Valuing Our Insights and Community Expertise (VOICE) Research Agenda

VOICE Project Objectives

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The VOICE project demonstrates how participatory research methods can generate insights in the field of economic mobility that are methodologically rigorous and rooted in lived experience. The project has two primary objectives:

1. Engage individuals with lived experience facing financial hardship to build a **research agenda for the economic mobility field** that captures common experiences and key unanswered questions about the economic mobility journey.
2. Develop a **participatory research framework and methodology** that researchers, organizations, and institutions can adopt when studying economic mobility.

VOICE Project Phases

1	**Methodology design:** October 1 - Dec 20	Developed Research statement and Participant engagement framework
2	**Theory formation:** Jan - April 25, 2025	Bilingual weekly meetings with 15 VOICE Board members to develop research agenda
3	**Validation:** April - July 18, 2025	Co-design of research activities with VOICE Board to validate initial research agenda
4	**Dissemination:** July - September 26, 2025	Dissemination of research agenda and creation of Participatory Research Guidebook

Validation through a case study on the first years of the COVID-19 pandemic

Acknowledging that the insights from the VOICE Board, a sample size of 15 participants, cannot fully capture the full range of economic mobility experiences across diverse US populations, the validation phase expanded our understanding of economic mobility through a case study on the COVID-19 pandemic, which frequently emerged as a theme during VOICE Board discussions. A case study approach is well suited to studying economic mobility as it addresses the methodological challenge of studying a multidimensional phenomenon, where multiple variables interact in complex ways.

Through an extensive literature review and a survey to a nationally representative sample of people who have experienced financial hardship or economic transitions, the VOICE Board refined the research agenda with insights from the experiences of diverse communities during the first two years of the COVID-19 pandemic. This analysis has resulted in a final research agenda that has both emerged directly from people with lived experiences and is generalizable across a diverse range of experiences with economic mobility in the US. See the full research methods here.

VOICE Board Members

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COVID made me stop, but only because I had no choice. That’s when I realized I had nothing left in the tank.

I think collectively in the midst of COVID, we all had to face our mortality…So in the face of people facing their mortality, they decided, ‘You know what? Um, yeah, we are gonna live’… They're like, ‘now I know what work life balance is like, my time here is more precious than money’.

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VOICE Research Agenda

Economic mobility must be studied with participatory methods that center people with lived experience throughout the whole research process

The VOICE project advocates for participatory research methods in economic mobility studies, centering people with lived experience as partners and experts throughout the entire research process. Rather than being passive subjects, participants should be co-researchers collaborating from initial design through to dissemination.

By combining the VOICE Board's deep, first hand understanding of financial hardship with UpTogether research team's technical expertise, the VOICE project's collaboration has produced research that is both academically rigorous and deeply relevant to real-world experiences.

The VOICE Research Agenda demonstrates the transformative potential of participatory research. The research identified by the VOICE span multiple academic disciplines and integrate diverse theoretical frameworks, creating a comprehensive understanding of economic mobility that honors the complex and multidimensional nature of lived experience.

VOICE calls for a panoramic understanding of economic mobility–one that includes upward and downward mobility as well as moments of pause

Mobility is about more than dollars and cents–it's shaped by emotional, social, structural, and collective forces. To understand the experiences of people facing financial hardship, researchers must explore these interconnected dimensions of mobility. **Panoramic Economic Mobility** recognizes that economic mobility is both multidimensional and nonlinear, with individuals moving in and out of states of progress, loss, and pause throughout their lifetimes.

Economic pause is a critical and unexamined part of this cycle. The VOICE Board emphasizes that economic mobility is not always upward or downward, and mobility includes pauses that shape people's financial paths. Pauses can look like economic plateaus that are imposed by structural barriers, or they can be voluntary moments of pause that allow for reflection and recalibration. Pauses can be stabilizing or stifling–and must be studied as key moments in economic mobility.

In addition, the VOICE Board prioritizes studying **Downward Mobility,** when systemic barriers, unexpected crises, or policy failures create setbacks. Recognizing the challenges and opportunities within economic mobility are key to creating solutions that promote resilience and long-term stability.

