



Student Upward Mobility Initiative 2025 Request for Proposals: Informational Webinar



Housekeeping

- Event is being recorded, and the recording will be posted online afterward.
- Hide captions or adjust settings with the Live Transcript button.
- Speaker biographies are available on the Events page at Urban.org.
- Participants are muted. Type your **questions** and **comments** into the Q&A box.
- Engage with us online using #LiveAtUrban.

Welcome!

Agenda

- About SUMI
- Key Mobility Concepts
- 2025 Funding Opportunity
- Application Process
- Q&A

Bottom Line: Education-to-Upward Mobility R&D Initiative Accepting Applications Now!

- 2025 RFP: up to \$3 million in total awards
- Timing
 - **Optional** 1-paragraph idea for feedback: by September 19
 - **Mandatory** LOI: by October 10
 - **Invited** full proposal: by January 6
- Budget should correspond to project's likely impact and proposed activities: \$50,000 to \$500,000
- 15% indirect rate cap
- Project duration up to 24 months

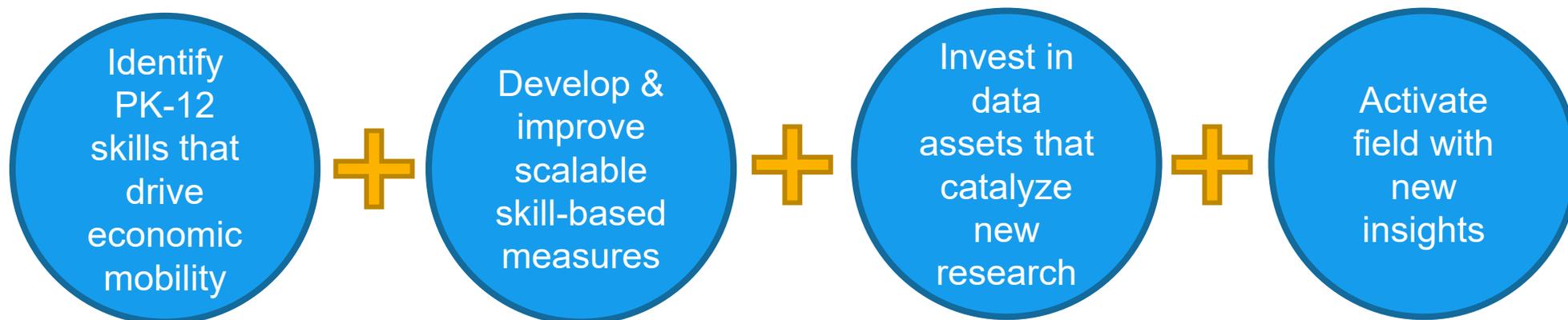
About SUMI

Motivation for the Initiative

- Education → lifelong success, but this link is broken for too many students.
- Which PK–12 skills and competencies boost later economic mobility? Communities and employers agree on many of them, but do we actually know? And how much does context matter?
- Yet, the indicators and measures we use are largely experiences and credential based.
- Need for more skill-based measures that we can intervene on & ones that are tied to students' later economic mobility

Student Upward Mobility Initiative

Build an education-to-economic-mobility research field so schools, policymakers, and program designers can prioritize skills and competencies that promote the upward mobility of PK–12 students



Meet the SUMI team



Maggie Reeves
Co-Principal Investigator



Karishma Furtado
Co-Principal Investigator



Eden Phillips
Project Manager



Kristin Blagg
Research Advisor



Rachel Lamb
Data Asset Manager



Emily MacLachlan
Engagement Coordinator



Todd Greene
Senior Research
Advisor



Rekha Balu
Senior Research
Advisor



David Figlio
Senior Research
Advisor



Matt Chingos
Emeritus Principal
Investigator

Meet the Advisory Council



Jen Alexander
Executive Director, PIE Network



Rob Alexander
Vice Provost and University
Dean for Enrollment
Management, University of
Rochester



