice President of Learning and Impact (Issues), CFLeads

Leonard Brock joined the CFLeads team in May 2020. As VP, Learning and Impact (Issues), Brock leads CFLeads' Economic Mobility Action Network by facilitating shared learning and understanding, identifying content expertise to help deepen the knowledge of participants, and creating a safe space for community foundations to learn from each other as they work to advance economic mobility in their communities.

Leonard Brock believes closing the racial wealth gap is the civil rights and social justice fight of the 21st century. He brings a wealth of knowledge to this space, with a background working on policy issues related to economic mobility, economic resilience and poverty reduction. He most recently served as the Executive Director of the Rochester-Monroe Anti-Poverty Initiative for the last five years. Prior to joining RMAPI, Brock worked for a decade in youth services, working with vulnerable populations in the city of Rochester. He holds a Doctorate of Education in Executive Leadership from St. John Fisher College, and earned a Bachelor of Science degree in communications and a Master of Public Administration from the State University of New York College at Brockport.

Brock also has extensive teaching experience and is a nationally recognized scholar-practitioner working to advance education reform, black male achievement and poverty reduction across the country. In addition to his academic and professional expertise, Brock brings a lived experience to the Economic Mobility Action Network, having grown up in one of the most impoverished areas of the U.S.



Kimberly Burrowes

Training and Technical Assistance Senior Manager, Urban Institute

Kimberly Burrowes is a training and technical assistance senior manager in the Research to Action Lab at the Urban Institute. Burrowes's research has focused on advancing racial equity in parks and public spaces, practices and policies for affordable housing solutions, and participatory engagement.

Burrowes thinks about how to provide an equity framing to local policy solutions for the built environment, using placemaking and community engagement tools. Within her technical assistance role, Burrowes works with local government agencies and nonprofits to build their capacity to tackle policy challenges. She has advised local agencies on the equity impacts of placemaking, community-based nonprofits focused on housing stability and equity, county-level criminal justice system agencies, and most recently, resident engagement approaches for municipalities exploring financial empowerment plans.

Before joining Urban, Burrowes worked with the urban development and disaster risk management unit at the World Bank, focusing on projects in the Caribbean and East Asia. Before that, she worked on affordable housing policy at the Massachusetts Housing Partnership in Boston and the Island Housing Trust on Martha's Vineyard.

Burrowes has a BA in geography and international development and an MA in community development and urban planning from Clark University.



Tina Chelidze

Policy Associate,
Urban Institute

Tina Chelidze is a policy associate in the Research to Action Lab, where she works with local governments to promote economic mobility. She helps inform policy change at the local, state, and organizational levels by translating research into actionable insights. Before joining Urban, Chelidze worked at Opportunity Insights, a nonprofit organization at Harvard University that translates economic research to identify barriers to economic opportunity and develop scalable solutions that empower economic mobility.

She previously worked at Research Improving People's Lives (formerly known as the Rhode Island Innovative Policy Lab) as a policy analyst for the Rhode Island Department of Education. Chelidze received her BA in economic theory and mathematics with a minor in creative writing from New York University, and she holds a Master of Public Affairs degree from Brown University, where she specialized in data-driven policy.



Lee D. Evans

Policy Coordinator,
Urban Institute

Lee D. Evans is a policy coordinator in the Research to Action Lab at the Urban Institute, where he provides administrative and technical assistance for several cross-sector projects.

Before joining Urban, Lee worked as an analyst for Mindset Global, an education start-up, and interned at the Children's Defense Fund in the child poverty department. He is passionate about equipping legislators with the tools they need to implement robust and effective programs, particularly programs that lift people out of poverty and ensure children are able to live happy, healthy, and safe lives.

Lee attended Duke University and holds a bachelor's degree in public policy with a certificate in innovation and entrepreneurship.





Samantha Fu

Senior Policy Associate,
Urban Institute

Samantha Fu is a senior policy associate in the Research to Action Lab at the Urban Institute, where she ensures that policymakers, practitioners, and advocates can leverage data and evidence to dismantle systemic barriers and create conditions that allow all communities to thrive. She leads and collaborates on projects related to housing, economic, and environmental justice, with a particular focus on how community ownership and control can contribute to more equitable, sustainable, and democratic societies.

