

The Panoramic View: Rethinking Economic Mobility Through Community Eyes

A Participatory Research Guidebook

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Introduction

The Valuing Our Insights and Community Expertise (VOICE) Project is a field-tested framework for participatory research investigating economic mobility in the United States.

Recognizing UpTogether's deep ties with its membership of people with lived experience of financial hardship, a foundation approached us to develop innovative approaches to understanding economic mobility from a lived experience perspective. Developed through this partnership, 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 VOICE Project positions people with lived experience as co-creators of knowledge, research partners, and interpretive authorities over the experiences of those who are and have experienced financial hardship, as well as economic mobility.

Over nine months in 2025, a community research board (or Board) with 15 community members across the United States collaborated with UpTogether researchers to develop a research agenda that reflects the research priorities of people navigating economic transitions. This collaboration revealed previously invisible mechanisms of economic mobility, offering new perspectives to expand and complement existing research approaches.

Why Participatory Methods Matter for Economic Mobility Research

Economic mobility research has made tremendous advances through sophisticated quantitative methods combined with rigorous analytical frameworks and access to large-scale administrative datasets. These contributions form the essential foundation of our understanding of mobility patterns and systemic factors that shape economic outcomes. As the field of economic mobility is united by the goal of understanding entrenched poverty, we as scholars and practitioners in the field have the opportunity to expand our analytical toolkit by incorporating participatory methods that can address questions difficult to measure by quantitative modeling alone:

Illuminating Hidden Mechanisms: While quantitative modeling is well-suited for identifying correlations and isolating factors to explore causation, participatory approaches can help us understand the fine-grained mechanisms that drive mobility.

Combining data showing *what* happens **with** community insights about *how* it happened holds the promise of developing more complete explanatory models. For example, quantitative methods can show that the child tax credit contributed to a 46% decrease in child poverty¹, while participatory methods can explore the mechanisms by which families with children achieved this significant change.

Enhancing Policy Effectiveness: Economic policies designed to promote mobility sometimes fall short of their intended outcomes. For example, impact evaluations have found that workforce development policies often result in small short-term income gains, but no significant gains in the medium and long-term². Participatory methods can help us understand how policies interact with people's lived realities, daily constraints, and survival strategies – insights that can inform more effective policy design and implementation.

Expanding Measurement Opportunities: Participatory methods can complement standard mobility metrics by revealing additional economic strategies, patterns, and transitions that people facing financial hardship experience. By incorporating insights from those with lived experience, we can design research questions that better address the real-world complexities of economic mobility.

How to Use This Guidebook

This guidebook is organized around the stages of implementing participatory research in topics of economic mobility. Whether you're completely new to participatory methods or looking to refine or expand existing approaches, you can navigate based on where you are in your research process:

Planning Stage (Chapters 1-2)

¹ Burns, Kalee, Liana Fox, and Danielle Wilson. 2022. "Expansions in to the Child Tax Credit Contributed to 46% Decline in Child Poverty Since 2020." *United States Census Bureau*. September 13.

<https://www.census.gov/library/stories/2022/09/record-drop-in-child-poverty.html>

² Peck, Laura R., Schwartz, Deena, Strawn, Julie, Weiss, Christopher C., Juras, Randall, Mills de la Rosa, Siobhan, Greenstein, Nathan, Morris, Tori, Durham, Gabriel, & Lloyd, Charlotte. 2021. A Meta-Analysis of 46 Career Pathways Impact Evaluations. Report prepared for the U.S. Department of Labor, Chief Evaluation Office. Rockville, MD: Abt Associates.

https://www.abtglobal.com/files/insights/reports/2022/a-meta-analysis-of-46-career-pathways-impact-evaluations_final-report.pdf

If you're considering whether or not participatory research can enhance your work, these chapters explore the theoretical foundations and practical rationale for incorporating community expertise into economic mobility studies. Chapter 1 makes the case for participatory approaches, while Chapter 2 provides concrete guidance for recruiting community research partners and establishing the logistical infrastructure, including creating power-sharing and governance structures that transform participants into genuine research partners.

Implementation Stage (Chapters 3-4)

When you're ready to move on from planning to practice, these chapters guide you through the core qualitative and quantitative methodological processes. Chapter 3 explores qualitative approaches and will guide you through conducting community conversations, co-developing research questions, and community-led analysis techniques. Chapter 5 will walk you through how to apply participatory principles to survey design and collaborative quantitative analysis.

Innovation and Learning (Chapters 5-6)

These final chapters examine the unique insights that emerge from participatory economic mobility research. Chapter 5 explores the innovative conceptual frameworks that emerged from the VOICE Project, including economic pause, the Grace Economy, and Panoramic Economic Mobility. Chapter 6 invites the economic mobility research community to engage with participatory methods.

This guidebook represents more than just a methodological manual; it's an invitation to expand analytical possibilities of economic mobility research by incorporating the intellectual contributions of people with lived experience of financial hardship. The approach outlined in this book demonstrates how participatory methods can reveal new dimensions of economic mobility and enhance our collective understanding of how people navigate complex economic systems.

Chapter 1: The Case for Participatory Economic Mobility Research

Participatory economic mobility research is a collaborative research approach designed to endure and establish structures for participation by people with lived experience of financial hardship, community representatives, and trained researchers to collaboratively engage in the research process and to improve our collective understanding of economic mobility.

This chapter provides an overview of applying participatory research principles to economic mobility studies and accomplishes the following objectives:

- Review the principles and foundations of participatory research that inform VOICE methodology
- Discuss the rationale for adopting participatory research in economic mobility research, and when it might be most valuable
- Introduce the VOICE Project as a pioneering example of participatory economic mobility research
- Compare participatory approaches with traditional economic mobility research
- Describe the strengths and limitations of participatory approaches when applied to economic mobility

Foundations of Participatory Research Applied to Economic Mobility

VOICE Project methodology draws from several established participatory research traditions. Foundational to VOICE methodology is Community-Based Participatory Research (CBPR)³, which emphasizes equitable partnerships where community members, researchers, and organizational representatives collaborate throughout the research process. Commonly used in public health settings⁴, CBPR recognizes that those most affected by issues being studied possess essential expertise that can enhance research quality and relevance.

³ Hacker, Karen. 2013. *Community-Based Participatory Research*. Sage: Los Angeles.

⁴ Leung, Margaret W., Irene H. Yen, and Meredith Minkler. 2004. "Community Based Participatory Research: A Promising Approach for Increasing Epidemiology's Relevance in the 21st Century." *International Journal of Epidemiology*. 33(3): 499–506. <https://doi.org/10.1093/ije/dyh010>

VOICE also draws inspiration from Participatory Action Research (PAR)⁵, which focuses on creating actionable outcomes that address community-identified needs, with the intention of informing policy and systems change. PAR involves iterative cycles of planning, action and reflection, when research findings can immediately inform community-driven solutions and advocacy efforts.

Lastly, the VOICE project borrows from Community Voice frameworks^{6, 7} that emphasize engaging community members in meaningful decision-making processes throughout research question formulation to dissemination. Community Voice uses power-sharing strategies that range from meaningful consultation to full community ownership of research initiatives.

When applied to economic mobility research, these frameworks position people with lived experience of financial hardship as intellectual contributors and research partners rather than research subjects. This positioning acknowledges that people actively navigating often difficult economic transitions possess deep expertise about economic systems, policy implementation, resource access strategies, and complex factors that facilitate or constrain economic advancement.

