



How to Build a Mobility Movement

Leading on Opportunity's Approach to Economic Mobility in Charlotte

Leading on Opportunity Genesis

Charlotte in 2014 was all gas, no brakes: construction cranes filled the sky over Uptown, millennials streamed into the city, driving the demand for breweries, craft cocktails and hot yoga. The city was still basking in the international glow from successfully hosting the Democratic National Convention two years prior. Charlotte was a prosperous, thriving city on the rise.

So in that same year when a study by Dr. Raj Chetty of Harvard University's Opportunity Insights was released which ranked Charlotte last among the 50 largest US cities, and Mecklenburg No. 99 out of 100 counties in upward mobility, the reaction in the city was seismic. It was a wake-up call for some, and an overdue acknowledgement for others.

Charlotte responded with urgency, creating the Charlotte-Mecklenburg Opportunity Task Force led by Dr. Ophelia Garmon-Brown and Dee O'Dell. That led to the Opportunity Task Force Report intended to be a living document offering 21 strategies, multiple recommendations and tactics to improve upward mobility. Leading on Opportunity (LOO) was created in 2017 as an initiative of the Foundation For The Carolinas, to continue Charlotte's commitment and maintain momentum toward progress in economic mobility. LOO has since been advocating for and tracking the progress in Charlotte that is often not readily available to the public through data, strategy

and policy. Change is happening in large part through public-private partnerships, says Sherri Chisholm, who joined LOO in 2020 as executive director.

Leading on Opportunity is the bridge between the statistical, data-driven world and that of partners doing the work in the community, building on efforts that launched as early as the 1960s, picking up momentum in the 1980s. Among those efforts: Charlotte's economic boom, interstate banking, financial headquarters relocations, civic-led response to textile mill closures and prioritizing children's health, safety and education.

Leading on Opportunity Mission, Vision & Impact

Leading on Opportunity works to ensure that each child has the freedom and chance to dream, pursue those dreams and live a purposeful life — without exception. LOO endeavors to unite resources, embolden leaders and ignite civic imagination toward the prosperity of the next generation. LOO advises organizations on how to use data and build cross-sector relationships that accelerate Charlotte-Mecklenburg's progress and action toward improved economic mobility. Success is Charlotte and Mecklenburg County sharing commitment, aligning resources, and collectively working to improve economic mobility.



Leading on Opportunity Goals

Charlotte in many ways has and continues to be ahead in its approach to community progress. Collectively, the city refused to accept its low ranking, and made a commitment to improve lives in Charlotte. Charlotte is fortunate to have City and Council leaders who have made very intentional investments in data (for example, the City's Quality of Life Explorer. Charlotte has a thriving corporate sector that is attracting and recruiting talented data analysts all the time. There are numerous colleges and universities with ample student and faculty talent.

What was missing was a central entity to translate existing data into meaningful insights, and more importantly, action for local leaders. That is the sweet spot for Leading on Opportunity: applying structure and accountability to that momentum.

By 2027, Leading on Opportunity will continue to refine the gathering of data and knowledge; inform, equip and embolden civic leaders; advise on action towards sustained mobility, and create a sustainable organization.

“Chetty” Studies 2014 vs. 2024

Opportunity Insights, the Harvard University-based research group led by Dr. Chetty, in 2024 published *Changing Opportunity: Sociological Mechanisms Underlying Growing Class Gaps and Shrinking Race Gaps in Economic Mobility*, which showed Charlotte moved from No. 50 to 38 in economic mobility (the ability of children from low-income families to climb the income ladder and thrive).

Charlotte is now ranked No. 3 out of 50 on economic mobility progress, moving upward faster than peer cities. In addition, Mecklenburg is the only county in the country where low-income white children experienced no decline in economic mobility. However, progress is not a zero-sum game. The new study examines children born in 1992 across the United States—focusing on the bottom 20 percent of income distribution (about \$26,000 annual household income)—and compares the data to children born in 1978. Outcomes for children born in 1978 were the subject of the 2014 Chetty study, which ranked Charlotte last among the 50 largest US cities.

The Changing Opportunity study shows racial gaps are closing, but class gaps are widening nationally. Low-income white children are doing worse or remaining the same, while low-income Black children are improving.

“These results show that growing up in thriving communities — places where adults are employed and healthy and otherwise doing well — have a tremendous effect on the next generation,” Chetty says. “The new data shows that opportunity can change and points to lessons on how to change intergenerational opportunity in a fairly rapid timeframe,” he says.

Outcomes for low-income White, Hispanic, Asian, and Native American children have not deteriorated in Charlotte.

Charlotte's Progress

Charlotte's progress is supported up by a three-legged stool of an expanding economy, public/private partnerships, and nonprofits offering navigation services. When those determinants are working in coordination, barriers to economic mobility fall.

The Milken Institute named Charlotte among the top 10 cities for economic growth in 2024, citing the city's rapid job increase and expanding population. According to Charlotte Regional Business Alliance, an estimated 113 people move to the region every day.

Groups like the Crescent Coalition, an association of organizations committed to improving Charlotte's economic mobility for under-resourced students by helping them navigate middle school, high school, and college and ultimately enter the job market, are crucial for offering surround sound support to those in need.

Markers of Charlotte's public/private partnership progress in the past 10 years include:

- The Charlotte Executive Leadership Council's Executives in Residence program with Charlotte-Mecklenburg Schools has placed more than 30 companies and organizations in schools through loaned executives, financial contributions, and other support
- The investment in affordable housing and increase of the Housing Trust Fund from \$15M to \$50M, with another proposed increase to \$100M on the table
- Mecklenburg County's \$60M commitment to create Universal Pre-K (all 4-year-olds)



Advocacy in Action

The Opportunity Task Force report, which led to the creation of Leading on Opportunity, mentioned policy 57 times, recommending actions such as addressing damaging policy failures, urging funding of programmatic design and informed policy decisions, advocacy and having a voice in development of state policy agendas.