Economic pause is a critical juncture that can lead to a new direction or a plateau that keeps people stuck between upward and downward mobility

Economic pauses are a critical component of mobility and the conditions surrounding pause determine whether it is a pathway to mobility or a cycle of maintaining without upward motion.

Forced pauses are imposed by structural barriers like glass ceilings, policy restrictions, or systematic exclusion that halt progress without financial loss. VOICE Board members described these as moments when “you had no choice” but to stop moving forward. These pauses are not restorative and prevent people from the next level of opportunity.

Voluntary pauses are chosen moments of rest, reflection and strategic planning. These pauses allow people to regroup, pursue purpose and create the conditions to move forward with intention. Voluntary pauses provide essential time to recover from the stress of experiencing financial hardship. However, access to voluntary pause is shaped by structural privilege. For some, it is viewed as restorative or strategic, while for others, it is framed as laziness.

VOICE believes that understanding the Grace Economy is critical when researching economic mobility

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When researching economic mobility, researchers must also study the pauses, plateaus, and pivots where the direction of mobility is determined. The VOICE Board identified the need to investigate what the VOICE coins as the **Grace Economy**.

The Grace Economy is the system of public policy and cultural norms that govern access to:

- Public benefits (e.g. SNAP, fair and equitable housing, tuition assistance, etc)
- Workplace and caregiving flexibility
- Cultural and social acceptance of voluntary pauses to rest, reflect, and plan
- Informal social networks of collective care, social capital and reciprocity

The Grace Economy describes the underlying conditions that make voluntary pauses possible, especially during economic hardship or transition. It includes both material supports and social acceptance of rest, reflection and strategic planning and a rejection of productivity as the sole means of upward mobility.

VOICE advocates for research on economic mobility to look at the system, community, and individual levels

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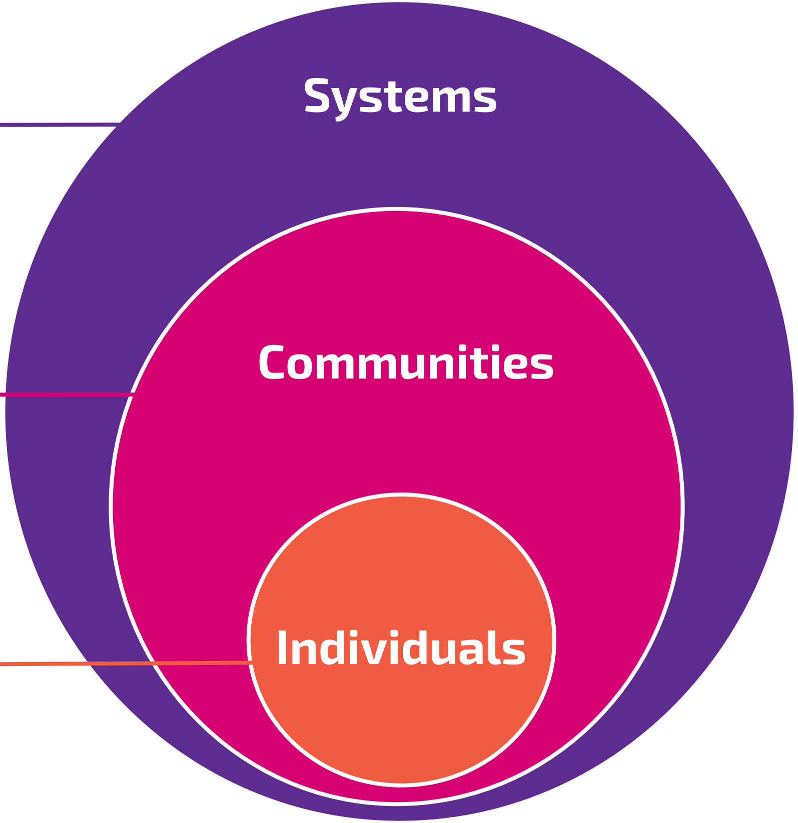
Research how systems create conditions for upward mobility, downward mobility and economic pause for some but not others. Examine how structural barriers impose forced pauses for minoritized communities while allowing pause for privileged classes.

Investigate how collective care is an essential function for economic mobility. Study how mutual aid networks sustain people during economic setback and forced pause, and how communities create conditions for rest and reflection when systems fail.