Rationale for Participatory Economic Mobility Research

Economic mobility research serves several critical purposes: understanding the root causes of economic inequality and persistent poverty⁸, measuring patterns of mobility across and within generations⁹, and identifying the factors that support or constrain economic

⁵ Baum, Fran, Colin MacDougall, and Danielle Smith. 2006. "Participatory Action Research." *Epidemiology and Public Health*. 60(10): 854-857. <https://jech.bmj.com/content/60/10/854>

⁶ Sankofa, John, Hannah Daly, and Elsa Falkenburger. 2021. "Community Voice and Power Sharing Guidebook." *The Urban Institute*. https://www.urban.org/sites/default/files/publication/104939/community-voice-and-power-sharing-guidebook_0.pdf

⁷ Seldon, Willa, and Matthew Forti. 2013. "From Input to Ownership: How Nonprofits Can Engage with the People They Serve to Carry Out Their Missions." *The Bridgespan Group*. July 31. <https://www.bridgespan.org/insights/from-input-to-ownership-how-nonprofits-can-engage>

⁸ The Urban Institute. *Upward Mobility Framework*. <https://upward-mobility.urban.org/framework>

⁹ Torch, Florencia. 2014. "Analyses of Intergenerational Mobility: An Interdisciplinary Review." *The ANNAL of the American Academic of Political and Social Science*. 667(1). [1 https://doi.org/10.1177/0002716214547476](https://doi.org/10.1177/0002716214547476)

advancement¹⁰. Given these purposes, there are compelling reasons to consider incorporating participatory methods into economic mobility research.

Community-Validated Research Priorities: Participatory approaches ensure that research addresses questions that matter to the communities most affected by economic mobility challenges, potentially leading to more relevant and actionable research outcomes.

Enhanced Understanding of Economic Processes: Participatory approaches can illuminate the actual processes, strategies, and decision-making patterns that drive economic mobility outcomes. While quantitative data can measure outcomes, participatory methods can help us understand how and why these outcomes have or have not changed and reveal the upward, downward, and lateral economic movements that occurred from the perspective of those navigating these transitions.

Policy Implementation Insights: Economic policies designed to promote mobility sometimes produce harmful, long-lasting effects. Participatory methods can provide insights into how policies actually interact with people's economic realities and the unintended consequences of policy that might not be captured by quantitative modeling alone.

Expanded Analytical Framework: People navigating financial hardship interact daily with multiple systems that may promote or greatly hinder economic progress. Participatory investigation of interconnected systems, including employment, housing, healthcare, childcare, and social services, can dive deeper into the interrelations between different factors and provide a nuanced understanding of how these interactions impact people's lives. While quantitative modeling and econometric approaches can analyze multiple factors simultaneously, participatory research methods can offer complementary insights into the lived experience of people navigating these systems. When combined with quantitative modeling, participatory methods can provide a more complete understanding of the mechanisms driving economic mobility.

¹⁰ Chetty, Raj, Nathaniel Hendren, Patrick Sline, and Emmanuel Saez. 2014. "Where is the land of Opportunity? The Geography of Intergenerational Mobility in the United States." *The Quarterly Journal of Economics*. 129(4): 1553–1623. <https://doi.org/10.1093/qje/qju022>

How Participatory Methods Complement Existing Economic Mobility Research Methods

Randomized Controlled Trials (RCT)

- **Participatory enhancement:** Community members help design evaluations that measure the real-world impacts of a given intervention and align with how people actually navigate their economic circumstances.
- **Added value:** Lived experience insights can improve treatment fidelity, measurement error, and reduce attrition by addressing practical barriers to participation that researchers without lived experience might not anticipate.
- **Example:** A co-designed RCT testing a financial coaching program, where community board members determine appropriate incentive structures, instrument design, and co-analysis of outcome measures.

Administrative Data Analysis

- **Participatory enhancement:** Community members co-interpret statistical patterns and identify meaningful variables or behaviors that administrative systems might not capture or precisely categorize.
- **Added value:** Understanding human experiences, informed from the vantage point of lived experience, behind data points can reveal why certain patterns emerge, suggest new analytical approaches, and help researchers avoid misinterpreting statistical relationships and associations.
- **Example:** A community research board performs co-analysis with researchers to understand that frequent address changes represent strategic housing mobility rather than instability, leading to more nuanced analysis of housing patterns and economic outcomes.

Quasi-Experimental Design

- **Participatory enhancement:** Community insights inform model assumptions about an intervention, and recognize important confounding factors that researchers with an external lens may overlook.
- **Added value:** Lived experience perspectives can explain variation in outcomes across different populations or settings and help researchers understand why similar policies produce different results in different contexts.

- **Example:** Community advisors help researchers interpret how a transportation policy change affects different neighborhoods differently based on informal transportation networks, leading to more sophisticated analysis of treatment heterogeneity.

General Equilibrium Modeling (GEM)

- **Participatory enhancement:** Community insights inform model assumptions about how people actually make economic decisions, respond to policy changes, and navigate multiple systems simultaneously.
- **Added value:** Real-world decision-making strategies can improve model accuracy by capturing behaviors and responses that standard economic assumptions might miss or oversimplify.
- **Example:** When modeling the impacts of guaranteed income, researchers engage with community members in discussions about how direct cash transfers might affect their decisions across multiple domains. Collaboration can help researchers understand the sometimes opaque and interconnected nature of household decisions and identify which behavioral responses and cross-sector effects to incorporate into the model's assumptions about labor supply, consumption, and demand across different goods, services and sectoral economic activity.

Survey Research

- **Participatory enhancement:** Community members co-design survey questions that capture relevant experience, ensure cultural appropriateness, and identify missing topics that researchers may have overlooked.
- **Added value:** Community validation of survey instruments improves data quality and ensures that surveys measure what they claim to measure from the respondent's perspective.
- **Example:** A community research advisory board co-designs income questions that capture irregular earnings, informal economic activities, and resource sharing that traditional instruments miss, resulting in more accurate economic data.

When to Consider Participatory Methods in Economic Mobility Research

Participatory methods may be particularly valuable when:

Existing research shows unexpected or limited policy outcomes, and understanding implementation realities could inform more effective approaches.

When there are questions about how economic mobility processes actually work beyond what can be observed in outcome measures.

The goal is to develop community-relevant solutions or policies that require an understanding of local contexts and priorities.

Research aims to inform policy advocacy or policy change efforts that would benefit from community partnership and validation.

Integrating Participatory and Traditional Approaches

Rather than replacing traditional economic mobility research methods, participatory approaches offer opportunities to enhance and complement existing research. The most robust understanding of economic mobility may come from combining the analytical power of large-scale quantitative analysis and modeling with powerful insights that community expertise provides.

The integration of participatory and traditional approaches might involve using participatory methods to understand the mechanisms of underlying quantitative patterns, to inform more effective policy design based on implementation realities, or to develop new measures that capture previously invisible aspects of economic mobility.

Moving Forward: From Theory to Practice

The VOICE Project demonstrates that participatory methods can generate invaluable insights for economic mobility research. However, moving from traditional research approaches to genuine collaboration with community partners requires fundamental shifts in how researchers understand expertise, power, and the research process itself.

The following chapters provide a practical framework for implementing participatory methods in economic mobility research. Chapter 2 begins with the essential first step: building a research partnership through recruitment, selection, and establishing a logistical

infrastructure for meaningful collaboration. Chapter 3 then explores the theoretical foundations of power-sharing frameworks that transform recruited participants into genuine research partners.

Chapter 2: Building Research Partnerships

Effective participatory research begins with authentic partnerships between community members and researchers. This chapter outlines the practical steps for recruiting community partners, establishing a compensation model that reflects time and expertise, and creating a logistical infrastructure for participatory research.

Recruitment and Selection

Recruiting for participatory research differs from traditional participant recruitment in its goals and criteria, with participatory research protocols identifying people with relevant lived experience *as well as* the capacity and desire to engage in collaborative knowledge production.