Bob Balfanz
Distinguished Professor of
Education; Co-Director of Center
for Social Organization of Schools;
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Johns Hopkins University



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Director of Student Access and
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Public Policy and Economics;
Director, California Policy Lab,
University of California, Berkeley

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Advisors

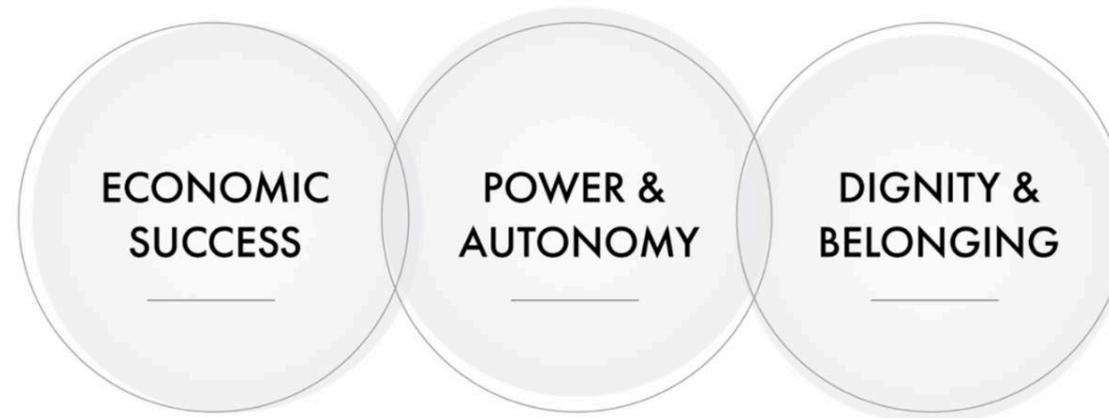
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Family
Foundation