Explore the relationship between rest, mental health and sustained economic mobility. Research how voluntary pause enables the transition from survival to self-actualization, and how individuals navigate the emotional dimensions of moving through states of progress, loss and pause.



The multidimensionality of social and structural inequities

Explore how economic pause and expectations of productivity are influenced by white supremacy, racism, sexism, and classism.

When discussing economic pauses, VOICE Board members described how white supremacy culture defines rest as something reserved for whiteness and wealth while pathologizing it in Black, Brown, immigrant, and working-class communities. Rest is framed not as recovery, but as laziness or failure when taken by racialized groups who are expected to be constantly producing, and enduring. Rest stigma is also gendered, reflected in the lived experiences of the women in the VOICE Board who often carry multiple forms of labor, both paid and unpaid, with no room to pause.

For VOICE, rest is a necessary condition for upward economic mobility. Without time to reflect, recover, or plan, economic mobility becomes reduced to survival.

Board members emphasized the need to recognize rest as a part of mobility and create conditions enabling rest. Research should investigate how racism, sexism, and classism restrict access to rest. Policy makers must understand how white supremacy culture is embedded in economic, social and political systems, shaping whose mobility is supported and whose is not permitted.

The Grace Economy governs pause, shaping whether rest becomes a bridge or a barrier

Study the Grace Economy to better understand how public policy, cultural narratives, and social networks determine whether a pause becomes forced or a bridge to upward mobility.

The VOICE asserts that the **Grace Economy** is decisive in whether people can pursue personal and financial recovery, or remain stuck in cycles of *urgency, stagnancy, and poverty*. Economic mobility research must examine how public policy, cultural narratives, white supremacy, and social networks interact to either enable or restrict access to restorative pause.

This includes studying how cash-based public benefit systems support or penalize strategic pauses; how societal and cultural expectations around race, class, gender, and health legitimize rest as necessary for economic advancement and personal fulfillment for some, while denying it to others; how networks of collective care fill critical gaps of financial need when public benefit structures fall short or don't exist; and what conditions allow individuals to move from the paused place into period of upward mobility with clarity, agency, and support.

COVID-19 Case Study Survey Insights

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I work in the healthcare field but also had school aged kids who were sent home for months. So there were days that I would have to stay home and monitor tests. Hours were cut due to the providers doing virtual care.

The COVID-19 pandemic forced a pause for caregivers. Among communities experiencing financial hardship, 85% lost jobs, quit, or reduced hours during 2020 shutdowns, with 73% leaving work due to caregiving responsibilities. Of these caregivers, 88% had been primary breadwinners. **Black or African American women aged 26-34 represented 44% of all breadwinner-caregivers forced from the workplace**, 3.14 times higher than statistically expected.

Access to supportive systems as a critical driver of mobility

Study the effects of structural improvements to systems including transportation, housing, healthcare, childcare, and food on sustainable upward mobility at the community level.

VOICE Board members emphasized that true and lasting economic mobility requires simultaneous improvements in access to basic needs. Board members consistently noted that systemic inequities in access to infrastructure for basic needs disproportionately impact marginalized communities, exacerbating economic hardship and limiting opportunities for upward mobility.

Structural racism, inadequate infrastructure, gentrification, and persistent barriers like food deserts and transportation access were identified as critical forces that reinforce patterns of economic immobility. Policy failures, rising costs, and administrative burdens were cited as significant and seemingly insurmountable obstacles to economic mobility. The benefits cliff, where small increases in income result in dramatic loss of essential support, like healthcare, food assistance and housing vouchers, creating perverse incentives that trap families in poverty by making upward mobility financially punishing.

Policy-makers must understand how communities navigate systems to access basic needs. Prioritize research at the systems level on accessibility to services and study improvements that promote sustainable upward mobility, because where there is no change there can be no change.

COVID-19 Case Study Survey Insights

I was the "Go to Girl" for anyone who needed to access assistance or needed help applying for assistance or reaching the places to get assistance

I helped walk them through applying for benefits TANF, SNAP, and Medicaid

70% of people facing financial hardship received financial relief from pandemic era public programs, however **42% experienced delays getting the relief** due to offices shutting down during early pandemic lockdowns and confusing application processes.