Fu joined Urban from the California Policy Lab, where she conducted quantitative research in policy areas ranging from labor and employment to higher education and the social safety net. Before that, she worked in economic consulting at Cornerstone Research, on the analytics team for the 2016 Clinton campaign, and as a Data Science for Social Good Fellow at the University of Chicago's Center for Data Science and Public Policy. She holds a bachelor's degree from McGill University and a master's degree in public administration from the London School of Economics and Political Science.



Keith Fudge

Director, Upward Mobility
Initiative, Urban Institute

Keith Fudge is director of policy management in the Research to Action Lab at the Urban Institute. He directs a body of work focused on increasing mobility from poverty. Previously, he managed technical assistance projects for Urban's Pay for Success Initiative. He also managed the Evidence-Based Policymaking Collaborative, a partnership of experts from four research organizations that provided insight into strategies for applying rigorous evidence to the policymaking process, particularly at the federal level.

Previously, Fudge worked in the US Department of Housing and Urban Development's Office of Policy Development and Research, where he supported research and communications efforts. He was a founding staffer and senior project manager for the White House Council on Strong Cities, Strong Communities.

Fudge has a BA in English from the University of Michigan and an MPP from the University of Michigan's Gerald R. Ford School of Public Policy.



Kosar Jahani

Senior Program Officer,
Bill & Melinda Gates Foundation

Kosar Jahani is a Senior Program Officer with the Economic Mobility and Opportunity team at the Bill & Melinda Gates Foundation. In this role, she develops and advances the foundation's strategy by designing and implementing investment portfolios on research, metrics, and data infrastructure as well as targeted support to local government stakeholders.

Prior to joining the foundation Kosar worked at the intersection of research and practice, most recently as the Director of Impact at Sama, a leading social enterprise employing low-income people from around the world. This work built on her previous experience managing and analyzing data for economic and financial litigation at Cornerstone Research.

Kosar earned her M.A. from The Fletcher School at Tufts University and holds a B.S. in Business Administration from UC Berkeley.



Myra Jones-Taylor

Senior Vice President, Impact and
External Affairs, Urban Institute

Myra Jones-Taylor is senior vice president for impact and external affairs at the Urban Institute, overseeing communications, development, government affairs, and policy impact. With these teams, she sets the vision for how researchers and policy experts across Urban can maximize the impact of their findings and evidence-based recommendations while helping tell the story of how their work changes lives and strengthens communities.

Before joining Urban, Jones-Taylor was the chief policy officer at ZERO TO THREE, where she led the development and implementation of the organization's policy agenda, priorities, and strategies while serving as the principal spokesperson on all policy matters. She previously served as Connecticut's founding commissioner of early childhood, leading the cabinet-level state agency that serves all children from birth to age 5 and is responsible for early care and education, home visiting, and early intervention and childcare licensing. During her time as commissioner, the state agency was awarded \$50 million in new, competitive federal grants and expanded access to high-quality preschool to 25 percent more 3- and 4-year-olds.

Jones-Taylor was a class of 2022 New America national fellow and has been both an Ascend fellow and a Pahara fellow of the Aspen Institute. She writes and speaks about racial identity, systemic racism, and social inequality and has appeared in the *Atlantic* and on the *Longest Shortest Time* podcast. Jones-Taylor received a joint doctorate in American studies and anthropology from Yale University.