The
Joyce
Foundation

Key Mobility Concepts

Holistic Definition of Mobility

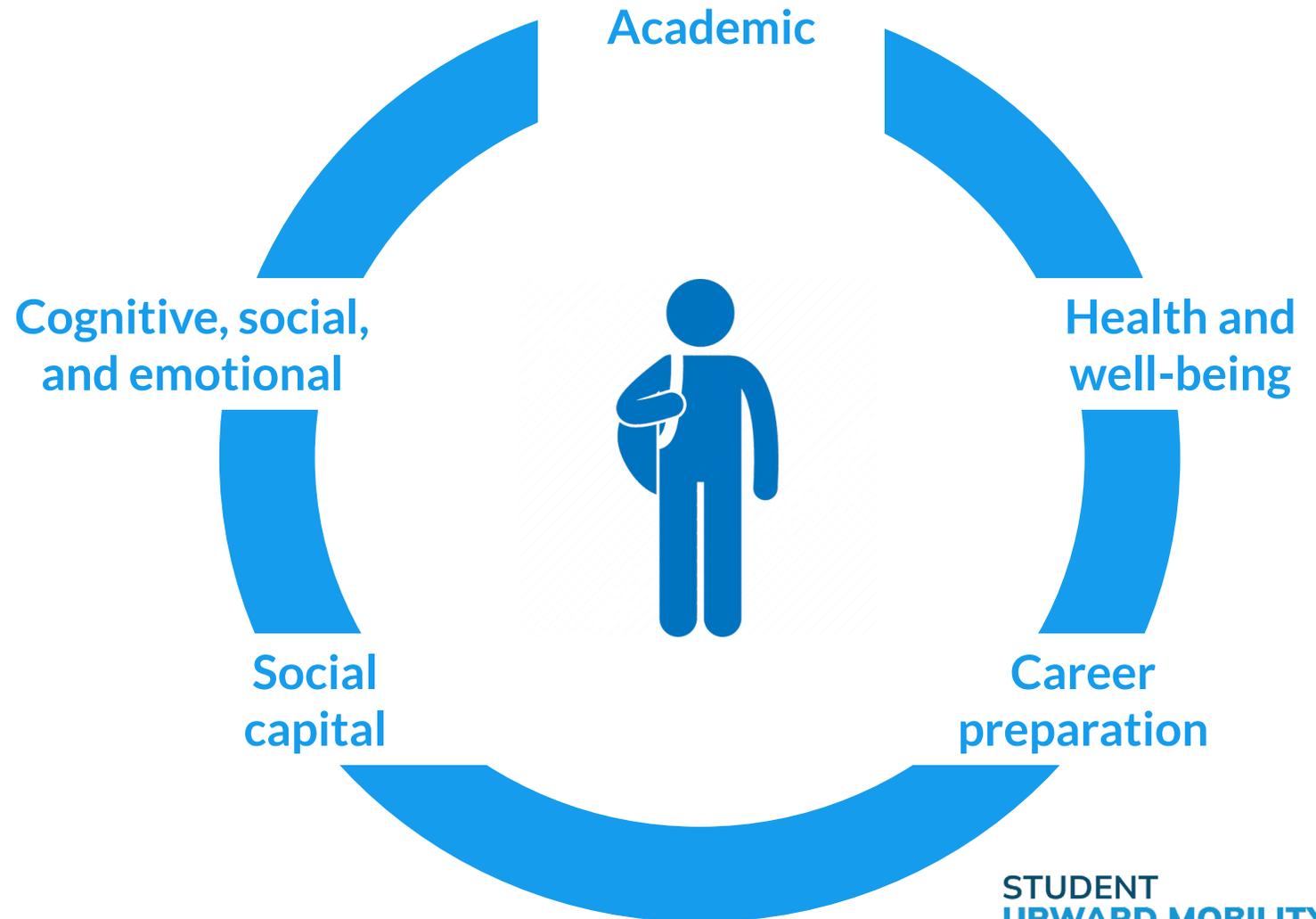
UPWARD MOBILITY FROM POVERTY



Source: Urban Institute's [Upward Mobility Framework](#)

Individual-Level Skills and Competencies

- Skills and competencies over experiences and credentials,
 - ✓ math skills
 - ✗ math coursework
- Instruction and intervention → **skills and competencies** → **upward mobility**



Three Ways Contextual Factors Shape Student Success in School and Beyond



1.

Non-school factors
that shape
readiness to learn



2.

Factors that
affect schools and
school systems'
effectiveness



3.

Factors that modify
how success in
school translates
into long-term
success

Resources to Help You

- [Field resources page](#)
 - Research synthesis
 - Skills, competencies, and contextual factors of interest
 - What we mean by economic mobility
 - Individuals in context
 - Informing the National Governors Association about high schoolers' readiness for success
- [Blog](#)
 - Our thinking and insights
 - Insights from field leaders

2025 Funding Opportunity

2025 RFP Focus

Skills and competencies in **late high school** (grades 11–12) that propel students into economic mobility and the ways in which **skill development** and **access to opportunity** in **early high school** and **middle school** shape those trajectories

Insights from this new cohort will provide information to high school redesign, career-connected learning, and competency-based education efforts with evidence to improve programming, policy, interventions, and investments

Some big questions we hope this RFP will help answer

What skills and competencies do high schoolers need to be on track for upward mobility?

Which skills are necessary for all mobility-boosting next steps out of high school, and which are key for specific next steps in college, career, and the military?

Which skills develop during middle school and show continued development in high school? Via what mechanisms?

To what degree do skill development trajectories vary by student characteristics and why?

How do school structures such as options for advanced coursework, tutoring, course-taking patterns like tracking and pathways, and career-connected learning factor in?

Track 1: Measure Development

Develop new or improved measures of skills and competencies, ideally demonstrating how they perform (e.g., content alignment, validity, and reliability) compared with existing measures.