Community Network Recruitment Strategies

The VOICE Project used community network recruitment strategies derived from established community-based participatory research frameworks^{11, 12}. This approach combined convenience sampling with purposive sampling techniques to identify participants who met specific criteria for the research partnership.

UpTogether began recruitment through established relationships within the UpTogether network, drawing on existing trust and connection rather than cold outreach. This approach was built on the premise that effective participatory research should leverage existing relationships rather than extracting participation from disconnected groups.

Selection Criteria and Compensation Framework

¹¹ Rabinowitz, Phil. 2025. "Community-based Participatory Research." In *The Community Toolbox*. <https://ctb.ku.edu/en/table-of-contents/evaluate/evaluation/intervention-research/main>

¹² Vangeepuram, Nita, Kezhen Fei, Crispin Goytia, Devin Madden, Giselle Corbie-Smith, and Carol R. Horowitz. 2023. "Community-Based Participatory Research: Insights, Challenges, and Successes from the Perspectives of Frontline Recruiters and Investigators." *Journal of Participatory Research Methods*. 42(3). <https://doi.org/10.35844/001c.77399>

Selection criteria prioritized several key factors: participants needed to be embedded in historically undervalued communities, possess direct and recent experience navigating financial hardship, a commitment to research as a tool for change, and an express interest in collaborative work. The strategy also sought demographic diversity across regions, race, language and gender.

Critically, VOICE Board members received \$1,000 monthly during the research process. This compensation recognized the Board's intellectual expertise, removed financial barriers to participation, and established the relationship as professional partners. Compensation was not contingent on meeting attendance, ensuring that participation remained voluntary.

Logistics Infrastructure

Creating effective participatory research requires a robust logistical infrastructure that supports meaningful participation across diverse communities. The VOICE project developed several key infrastructure components that enabled authentic collaboration while addressing practical barriers to participation.

Supporting Bilingual Participation

The VOICE Project conducted all weekly meetings via Zoom with live Spanish/English interpretation to ensure that Board members could fully participate in their preferred language. Three interpreters provided simultaneous interpretation, ensuring the meeting and written translation of written comments, while maintaining the natural flow of conversation and ensuring accessibility.

The bilingual infrastructure required careful planning and resource allocation, including interpreter scheduling, technology setup for simultaneous interpretation, and translation workflows for other materials. The investment proved essential for genuine inclusion and demonstrated how careful logistical planning can enhance participatory research.

Technology Platforms and Virtual Research Accessibility

VOICE research was conducted entirely through virtual platforms, using Zoom as the primary meeting technology. Virtual participation eliminated geographic barriers, enabling Board

members from California to Maryland to participate in the research process without travel requirements.

The virtual format also reduced other participation barriers. Board members could participate from their homes, eliminating childcare and transportation challenges that might have otherwise prevented engagement. Ultimately, the virtual setting supported natural conversations by reducing institutional formality.

Documentation, Data Management, and Data Deletion Protocols

The VOICE project established transparent protocols for documentation and data management that supported both research rigor and participant agency. Weekly meetings were recorded with explicit consent. All recordings and transcripts were promptly shared with Board members to support collaborative analysis and interpretation. The project additionally established clear data retention and deletion timelines, balancing research needs with privacy realities.

Meeting Structures and Voluntary Participation

The VOICE Project structured meetings to prioritize participant agency while maintaining productive research momentum. 31 weekly meetings were held over a nine month period, with attendance and participation remaining voluntary rather than mandatory. This structure respected participants' other commitments and responsibilities while creating regular opportunities for engagement.

Meetings followed a community conversation format¹³ rather than a traditional focus group format. UpTogether researchers served as meeting facilitators, providing gentle guidance while allowing Board members to direct the conversation topics, raise new issues, and organically build on each other's insights. The purpose of community conversations is not to debate issues, but rather to listen, learn and build a shared understanding of a phenomenon.

¹³ Bates, Jessica, and Una O'Connor Bones. 2018. *A Community Conversation Toolkit*. https://www.ulster.ac.uk/_data/assets/pdf_file/0016/1201174/Bates-OConnor-Community-ConversationToolkit-2018.pdf

The meeting structures balanced consistency with flexibility. While VOICE meetings maintained a regular schedule and basic formatting, content emerged from participant interest rather than rigid predetermined agenda. This approach honored research objectives and participant agency.

Transitioning to a Collaborative Framework

With research partnerships established through thoughtful recruitment and supported by a robust logistical infrastructure, the foundation was built for implementing participatory research principles to expand knowledge of economic mobility rooted in the lived experiences. The next chapter explores the theoretical frameworks and power-sharing mechanisms that support participants to be research partners, establishing a collaborative relationship that enables participatory research.

Power-Sharing and Governance Structures

Establishing authentic research partnerships requires more than recruitment and logistical best practices. It demands deliberate structural changes to how research is governed, decisions are made, and power is distributed throughout the research process. This chapter explores how to formalize power-sharing through collaborative governance agreements and implement accountability mechanisms that prevent reversion into extractive research practices.

The Imperative for Formalized Power-Sharing

Common economic mobility research operates through implicit hierarchies where researchers retain decision-making authority over research design, data interpretation, and dissemination. Even well-intentioned researchers may unconsciously maintain these power dynamics without formal structures to redistribute authority. The VOICE Project demonstrated that meaningful collaboration requires explicit agreements that formalize shared governance and create accountability mechanisms for maintaining equitable partnerships.

Without formalized power-sharing structures, participatory research runs the risk of becoming performative, wherein community members are consulted, but researchers maintain control over decisions. This represents a fundamental distinction: **participatory research cannot exist without genuine power-sharing.**

While common economic research methods can incorporate community input or feedback, participatory research requires researchers to relinquish control over key decisions and share authority throughout the research process.

Traditional vs. Participatory Decision-Making

The table below illustrates how decision-making authority differs between traditional and participatory research approaches across key research activities:

Research Decision	Traditional Research	Participatory Research
Setting Research Agenda	Researchers determine questions based on academic priorities or policy interests	Community advisory board identifies priority questions based on lived experience and/or community needs
Designing Research Methods	Researchers select methodologies based on disciplinary expectations	Co-design process where community members and researchers collaborate to develop an appropriate methodological approach(es)
Creating Data Collection Instruments	Researchers design surveys, interview guides, and protocols	Community members review, revise, and validate instruments to ensure relevance and accessibility
Recruiting Participants	Researchers recruit through institutional channels	Community board members co-design recruitment strategies and may lead outreach efforts
Conducting Data Collection	Trained researchers or	Community members serve

	research assistants collect data	as co-researchers, conducting interviews or facilitating focus groups
Analyzing Data	Researchers analyze and interpret data using predetermined frameworks	Community advisory board engages in data interpretation and meaning-making processes
Interpreting Findings	Researchers draw conclusions based on academic frameworks and literature	Community members serve as the interpretive authorities, providing context and validating findings
Disseminating Results	Researchers control publication timeline, venues, and messaging	Community members and researchers collaborate in dissemination strategies, messaging, and may co-author publications
Using Findings for Action	Researchers may recommend policy implications; implementation is separate	Community members help determine how findings should be used and may lead implementation efforts

Development of Governance Agreements

The development of governance agreements should involve meaningful input from community partners, although the process may begin with researcher-drafted frameworks. In the VOICE Project, UpTogether researchers initially drafted the project's governance agreement, or Memorandum of Understanding (MOU) (See Appendix A), which VOICE Board members then revised, edited, and refined before any research activities commenced. This collaborative revision process served multiple purposes, including building trust by demonstrating a commitment to shared governance from the outset; creating co-ownership and developing an investment in project success; and identifying potential conflicts, creating the opportunity to surface areas of disagreement before they become problematic.