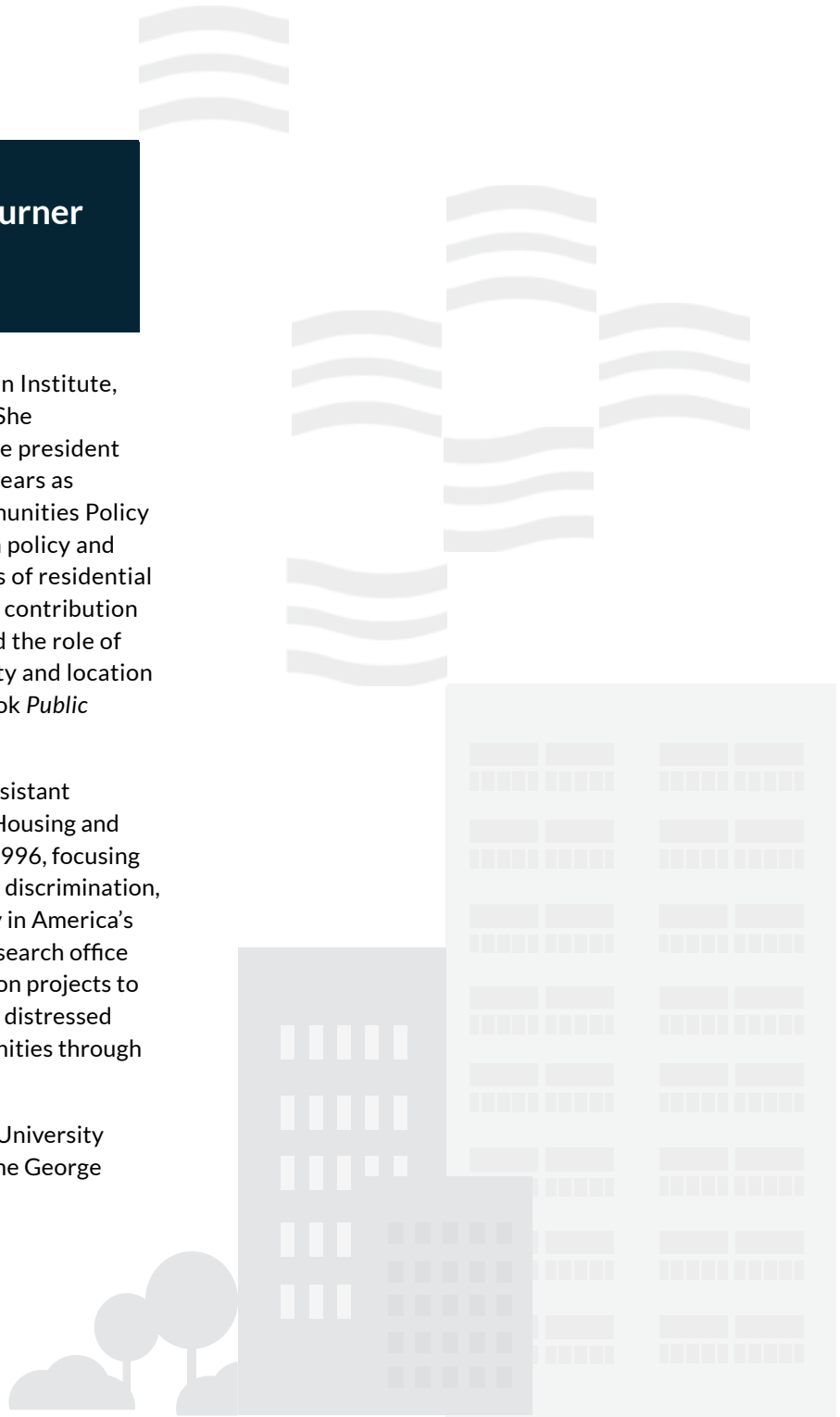
Margery Austin Turner

Institute Fellow,
Urban Institute

Margery Turner is an institute fellow at the Urban Institute, focusing on new research and policy programs. She previously served 10 years as Urban's senior vice president for program planning and management and 11 years as director of the Metropolitan Housing and Communities Policy Center. A nationally recognized expert on urban policy and neighborhood issues, Turner has analyzed issues of residential location, racial and ethnic discrimination and its contribution to neighborhood segregation and inequality, and the role of housing policies in promoting residential mobility and location choice. Among her recent publications is the book *Public Housing and the Legacy of Segregation*.

Before joining Urban, Turner served as deputy assistant secretary for research at the US Department of Housing and Urban Development (HUD) from 1993 through 1996, focusing HUD's research agenda on the problems of racial discrimination, concentrated poverty, and economic opportunity in America's metropolitan areas. During her tenure, HUD's research office launched three major social science demonstration projects to test different strategies for helping families from distressed inner-city neighborhoods gain access to opportunities through employment and education.

Turner has a BA in political science from Cornell University and an MA in urban and regional planning from the George Washington University.



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