From the Task Force report: “The community’s greatest leverage for tackling intergenerational poverty and breaking down barriers to economic opportunity will come from focusing on systemic and structural change versus relying upon programmatic intervention.”

LOO is a proxy between organizations across sectors, and advocates for urban and rural communities to address needed policy interventions for improving economic mobility.



- **State** Catalyst action for ECE policy legislation
- **Local** Identify and support creative ECE solutions
- **Regional** Educate stakeholders about ECE policy priorities

The goal of coalition building and topical targeting is to inform policymakers about how changes to these policies would create better conditions to improve economic mobility. Charlotte’s mobility stagnation is the result of decades of policies and business practices that have led to a widening income gap and segregation.

LOO is working with and creating coalitions to address policies that increase access, availability, and quality of child care through local, regional and statewide advocacy.

Our Current Approach to ECE Policy		
	Tactics	Examples
	Educate stakeholders about ECE policy priorities	Meetings and presentations with regional business alliances, existing coalitions, etc. Host panel discussions
	Build support for local, creative solutions	Identify zoning changes that could expand access and availability of child care
	Catalyze action for ECE legislation	Participate in panel discussions; Contact state legislators

Across North Carolina, caregivers are unable to fully participate in the workforce:

- 200,000 NC parents cite lack of child care as the primary barrier to employment
- Current child care models are unsustainable
- Studies estimate the child care crisis costs North Carolina \$3.5 billion each year in lost earnings, productivity, and revenue

LOO has identified policy priorities and areas for action in early care and education:

- Increase funding for child care providers
- Improve family eligibility requirements (more access)
- Increase wages for child care workers
- Reduce barriers for expanding child care options

Leading on Opportunity has broadened the perception of advocacy to include grassroots organizations and businesses. Atrium Health, the Charlotte Business Alliance, Mecklenburg County, and the State of North Carolina are among the organizations that have shifted/changed policy after LOO advocacy interventions.



Opportunity Compass Origins

Charlotte was once 50 out of 50 in economic mobility, and has improved because of partnerships, economic connectedness, and navigation services. To continue improving local economic mobility, Charlotte needed the ability to track its progress year over year (rather than waiting up to 10 years for a national study). The city wanted to be able to gauge the short-term impact of programs and investments, and built the Opportunity Compass.

Launched in 2022, the Opportunity Compass measured 33 indicators of economic mobility across key areas of improvement: early care and education, college and career readiness, child and family stability, and the impact of segregation. Using publicly available data from 2015-19, the Compass establishes Charlotte-Mecklenburg's baseline for future progress.

LOO is the practical translation of big data, offering the community education and empowerment through data and expertise. Since 2023, LOO has hosted more than 50 hours of workshops with more than 100 nonprofits, and developed funder impact reports for Bank of America, Atrium Health, Ally Financial, and Mecklenburg County. Nonprofits can use data interpreted by LOO to inform their efficacy and strategy.

More than 100 English and Spanish-speaking Charlotte-area nonprofits have learned how to use the Compass to report impact, tell their story, and plan for the future.

Opportunity Compass 2.0

The Opportunity Compass organizes local economic mobility data that can be used by funders and nonprofits interested in aligning their work to common metrics.

Compass 2.0, expected to launch publicly in mid-late 2025, will display current nonprofit programs and financial investments that align with each of the local indicators, increasing the measurable indicators to 83. This information will help Charlotte-Mecklenburg to analyze its economic mobility efforts in new ways.

The updated Compass will be a valuable tool in tracking and measuring how Charlotte maintains that positive momentum. It will provide a shared language and accessible visualizations of the determinants of economic mobility to aid organizations and individuals in policymaking, fundraising, and community organizing. Economic mobility doesn't change overnight, and

the Compass helps LOO focus the work and sustain commitment, by providing a centralized location for economic mobility data.

On Metrics and Measurements

When discussing economic mobility data, there tends to be a narrative that revolves around projects, goals and KPIs. The gold standard is often the "best metrics," implying that if a city sets the "right metrics" everything will fall in place. While individual metrics are somewhat helpful, LOO posited that metrics alone won't impact economic mobility, because change happens too slowly to be meaningfully tracked through general community statistics; the shorter the list of "best metrics" the less we understand the pervasive nature of systemic problems, and systems change organizations cannot control individual ecosystem metrics.

The challenge LOO is working to solve is showing:

Define Ask what metrics really define economic mobility—what are the things that if we lean in on those areas we'd drive change?

Monitor Look over time to see which of those metrics are moving in the right direction, and where do we need to lean in further?

Align Our metrics are designed not primarily for accountability, but for alignment. Leading on Opportunity is seeking to use data to get NPOs, funders, and policymakers working from the same playbook toward the same goals.

Leading on Opportunity has found success by working within existing power structures to gradually bring leaders (and power structures) together in new ways. LOO excels at making sure that all power brokers—regardless of their hierarchy—are equipped with knowledge that enables them to be more effective in advocating for change and collaborating more effectively. LOO strives to equip all (grassroots, mid-level, CEO) in a way that enables them to be more effective together, while maintaining their separate positions of power.

Focused on understanding and integration within existing power structures, LOO builds trust and provides valuable insights/information—then, over time, leverages that to create more alignment and synergy on large, collective problems.

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