Regular Partnership Reviews

Sustainable power sharing requires ongoing monitoring and adjustment. The VOICE project implemented monthly partnership reviews to assess adherence to MOU commitments and allow for process adjustments. These reviews serve several functions: proactive problem solving, continuous improvement that allows partners to refine processes based on what is working and what isn't, relationship maintenance through structured conversations about the partnership itself that strengthen collaborative relationships, and accountability by creating opportunities to address when agreed-upon power-sharing practices aren't being followed.

Chapter 3: Qualitative Research and Community-Led Analysis

The development of a community-informed research agenda on economic mobility requires systematic approaches that honor qualitative methodological rigor and community expertise. This chapter outlines the VOICE Project's methodology for collaborative knowledge creation, demonstrating how participatory research can generate robust findings while maintaining community ownership of the interpretive process.

Trauma-Informed Practices and Liberatory Research Praxis

From the outset, participatory practice in the VOICE Project was intentionally grounded in trauma-informed and liberatory research approaches.

Trauma-informed¹⁴ practice recognizes that trauma is not an isolated event in people's lives, but a central element shaping how individuals experience and interpret the world around them¹⁵. By understanding trauma's pervasive impact, researchers can create impacts where study environments that avoid retraumatizing participants and instead foster safety, trustworthiness, choice, collaboration, and empowerment¹⁶. Originally described in clinical contexts, trauma-informed approaches in research align closely with the ethical beneficence or the responsibility of researchers to minimize harm. Within trauma-informed research practice, this includes avoiding the retraumatization of participants during all phases of the research cycle while effectively leveraging research as a tool for healing and community power building.

Equally important to the VOICE Project was the integration of liberatory research praxis¹⁷. Liberatory research challenges Western paradigms that treat positivism as the highest

¹⁴ Harris, Maxine, and Rodger D. Fallot, 2001. *Using Trauma Theory to Design Service Systems*. San Francisco: Jossey-Bass/Wiley.

¹⁵ Harris, Maxine, and Roger D. Fallot. 2006. "Envisioning a Trauma-Informed Service System: A Vital Paradigm Shift." *New Directions for Mental Health Services*. 89:3-22. <https://doi.org/10.1002/ym.23320018903>

¹⁶ Fallot, Roger D., and Maxine Harris. 2011. *Creating Cultures of Trauma-Informed Care (CCTIC): A Self-Assessment and Planning Protocol*. Washington, DC: Community Connections.

¹⁷ Liberatory Research, "About," *Liberatory Research*, accessed September 26, 2025, <https://www.liberatoryresearch.com/about>.

standard of rigor, and the researcher as the sole-authority of scientific exploration. It critiques research practices that extract knowledge from marginalized people while excluding their narratives from academia. Liberatory research praxis argues that the power held by researchers and the exclusion of methods outside of Eurocentric practices fosters epistemicide, or the destruction and devaluation of knowledge systems. However, researchers and standards can shift their practice and reduce harm by acknowledging that power dynamics are present in the research process, and that lived experience and communal knowledge are as rigorous as the empirical. Liberatory research encourages social scientists to move away from the stance of detached expertise and instead step into an identity that emphasizes bearing witness with care and centering communities as the experts, learning with intention from their lived experiences and collective wisdom¹⁸.

As such, UpTogether staff actively embraced the back seat. Guided by the MOU, the UpTogether research team engaged the VOICE Board as collaborators in both learning and research design. This approach minimized the extractive tendencies of Westernized research, which too often re-traumatizes (and at times creates new traumas) the communities involved, especially when exploring sensitive topics such as racism, systemic and cyclical poverty, illness, and other traumas that shape the lived realities of economic mobility and historically undervalued people.

Community Conversations as Data Collection

The foundation of the VOICE Project's qualitative methodology centered on weekly conversations, over nine months, between the VOICE Board and UpTogether research staff. Community conversations represent a deliberate departure from traditional focus group methodologies, operating instead as semi-structured dialogues that use a scant list of guided questions to prompt discussion while preserving participant agency in directing the conversation about lived experiences of financial hardship and economic mobility.

Community conversations differ from focus groups in several fundamental ways. They emphasize participant agency in determining the depth of topics discussed, prioritize relationship building among participants and researchers, and operate on the principles of shared power where facilitators guide rather than control conversation flow. The

¹⁸ Tau, Zuri. 2022. "Evaluation 2022 Equity Working Group Week: Exploring Liberatory Practice—What if We're Wrong?" AEA365, November 1, 2022, <https://aea365.org/blog/evaluation-2022-equity-working-group-week-exploring-liberatory-practice-what-if-were-wrong-by-dr-zuri-tau/>

community conversation approach recognizes that meaningful insights emerge through sustained dialogue rather than one-time data collection events.

Iterative Analysis and Community Validation

The VOICE Project implemented a weekly cycle of analysis and validation that maintained community authority over interpretation while building analytical depth. Following each community conversation, UpTogether researchers conducted qualitative analysis on meeting transcripts and audio recordings using Grounded Theory methodology¹⁹, an inductive approach that builds on insights from data without predetermined hypotheses.

Following standard grounded theory protocols, which entailed multiple readings and listening sessions of transcripts and recordings to achieve data immersion. This was followed by open coding to identify initial concepts and themes, then axial coding to identify relationships among emergent themes and concepts within community conversations. The systematic approach ensured that patterns and insights emerged from the data itself rather than being imposed by external theoretical frameworks.

The participatory validation process distinguished the VOICE Project methodology from common qualitative research approaches. Each week, preliminary findings from the previous conversations were presented to the VOICE Board during the following meeting. UpTogether researchers would share their interpretations by explaining to the VOICE Board “this is what we heard, this is how we interpreted it,” and solicited Board feedback on the accuracy of interpretations.

Board members evaluated whether the researchers’ interpretations accurately reflected their intended meanings and provided corrections, clarifications, and additional context as needed. When Board members indicated that the researchers’ interpretations missed important nuances or imposed unintended meanings, the analysis was revised to reflect community corrections.

From Themes to Research Priorities

¹⁹ Charmaz, Kathy. 2006. *Constructing Grounded Theory: A Practical Guide Through Qualitative Research*. Sage: London.

The recursive methodology of weekly conversations, analysis, and validation enabled research priorities to emerge organically from community expertise while maintaining analytical rigor. The themes that consistently emerged across community conversations were synthesized into research priorities that reflected both the frequency of discussion and the emphasis that Board members placed on particular topics.

The iterative process allowed for themes to be refined and deepened over time. Initial conversations might introduce a concept that gained clarity and specificity through subsequent discussions and community validation. This approach ensured that the final research agenda represented not just topics of interest but priorities that had been thoroughly explored and validated by community partners.

Creating a Research Agenda through Community Conversations in the VOICE Project

The VOICE Project employed a two-step process to create a research agenda grounded in the lived experience of people who have experienced financial hardship and navigated economic transitions: theory and validation. In the theory formation step, key research priorities emerged organically from the Board's expertise and experiences through sustained community dialogue, with researcher-generated qualitative findings validated through ongoing feedback with the VOICE Board.

The initial community conversations with the VOICE Board focused on developing a shared definition of economic mobility. UpTogether researchers brought a working definition of economic mobility, which Board members revised and refined to ensure that it resonated with their lived experiences²⁰. From these foundational discussions, themes began to emerge that reflected the priorities, challenges, and insights that Board members brought from their experiences navigating economic transitions. Each subsequent conversation built

²⁰ *Economic mobility refers to the dynamic and multidirectional ways that individuals, families, and communities experience changes in their economic circumstances over time. It is not solely an upward trajectory but includes periods of advancement, decline, and stasis. Mobility unfolds through nonlinear paths shaped by a combination of emotional well-being, social networks, and collective movement.*

Panoramic economic mobility is a framework for investigating the full spectrum of how people navigate economic mobility across time. It diverges from traditional models grounded in assumptions of linear, continuous growth, offering a framework to investigate upward mobility, downward shifts, and periods of stasis—times of little or no movement that may be imposed by systemic barriers or intentionally chosen for rest, care, and reorientation. Panoramic economic mobility makes visible lateral movements, collective forms of progress, and the role of social, emotional, and structural factors in shaping mobility.

iteratively on previous insights, with community conversation topics determined through analysis of the preceding week's discussion.