The importance of collective care for resilience

Research how social capital exchange within communities during times of collective and individual crisis can create economic calm enabling upward mobility.

VOICE Board members consistently highlighted collective care–such as mutual aid (e.g., sharing childcare and community meals), informal networks, and everyday solidarity–as indispensable, especially during crisis such as COVID-19 and natural disasters. Social capital was framed not as supplementary, but essential to sustained emotional resilience and community cohesion.

Stability enables redistributive participation–the ability to contribute to one's community in non-material ways. VOICE board members discussed how when they gain financial stability, they have the capacity to mentor, advocate and take part in community policy and decision making. Economic mobility is not just about individual progress, but progress that strengthens the collective well-being of a community.

Research should investigate policies that support community networks and their effects on collective and sustainable economic mobility.

COVID-19 Case Study Survey Insights

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> *I was helping my elderly neighbor who was scared to leave her house by bringing her meals and groceries and cleaning supplies for her. Even spending personal time so she won't feel alone.*

Despite being the most in need, **one in six people facing financial hardship did not receive COVID-era public support**. They leaned on community to cope: 45% got help from family and friends, and 31% relied on free meals. Notably, those who didn't get public relief were just as likely to give back as those who did: 72% of non-recipients helped others during the pandemic.

The effects of moments of pause on mobility journeys

Study the relationships between financial security, mental health, and sustained economic mobility, and in particular the role of stability, or pause, in enabling self-actualization.

Economic mobility is nonlinear and shaped by opportunity and access to resources. VOICE board members emphasized the importance of economic relief, the feeling of being in a paused place, when navigating the ups and downs of mobility.

Economic instability forces constant movement–reacting to crises, obtaining resources, navigating bureaucratic hurdles and making tradeoffs to survive. When Board members discussed times they are economically mobile, the discussions centered on the moment where they reached a place of stability, when financial turbulence stops and pause becomes possible. They emphasized that pausing without shame or penalty is essential for true mobility. Rest allows people to regroup, pursue purpose, and move forward with intention.

Research should explore how policies can promote stability, support individuals and families during moments of pause, and protect people from being penalized by pausing. Policy-makers must understand emotional resilience and self-actualization as core dimensions of economic mobility.

COVID-19 Case Study Survey Insights

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I was able to invest financially, make my own hours, help families

I got into the esthetician line of work and started doing facials for my family then it went on to a small but steady clientele

43% of those who experiencing financial hardship said that public relief dollars opened up new economic opportunities, including saving money, making a positive career change and pursuing education. In this group, Asian American and multi-racial respondents were significantly more likely than other groups to say that pandemic relief money opened up new opportunities for them.

The effects of unmet basic needs

Study the psychological, emotional, and physical effects of navigating economic mobility.

VOICE Board members described the ongoing, exhausting nature of experiencing financial hardship, and even when a financial situation improves, stress often remains. For example, a core driver of financial hardship is employment offering wages too low to meet basic needs. As a result, many must work excessive hours just to stay afloat, with no time to rest, recover from illness or manage chronic health conditions–leading to worsening health and limiting mobility. The sudden loss of critical supports after even a modest wage increase (the benefits cliff or the cliff effect) creates new financial crises and increases mental strain.

A deterioration in a financial situation can be a cause for mental health struggles, as one crisis can cause financial spiraling. Experiencing financial hardship is often accompanied by deep shame and embarrassment, making it difficult to ask for help, even when help is urgently needed.

Board members described how current policies and systems fail to account for the emotional and psychological weight of economic hardship. Policymakers must address the mental health impacts of financial instability and the trauma caused by policy failures like the benefits cliff, a structural catch-22 within economic mobility.

COVID-19 Case Study Survey Insights

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> *I felt unable to do a lot including paying rent and just getting by day by day. I had lost income, almost got evicted, and suffered my son getting sick and staying in the hospital also.*

Formal eviction affected only 12% of people facing financial hardship, but eviction worry was common. Among those with job loss or reduced hours, 71% worried about displacement, compared to 34% of those who kept their jobs. **Nearly half of those who lost work developed entirely new housing related anxieties during the pandemic.**