Mobility driver categories of interest	<ul style="list-style-type: none"> ✓ Cognitive, social, emotional ✓ Social capital ✓ Career preparedness
Time horizon of interest	<ul style="list-style-type: none"> ✓ Middle-to-high-school transition ✓ High-school
Strategic considerations and priorities	<p>Scalable, implementable measures:</p> <ul style="list-style-type: none"> • Use classroom technology, assessment platforms, or other existing data—so we know they can be scaled • Tell us how other measures can easily be implemented by state and local education agencies

Track 2: Identifying and Validating Mobility Drivers

Link high school skills and competencies to adult mobility outcomes and/or examine the role and relative weight of contextual and structural factors in explaining long-term outcomes in comparison or in addition to individual skills

Mobility driver categories of interest	<ul style="list-style-type: none"> ✓ Cognitive, social, emotional ✓ Social capital ✓ Academic subskills
Time horizon of interest	<ul style="list-style-type: none"> ✓ High school
Additional methodological interests	<ul style="list-style-type: none"> • Examine skill development and knowledge acquisition trajectories by linking middle school/early high school skills to late high school and adult outcomes • Investigate clusters of skills and competencies to show how they relate to adult outcomes interactively and independently • Causal study designs, mechanisms

Track 1 Example: Measure Development

- Use AI to determine if question-taking patterns in adaptive educational technology platforms can measure self-management as well as existing instruments. Examine how the measure performs for students in schools that are well vs. poorly funded and for students who have different levels of baseline content knowledge.
 - ✓ Clear skill/competency identified in a category of interest to SUMI
 - ✓ Clear consideration of how skills/competencies exist in context (school funding)
 - ✓ Clear scalability
 - ✓ Comparison to existing measure to evaluate measure performance

Track 2 Example: Driver Validation

- Examine the degree to which SAT/ACT detailed or sub-scores (e.g., algebra, production of writing) predict adult success at age 30 and how that predictiveness compares to that of composite scores, for students overall and for students starting at or near poverty.
 - ✓ Skills (in the form of domain-specific knowledge and ability) focus
 - ✓ Comparison to a standard college and career readiness metric for benchmarking purposes
 - ✓ Focus on students with a background of economic disadvantage, enabling conclusions about economic mobility
 - ✓ Consideration of individuals in context (how/why might effects differ by economic background)

Hybrid Example

- Develop a measure of network mobilization skills in high school. Determine its predictiveness of adult outcomes 1) in contexts with different degrees of access to neighborhood and high school social capital and 2) among students who are more vs. less civically and extracurricularly engaged.
 - ✓ Clear skills focus
 - ✓ Close examination of effects for those from economically disadvantaged backgrounds, which makes it possible to draw conclusions about economic mobility
 - ✓ Consideration of skills in context (access to social capital)
 - ✓ Interrogation of mechanisms (skill + practice → outcomes)