The second step of the process involved validating the research agenda with a broader group of communities facing financial hardship. After identifying community priorities for economic mobility research, these priorities were then investigated through a nationally representative survey co-designed with the VOICE Board.

Methodological Contributions

The VOICE Project's qualitative methodology demonstrates how participatory research can maintain analytical rigor, while redistributing interpretive authority. The weekly cycle of conversation, analysis, and validation created a systematic approach to collaborative knowledge creation that honored both community expertise and qualitative research best practices.

This approach addresses a common challenge in participatory research: how to balance community ownership with analytical depth. The sustained engagement in weekly community conversations allowed themes to be thoroughly validated across multiple conversations and refined through ongoing community input. The resulting research agenda represented genuine community priorities that had been developed and systematically validated through collaborative analysis, creating a replicable model for rigorous participatory research in economic mobility studies.

Chapter 4: Survey Design and Collaborative Quantitative Analysis

Building on the research priorities identified through community conversations, the VOICE Project demonstrated how participatory principles can enhance quantitative research methods. This chapter explores the collaborative process for survey design, implementation, and analysis that maintained community authority over interpretation while leveraging statistical analysis to investigate research priorities with a larger population.

From Qualitative Insights to Survey Design

At the conclusion of the theory formation phase, the VOICE Board and UpTogether researchers developed a research agenda of priorities for studies about economic mobility in the United States. Acknowledging that qualitative insights from community conversations with 15 participants could not fully capture the range of economic mobility experience across diverse US populations, the validation phase was designed to expand understanding of these research priorities through additional data collection from a nationally representative population.

The Board and UpTogether researchers collaboratively designed the validation approach, which centered on a case study methodology focusing on the COVID-19 pandemic. Throughout the community conversations, the pandemic frequently emerged in discussions of how economic mobility is impacted by external forces and influenced by systems and community networks.

Collaborative Survey Development

The survey development process exemplified participatory research principles through a structured collaboration that positioned the VOICE Board as essential partners in translating community-identified research priorities into quantitative measures. UpTogether researchers initially drafted the survey instrument based on the key research priorities that emerged from the community conversations. The VOICE Board then conducted

comprehensive reviews of the draft survey, making revisions to language, response options, and question framing while adding some entirely new questions that the research team had not considered.

This collaborative revision process proved critical to the survey's effectiveness. Board members identified when proposed questions used language that would be unclear or inaccessible to the sample population. They revised response options to better capture the range of experiences that respondents might have, ensuring that survey categories reflected real-world situations rather than researcher assumptions about how experiences should be categorized.

The Board also contributed substantive additions to the survey content. Drawing from their lived experience navigating financial hardship and economic transitions, Board members identified important aspects of economic mobility that the initial survey draft had not adequately addressed. These additions ensured that the survey captured the full scope of research priorities that had emerged from community conversations rather than only the elements that researchers had translated into survey format.

The collaborative design process ensured that survey questions reflected the language, concepts, and priorities that had emerged from community conversations rather than imposing external theoretical frameworks. The Board's authority over survey content meant that the final instrument could meaningfully capture the experiences the Board had identified as research priorities while remaining accessible to respondents with similar lived experiences.

Case Study Implementation in the VOICE Project

The survey was deployed through the UpTogether Connect platform, a network of people who have experienced financial hardship or economic transitions. To reach a nationally representative sample, we drew from a total population of 110,000 UpTogether members who had provided demographic data to UpTogether through their member profile on the UpTogether Connect platform and/or through a verification form for an UpTogether fund. A sampling quota methodology ensured that the final dataset was representative of the US population in terms of race, gender, age, and region. The survey was distributed in several waves to a total sample size of 1,000 respondents, with each subsequent wave adjusted based on response rate to maintain national representativeness.

Survey respondents were compensated \$50 for completing the 20-30 minute survey. Compensation is an ethical necessity to honor the expertise and time that the survey requires from respondents, in addition to the emotional weight of survey questions referencing a time of uncertainty, hardship, and grief. The amount of compensation was selected to be meaningful for respondents, while also not being coercive. As surveys take not only time from respondents, but also reflection and emotional intensity, it is important that respondents feel empowered to choose to step away from the survey at any time.

Participatory Data Analysis Through Data Walks

The analysis phase of the quantitative research demonstrated how participatory methods can enhance statistical analysis by incorporating community expertise in data interpretation. UpTogether researchers conducted initial statistical analysis of survey responses, then brought these findings back to the VOICE Board through a process called “data walks”²¹ in weekly meetings.

Data walks represented a collaborative approach to quantitative analysis where researchers presented statistical findings and Board members provided guidance on interpretation. Rather than researchers independently drawing conclusions from statistical patterns, the Board served as interpretive authorities who could explain what the numbers meant from the perspective of lived experience. This process ensured that quantitative findings were understood within the context of the community expertise that had generated the original research priorities.

The Board also provided recommendations on which findings warranted deeper statistical analysis. When preliminary results revealed patterns that resonated with their deeper experiences or raised new questions, Board members directed researchers to conduct additional analysis to explore these areas more thoroughly. This collaborative approach ensured that statistical analysis served community-identified priorities rather than researcher assumptions about what was most important.

²¹ Murray, Brittany, Elsa Falkenburger, and Priya Saxena. 2015. “Data Walks: An Innovative Way to Share Data with Communities.” *The Urban Institute*. November.
<https://www.liprc.org/wp-content/uploads/2023/08/2000510-data-walks-an-innovative-way-to-share-data-with-communities.pdf>

Methodological Innovations in Participatory Quantitative Research

The VOICE Project's approach to quantitative analysis demonstrates several methodological innovations for incorporating participatory principles into statistical research. The use of data walks created a systematic approach for maintaining community authority over interpretation while leveraging the technical expertise of trained researchers. The process prevented the challenge of community members being excluded from quantitative analysis due to technical barriers.

The collaborative approach also enhanced the quality of quantitative interpretation by incorporating contextual expertise that researchers alone could not provide. Board members could identify when statistical patterns aligned with or contradicted their lived experiences, providing crucial validation or correction of the researcher's interpretation.

Balancing Rigor with Participation

The survey design and analysis process illustrates how participatory methods can enhance rather than compromise quantitative research rigor. By incorporating community expertise in survey design, the research ensured that quantitative measures captured relevant concepts from the perspectives of people with lived experience. The collaborative analysis process added interpretive depth that researcher-led statistical analysis could not provide, all while maintaining methodological standards of interpretation.

Chapter 5: Innovation and Knowledge Creation

The VOICE Project demonstrated that participatory research can reveal new dimensions of economic mobility. This chapter explores the unique insights that emerged from centering people with lived experience as research partners and demonstrates how these discoveries can enhance our collective understanding of economic mobility processes.

New Landscapes, Concepts of Economic Mobility Frameworks

The VOICE Project generated several conceptual innovations that emerged directly from community expertise and provided valuable additions to existing economic mobility frameworks. These concepts demonstrate how participatory methods can expand the analytical toolkit available to researchers and build upon established research foundations.

Panoramic Economic Mobility Integrating Multiple Dimensions

The VOICE research agenda's call for investigation of panoramic economic mobility emerged from participatory research that revealed the need for a more holistic view of how people actually experience economic transitions. While economic mobility research already examines individual, social, and structural forces that shape mobility outcomes, the VOICE Project's community-centered approach highlighted how these different dimensions interact simultaneously in people's lives and should be analyzed together, rather than isolated as separate influences.

Economic mobility scholars have developed sophisticated methods for studying individual factors, structural barriers, social networks, and policy impacts on mobility outcomes. The panoramic framework that emerged from the VOICE Board's expertise suggests that researchers could enhance this work by examining how people, across their lifetimes, navigate multiple systems and influences concurrently.

The VOICE Board's lived experience revealed that mobility involves simultaneous navigation of employment, benefit, and healthcare systems, all while maintaining the emotional and psychological dimensions of economic transitions. This holistic perspective has the potential to complement existing research by suggesting how findings from different

analytical approaches might be integrated to better reflect the multidimensional reality of mobility experiences.

Economic Pause: Understanding Stability as a Critical Mobility Component

One of the most significant conceptual contributions from the VOICE Project is the identification of economic pause as a distinct component of mobility journeys that adds crucial depth to common measures of upward and downward economic movement. Dominant economic mobility research effectively captures changes in income, employment status, and asset accumulation over time through sophisticated quantitative methods and large-scale datasets. The concept of economic pause provides essential context for interpreting these measurements by revealing what happens during periods of apparent stagnation.

The VOICE Board distinguished between positive and negative forms of pause, each with different implications for mobility trajectories. **Voluntary pauses** represent chosen moments of rest, reflection, and strategic planning that allow people who have experienced financial hardship. The pauses provide essential time to recover from the stress of experiencing financial hardship and can serve as launching points for future mobility.

Forced pauses, by contrast, are imposed by structural barriers, like glass ceilings, policy restrictions, or systematic exclusion that halt progress without slipping into downward mobility. 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 accessing the next level of opportunity.

The distinction provides interpretive depth that may enhance more common modes of economic mobility research. For example, when administrative data show periods of stable income or loss of employment accompanied by stagnancy, the pause framework offers a way to understand whether or not these periods represent strategic positioning, harmful stagnation, or restorative recovery. These insights have the potential to enhance more traditional models of economic mobility by suggesting additional variables and interpretive lenses that can strengthen research design and analytical investigation.

Beyond Upward Mobility: The Importance of Studying Downward Movement

The VOICE Project's emphasis on studying downward mobility alongside upward movement provides an important divergence from the tendency to focus primarily on pathways to economic advancement. While understanding upward mobility remains critical, the VOICE Board's insights about downward mobility illuminate important dynamics that can enhance our overall understanding of mobility processes.

Board members emphasized that downward mobility often results from systematic barriers, unexpected crises, or policy failure that create setbacks, rather than individual shortcomings. This perspective enriches traditional research by highlighting how external shocks, policy implementation failures, and structural barriers can trigger mobility reversals.

Shining a spotlight on downward mobility also shows that upward and downward movement are interconnected rather than separate phenomena. Traditional research approaches might study factors that promote upward mobility and factors that cause downward mobility as distinct research questions. The VOICE Project's panoramic approach suggests that understanding conditions that prevent downward mobility is essential for promoting sustainable upward movement.

This insight strengthens existing research by demonstrating that effective mobility policies must address opportunity creation and risk mitigation. Rather than focusing solely on programs that promote advancement, the VOICE findings indicate the importance of examining how policies can provide stability and prevent the kinds of cascading crises that lead to rapid downward mobility.

The Grace Economy: Structural Conditions for Restorative Pause

Central to the VOICE Project's theoretical framework is the Grace Economy, defined as a formal and informal system that governs how time, resources, and rest are made accessible, withheld, or distributed. The Grace Economy shapes who can pause without penalty, who has the resources to plan and pivot when faced with financial uncertainty, and how recovery is managed in times of economic strain. Unlike traditional economies that manage the

production and exchange of goods, the Grace Economy manages a person's ability to regroup and act with intention when experiencing financial strain.

This framework provides a unifying lens that connects individual mobility experience to broader structural analyses that characterize much economic mobility research. While traditional modes of research effectively document how public policy, workplace conditions, and social networks influence mobility outcomes, the Grace Economy integrates these elements into a cohesive framework that explains how their interactions create conditions for different types of pause.

The Grace Economy encompasses public benefits, workplace and caregiving flexibility, sociocultural acceptance for voluntary pauses for rest and reflection, and networks of collective care and reciprocity. This framework builds upon established research on social capital, public benefit utilization, and workplace policies by proposing that all these factors work in tandem during upward and downward economic movement by either enabling or restricting access to restorative pause.

Access to the Grace Economy is shaped by structural privileges and systematic barriers. Civil society and public policy can act as conduits or gatekeepers to upward economic mobility, determining whether people are afforded the support needed to move from survival towards self-determined financial progress. The Grace Economy supports wealth building by providing people with access to supportive resources and the time needed to strategically plan their next steps in economic mobility trajectories. At its core, the Grace Economy holistically supports upward mobility without deservedness barriers²², allowing those in need of structural support to pursue financial stability with dignity.

The Grace Economy can essentially be operationalized by people's access to rest, reflection, and planning without penalty. This framework provides a theoretical bridge between individual-level mobility experiences and the structural factors that dominant research approaches sometimes identify as mobility determinants. Yet, rather than replacing existing analytical frameworks, it offers a way to synthesize findings from different research traditions – from policy analysis to social network research to labor economies – into a more comprehensive understanding of how mobility processes actually work.

²² Kast, Emma J. 2025. "Disrupting the Production Boundary: From Deservingness to Right." *New Political Economy*. 5: 729-740. <https://doi.org/10.1080/13563467.2025.2487447>

This framework also extends to transitional policy research by highlighting how seemingly separate policy domains interact and shape mobility outcomes. While common approaches to economic research may study housing policy, healthcare access, or workplace regulation as distinct areas, the Grace Economy Framework shows how these policies work together to either enable or restrict kinds of restorative pause that facilitate sustainable mobility.

The concept demonstrates that access to voluntary pause is structurally determined rather than individually chosen, with the Grace Economy governing whether stability periods serve as bridges to mobility barriers or maintain existing inequalities. This insight enriches traditional economic mobility research by suggesting new variables and providing interpretive frameworks for understanding policy interactions.

Collaborative Survey Development: Co-Creating Research Instruments

The VOICE Project's approach to survey development demonstrates how participatory methods can enhance quantitative research by ensuring that instruments capture community-identified priorities and reveal insights that researchers might otherwise miss.

The VOICE's survey development process began with UpTogether researchers drafting initial survey questions for the COVID-19 case study, which were based on research priorities that had emerged during the community conversations. The VOICE Board then conducted a comprehensive review of the draft survey, making revisions to language, response options, and question framing while adding entirely new questions that researchers had not considered. This collaborative revision process proved essential to the survey's ability to capture meaningful data about economic mobility experiences.

The Board's contributions went beyond language refinement to include substantive additions that fundamentally shaped the research findings. Drawing from their expertise in navigating economic transitions, Board members identified important aspects of economic mobility that the initial survey draft had not adequately addressed: the experience of primary breadwinners who lost work during the pandemic.

Initially, UpTogether researchers hesitated to include questions about primary breadwinners who left the workforce or reduced hours during the height of the pandemic in 2020, concerned that operationalizing “primary breadwinner” would be methodologically challenging, particularly in multi-income households where financial contributions and family roles are complex and challenging to measure. Additionally, the retrospective design raised concerns about recall accuracy. However, the VOICE Board pushed back on the UpTogether researchers' assumptions, arguing that this measure was critical to understanding economic mobility patterns during the pandemic.