Reminders across tracks

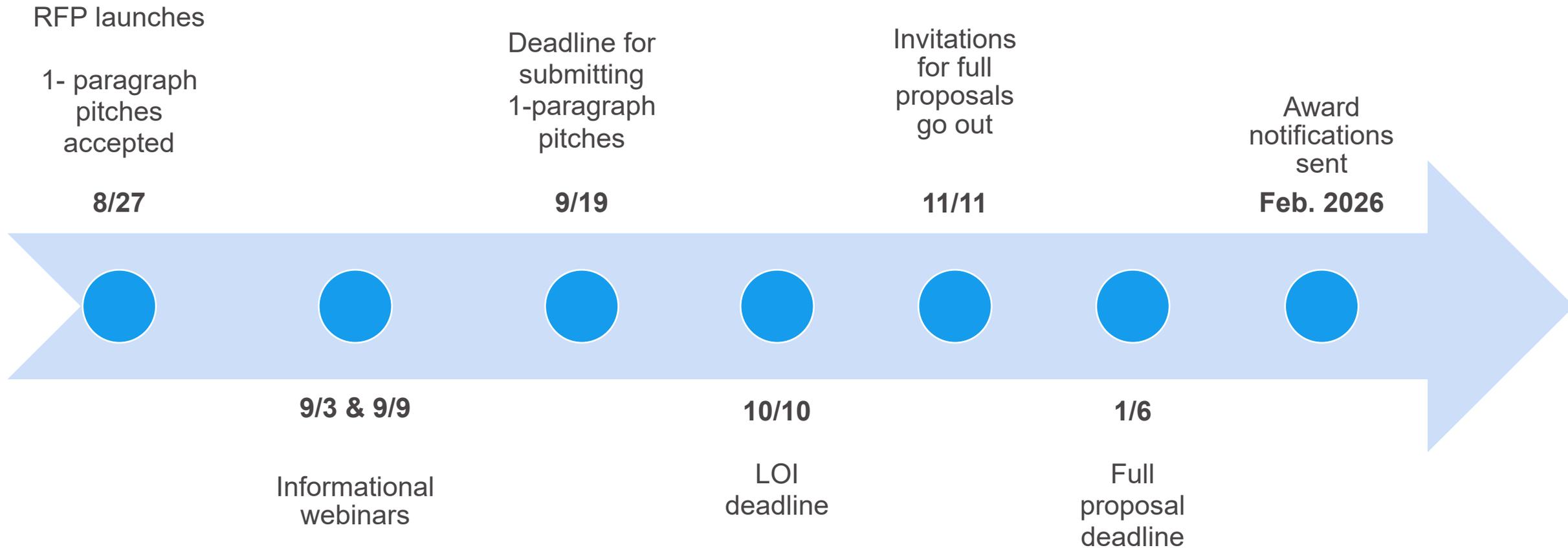
- Focus on skills and competencies (that are malleable by schools) as opposed to credentials and experiences
- Integrate contextual factors into study—skills are not developed in isolation
- Think about getting beneath the black box of any interventions or programs to focus on the skills they aim to improve (i.e., program evaluations are allowed as long as the skills/competency focus is clear)
- Imagine a policymaker wanting to use your eventual findings—how could they implement this or it give them a value add beyond what they currently use to assess student readiness for success
- Keep upward mobility and students toward the lower end of the income distribution top of mind

Application Process

RFP Administrative Details

- Application open now
- \$50,000-500,000 budgets; 15% IDC
- Up to 24 month duration
- Mandatory LOI; invited full proposals

Apply! And Tell Your Friends!



A Strong Proposal is Oriented around SUMI's Principles

Initiative
alignment

Feasibility
and rigor

Ingenuity

Actionability

Field
building

Next Steps

- Check out full RFP and lots of other good stuff on the [SUMI website](#)
- [Sign up](#) to stay up to date with SUMI
- Share this opportunity
- Submit a [one-paragraph idea](#) for quick feedback by 9/19
- Complete the event survey (see chat for link)

Questions?