Working collaboratively, the VOICE Board and UpTogether researchers addressed the operationalization challenges and retrospective measurement concerns by refining the survey instrument design to develop clear, measurable definitions of primary breadwinner status. The Board's expertise in navigating caregiving responsibilities and employment disruptions caused by external shocks informed the development of response categories and question wording that could accurately capture household economic dynamics from that period without creating ambiguity in measurement or excessive recall burden.

The collaborative development of the survey instrument led to findings that directly validated key priorities from the VOICE research agenda, revealing the widespread nature of forced pause. The survey population showed that among 691 respondents who were experiencing financial hardship and working before the pandemic, 85% lost, quit a job or were forced to reduce hours during 2020 shutdowns. 73% of this population had to leave the work force or cut hours for caregiving responsibilities. Among the caregivers who left work or reduced hours, 88% had been their household's primary breadwinners before COVID-19.

The demographic patterns revealed stark intersectional inequities. Of the 236 primary breadwinners who left work for caregiving, 75% were women, 80% were Black or African American, and Black and African American women aged 26-34 represented 44% of all primary breadwinner-caregivers who were forced from the workplace, a concentration 3.14 times higher than would be expected if all other demographic patterns were independent.

Research Agenda Made Visible

The findings directly validated the VOICE research agenda's emphasis on forced pause. The data revealed how the absence of adequate childcare and family supports creates a forced pause, with nearly 73% of all working caregivers compelled to step away from employment.

Unlike voluntary pauses that allow for strategic planning and recovery, these workforce departures represented structural barriers that halted economic progress for primary earners.

The scale of disruptions, affecting three-quarters of all working survey respondents, demonstrated how external shocks can create system-wide forced pauses that extend far beyond economic circumstances. These findings also validated the Board's emphasis on studying downward mobility alongside pause and upward mobility. Data shows how unexpected crises can trigger rapid economic reversals, particularly in the absence of supportive infrastructure.

The intersectional patterns confirmed key insights about how structural inequities, including racism and sexism, shape mobility patterns and who is most often constrained by circumstances beyond individual control. The disproportionate impact on Black women in their prime working years (26-34) demonstrated how the absence of supportive systems creates cascading economic effects for communities already facing structural barriers that inhibit upward mobility, validating the Board's insights about the multidimensional nature of economic mobility.

Project Limitations

While the VOICE Project successfully demonstrated the potential of participatory economic research, several limitations shaped its scope and implementation. The project would have benefited from 1.5 times its allocated timeframe. Although community conversations were conducted with live interpretation, time constraints prevented translation of all project materials into Spanish, creating barriers from Spanish-speaking participants and reducing the project's accessibility.

Additional time would have also allowed for survey piloting before deployment, and could have strengthened the instrument, addressed measurement issues, and further refined questions and response choice wording. These limitations highlight the importance of resource allocation for participatory research, particularly when supporting multilingual participation and iterative design processes.

Future Research Directions

The conceptual innovations from the VOICE Project point to several areas of future investigation. Researchers might explore how the Grace Economy operates across different policy contexts, examining the conditions that enable voluntary versus forced pause, or investigate how panoramic approaches to mobility research can be operationalized in future studies. The participatory methodology itself offers a framework for generating additional community-driven research priorities that could further expand the field's understanding of economic mobility.

Chapter 6: Conclusion – An Invitation to the Field

The VOICE Project demonstrates that participatory research methods can fundamentally enhance economic mobility research by revealing insights that traditional approaches alone may not capture. Through nine months of sustained collaboration, the VOICE Board and UpTogether researchers co-developed innovative conceptual frameworks, from the concept of economic pause to panoramic mobility, to the Grace Economy, that provide new analytical tools to understand how people navigate complex economic systems.

The VOICE Board and UpTogether researchers developed this guidebook with the explicit hope that academic institutions, advocacy organizations, and NGOs will adapt and implement these participatory methods in their own work. The frameworks and methodologies outlined here are not proprietary innovations but rather contributions to the collective effort to understand and address economic inequality.

The participatory approach offers particular value for people and organizations who are seeking to:

Bridge Research and Advocacy: Academic researchers can use these methods to ensure that their work addresses community-identified priorities, while advocacy organizations can leverage participatory research to strengthen evidence-based policy recommendations with lived experience insights.

Enhance Policy Effectiveness: NGOs and policy organizations can apply the Grace Economy framework to analyze how different policy domains interact, moving beyond siloed approaches to develop more comprehensive solutions that address the interconnected challenges that people face.

Improve Program Design: Direct service organizations can use community conversation methodologies to design programs with participants rather than for them, ensuring interventions align with the actual needs and priorities of the communities they serve.

Strengthen Community Engagement: All organizations can apply the power-sharing and governance structures demonstrated in the VOICE Project to move beyond consultation toward genuine partnership with community members.

Replicating and Adapting the Methodology

The VOICE Project methodology is designed to be adapted rather than to be replicated exactly. Different contexts will require modifications to recruitment strategies, compensation structures, meeting formats, and analytical approaches. The essential elements, including **genuine power-sharing, community authority over interpretation, and sustained collaboration**, can be implemented across diverse settings and research questions.

Organizations implementing participatory methods should expect an initial investment in relationship building and infrastructure development. The logistical requirements for meaningful participation, from interpretation services to technology platforms to fair compensation, represent real costs that must be planned for from the outset. However, the enhanced relevance and community validation of the resulting research will justify these investments.

Expanding the Conversation

The conceptual innovations that emerged from the VOICE Project, particularly the Grace Economy Framework, invite further investigation across different contexts and populations. Academic researchers might explore how access to restorative pauses varies across geographic regions, policy environments, or demographic groups. Advocacy organizations could use the forced versus voluntary pause distinction to analyze the differential impacts of policy proposals on various communities.

The participatory methodology itself offers opportunities for continued development. Future implementations might explore how to scale community involvement in larger studies, how to maintain community authority in longitudinal research, or how to use participatory approaches in policy evaluation and program assessment.

An Invitation for Structural Change

Ultimately, the VOICE Project calls on economic mobility researchers to move beyond studying people experiencing financial hardship to partnering with them as intellectual equals and research authorities. For example, rather than asking “how do multiple stressors on mothers experiencing financial hardship impact parenting?” researchers might partner with mothers to explore “what strategies have parents facing financial hardship developed to support families within constrained systems, and what do these experiences reveal about the need for structural changes in childcare, housing, and employment policies?” However, such a shift in approach requires more than methodological adjustments – it demands fundamental changes to how institutions understand expertise, allocate resources, and share decision-making authority.

The VOICE Board and UpTogether researchers offer up this guidebook as a practical resource and call to action. The question is whether researchers and organizations will commit to the structural changes necessary to implement them authentically. This invitation extends beyond individual projects to institutional transformation. Universities, research organizations, and funding bodies can use the VOICE Project as a model for reimagining how knowledge is created, validated, and disseminated.

The many Americans experiencing financial hardship whom economic mobility research seeks to understand are ready to be partners in that understanding. Communities are ready to partner. Here’s how the field can say yes, and start today.

Appendix A: Memorandum of Understanding

Memorandum of Understanding

Between

VOICE Board Members

and

UpTogether Research Agenda Team

Section 1: Overview of MOU, Background, and Purpose

This Memorandum of Understanding (MOU) establishes the terms of agreement between the Valuing Our Insights and Community Expertise (VOICE) Research Advisory Board and UpTogether Research Agenda Team researchers to co-develop a research agenda. The agenda aims to explore the experiences and barriers to economic mobility faced by individuals with firsthand experience of financial hardship in the United States.

Background

The VOICE Board and UpTogether Research Agenda Team are committed to developing a participatory research agenda that prioritizes the lived experiences, expertise, and agency of individuals with firsthand experience of economic hardship.

Traditional research often extracts knowledge from communities without fully integrating their voices in the research process or acknowledging their contributions as co-creators of knowledge. This partnership seeks to shift power dynamics in

research by ensuring that individuals with lived experience actively shape a research agenda that informs future policy related to economic mobility in the United States.

Purpose

The purpose of this MOU is to formalize the collaboration between the VOICE Board and UpTogether Research Agenda Team in co-developing and validating a participatory-centered research agenda focused on economic mobility, as it is defined or relates to those impacted by financial hardship.

This partnership is rooted in equity, inclusion, and shared decision-making, ensuring that research processes and outcomes are meaningful, actionable, and aligned with the realities of those most impacted by economic policies and programs.

Through this MOU, VOICE and UpTogether Research Agenda Team aim to:

1. **Co-develop a participatory-based research agenda** about economic mobility informed by the lived experiences of individuals familiar with financial hardship.
2. **Engage in co-creation and participatory research** by ensuring VOICE Board members have decision-making power in defining research priorities, refining and understanding the parameters of research, methodologies, and the interpretation of findings.
3. **Advance ethical and people-first research practices** that center on participant voices, challenge extractive research models, and promote shared ownership of knowledge.
4. **Ensure accessibility and equity in research participation** by addressing barriers to engagement, including compensation, time considerations, and support mechanisms.

Section 2: Scope of Activities

These goals will be achieved through the following activities:

Research Co-Design and Agenda Setting

VOICE Board members will participate in the co-design of the research agenda with the UpTogether Research Agenda team, ensuring that key research questions reflect

the priorities and realities of the VOICE Board and others who have experienced systemic financial hardship.

UpTogether staff will provide technical research support, facilitation, and administrative coordination to translate these insights into a structured research agenda.

To ensure the research agenda broadly and accurately reflects the lived experience of individuals navigating economic mobility in the US, the VOICE Board and UpTogether Research Agenda Team will collaboratively determine how to validate and refine the research agenda.

Section 3: Principles of Collaboration, Equity and Power-Sharing

The VOICE Board will play a pivotal role in shaping the research agenda through discussions in weekly meetings. Within these weekly meetings:

- The UpTogether Research Agenda Team will facilitate discussions to support the Board in reassessing and refining questions and research approaches to understand economic mobility in the United States.
- VOICE Board members will lead the identification and refinement of key research priorities, ensuring that questions and research approaches reflect lived experiences.
- The Board will collaborate on the co-design of research tools, such as survey instruments, interview guides, or focus group structures, with the UpTogether Research Agenda Team providing research expertise and logistical support.

Participatory Data Analysis and Validation

- VOICE Board members will engage in participatory data analysis to review findings, identify key themes, and re-evaluate and/or validate interpretations.
- UpTogether Research Agenda Team will synthesize data and co-develop research outputs in collaboration with VOICE Board members.

Dissemination and Advocacy

- VOICE Board members and UpTogether Research Agenda Team will collaborate to ensure research findings are disseminated in accessible, community-informed formats, including public reports, presentations, and digital media.

Dignity and Respect

- All members of this partnership will engage with one another in ways that uphold the inherent dignity, knowledge, expertise, and lived experience of VOICE Board members.
- We commit to open, honest, and respectful communication, ensuring that all contributions are valued equally.

Anti-Racist and Equity-Centered Research

- The UpTogether Research Agenda Team recognizes that traditional research often upholds systemic inequities, especially when it comes to research with historically undervalued groups and people. The UpTogether Research Agenda Team project is committed to anti-racist research principles, ensuring that people with lived experience are not subjects but co-creators of knowledge.
- UpTogether Research Agenda Team will actively work to deconstruct traditional research hierarchies and center the voices of the VOICE Board in all aspects of the research process.

Conflict Resolution & Power Accountability

If any VOICE Board member identifies power imbalances, exclusion, or inequitable treatment, the following steps will be taken:

- **Conflicts between VOICE Board members and the UpTogether Research Agenda Team:** A structured discussion will be held between designated VOICE representatives and the UpTogether Research Agenda Team to address

concerns. The VOICE Board and UpTogether Research Agenda Team will determine a facilitator for this conversation.

- **Conflicts within the VOICE Board:** Voice Board members will address internal disagreements using a conflict resolution process agreed on by the VOICE Board members. UpTogether will not intervene in internal VOICE matters unless necessitated and/or explicitly requested by Board members and agreed upon by all parties.

Addressing Power Dynamics and Upholding Accountability

- UpTogether acknowledges its position as a funded organization and is committed to transparency, share-decision making, and equitable participation.
- Weekly check-ins between the VOICE Board and UpTogether Research Agenda Team will be used to proactively surface and address concerns related to power dynamics and to ensure accountability.

Commitment to Shared Learning & Collective Growth

- By signing this agreement, all partners agree that this work is a shared journey of learning and that feedback, adaptation, and mutual accountability are key to maintaining the integrity of this collaboration.
- We recognize that the goal of this partnership is not only to produce research but to model liberatory and equitable research practices that empower communities beyond this project.

Collaboration with Interpreters and Translators

- To affirm our commitment to shared learning and UpTogether's mandate as an anti-racist organization, the community conversation sessions will provide interpretation and translation services to support the diverse linguistic abilities and preferences of the VOICE Board.
- Interpretation and translation of all documentation will be provided in English and Spanish to support Board member participation and engagement.
- To support interpreters, all participants of the community conversations will

- Speak one at a time
- Pause briefly between speakers
- Uptoegether staff will facilitate the flow of communication to support interpreters.
- We honor that all Board members have different access to wi-fi and mobile services, and that audio across these services may be limited.
- To support limitations in audio, community conversation partnerships will:
 - Use the chat to communicate thoughts and ideas
 - Speak as loudly and clearly as their environment allows.
 - Use headphones or earbuds if they are available.
- We acknowledge that camera use during the community conversations is optional
- If comfortable, community conversation participants will turn their cameras on while speaking to support interpretation and translation efforts.

Section 4: Confidentiality and Data Handling

- **Recording of Meetings:** Meetings may be recorded to ensure accurate documentation of discussions and the research co-design processes. The recordings will only be accessible to the VOICE Board Members and the UpTogether Research Agenda Team and **will not be shared externally.**
- **Access to Recordings for Absent Members:** If any member of the VOICE Board or UpTogether Research Agenda Team is to miss a meeting, they may request access to a recording of the weekly meeting to stay informed. These recordings will be available for a limited time and will be deleted according to the retention timeline outlined below.
- **Transcriptions:** Meetings will also be transcribed to support accurate documentation.
- **Deletion Timeline**
 - Audio recordings of VOICE meetings will be available in the shared VOICE Google Drive folder for three months after the meeting date.
 - Audio recordings will be removed from the shared Google Drive folder three months after the meeting date unless otherwise agreed upon by the VOICE Board and UpTogether Research Agenda Team.

Section 5: Implementation and Duration

A monthly review process will be implemented to evaluate the effectiveness of the partnership and adherence to the principles outlined in this MOU.

- UpTogether Research Agenda Team and the VOICE Board will co-lead reflections on what is working, areas for improvement, and opportunities for deeper engagement.
- UpTogether staff will establish feedback loops to ensure that research processes remain responsive to participant needs and aligned with liberatory research principles.

Duration

This MOU is at will and may be modified by mutual consent of the VOICE Board and UpTogether Research Agenda Team.

This MOU shall become effective upon signature by VOICE Board members and the UpTogether Research Agenda Team and will remain in effect until modified or terminated by the partners by mutual consent.

In the absence of mutual agreement, this MOU shall end on October 27th, 2025.