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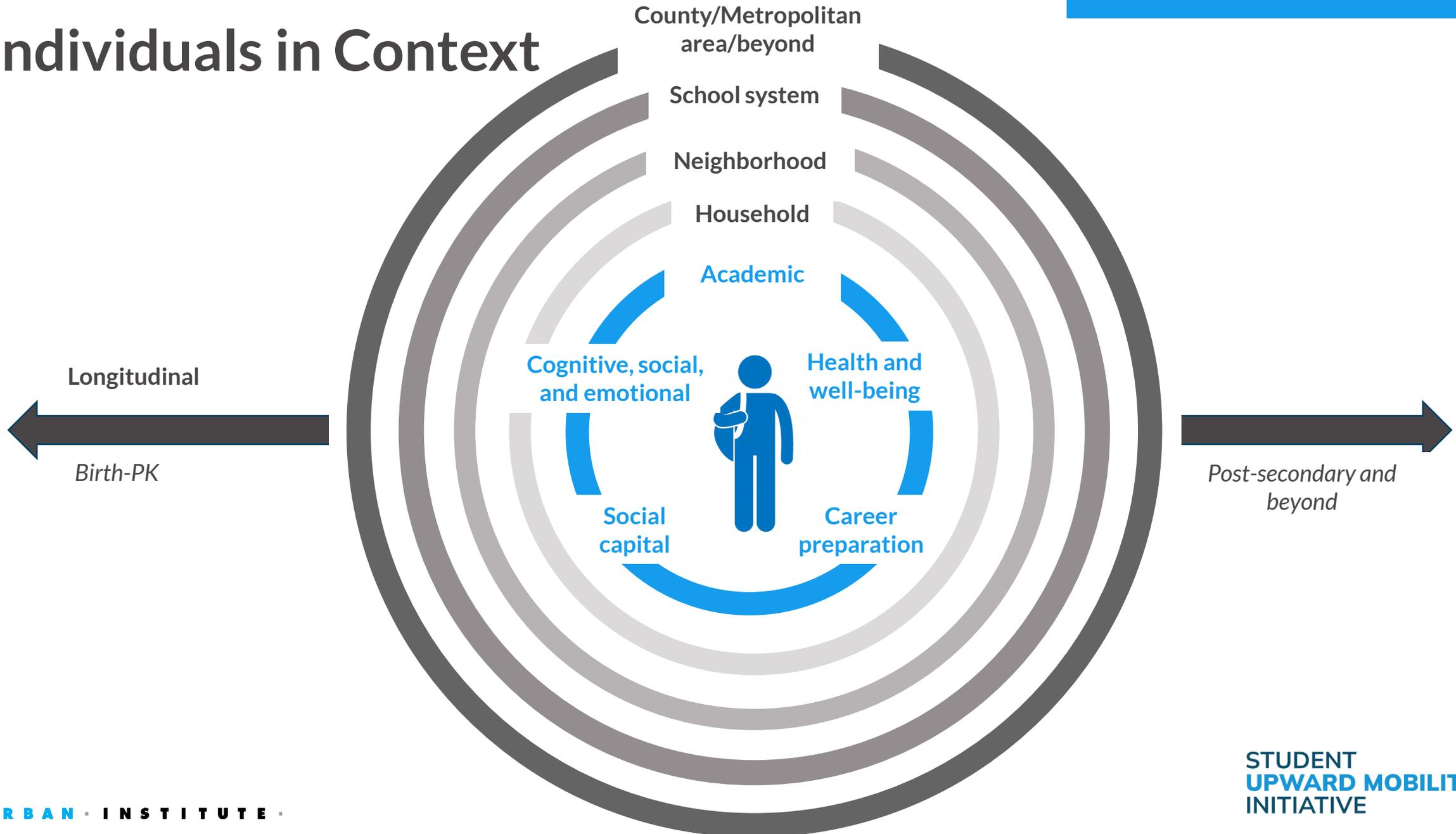


Appendix

Definition of Mobility

	Broad definition	Example data from our current cohort	Education-to-Workforce Indicator Framework Resources
At or near poverty in childhood	Toward the lower end of the socioeconomic spectrum while in PK-12	<ul style="list-style-type: none"> FRPL eligibility Direct certification eligibility Mother's income 	
Economic success	Adequate income and assets to support their and their family's material well-being	<ul style="list-style-type: none"> UI wages IRS income records Credit bureau debt and family income estimates 	<ul style="list-style-type: none"> minimum economic return economic mobility economic security food security access to jobs paying a living wage
Power & autonomy	Has control over their life, makes choices, and influences larger policies and actions that affect their future	<ul style="list-style-type: none"> Health insurance coverage 	<ul style="list-style-type: none"> health insurance coverage
Dignity and belonging	Feels the respect, dignity, and sense of belonging that comes from contributing to and being appreciated by people in their community	<ul style="list-style-type: none"> Voting records 	<ul style="list-style-type: none"> civic engagement

Individuals in Context





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