

Economic mobility

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Using Coaching and Navigation to Promote Economic Mobility: Insights from a Convening



The path to economic mobility for many Americans—especially the most vulnerable—is difficult. Economic mobility requires knowledge of available opportunities for jobs, education, and training. It also requires supports such as child care, health services, and transportation that enable people to take advantage of those opportunities. Accessing these opportunities and supports can be burdensome, difficult, and time consuming, and can be [especially challenging](#) for people who also face the stressors of poverty and the oppression of structural racism. These difficulties have been exacerbated by the 2019 novel coronavirus pandemic, which has disproportionately affected [workers in low-income households and people of color](#).

Concern about inequitable economic mobility has increased interest in coaching and navigation. These are approaches that are often provided in tandem and involve trained staff developing collaborative

relationships with clients to help them set and pursue goals, develop skills, and access relevant supports to achieve economic mobility (Box 1). Growing evidence suggests that coaching and navigation to help people start and finish postsecondary education; get, keep, and advance in jobs; and make and achieve financial goals can be effective in helping people on their economic mobility journey.

To inform the potential of coaching and navigation as part of its Economic Mobility and Opportunity strategy and shape an impactful learning agenda on the topic, the Bill & Melinda Gates Foundation partnered with Mathematica to conduct a virtual convening over three days in June 2020. The convening included a diverse group of experts, including designers and implementers of coaching and navigation programs, policy experts, researchers, coaches and navigators, people who had received coaching and navigation services, and foundation staff.

Box 1. Who are coaches and navigators?

Developing a one-on-one relationship with a client, a **coach** works in collaboration with the client in setting and pursuing individualized goals for economic mobility.

A **navigator** provides information to help clients locate, identify, and take advantage of opportunities in the labor market and the many complex systems that can support economic mobility.

These terms are not always used consistently. A coach may also navigate, and a navigator may also coach. One person can do both. Both coaches and navigators can play other roles in helping people achieve economic mobility.

For more information, see *Using Coaching and Navigation to Promote Economic Mobility: What is the Evidence?* ▲

The convening sought to include people with lived experience using coaching and navigation services, practitioners, and others to capture perspectives from all types of stakeholders who interact with coaching and navigation. (See page 4 for a list of convening participants.) This paper presents insights from the convening.

The value of coaching and navigation

/ **Coaching and navigation are important supports for equitable economic mobility.** The consensus at the convening was that coaching and navigation help clients set and pursue goals and navigate within and across the multiple siloed and fragmented systems—such as education, training, health, workforce, and public assistance—required to achieve economic mobility. Moreover, the underlying principle behind equitable coaching and navigation—empathy for the people being served and respect for the knowledge and skills each person brings—should anchor the provision of all services and supports. At the convening, people who had received coaching and navigation said they especially valued their

relationships with coaches and navigators and the guidance and encouragement received from them.

/ **However, coaching and navigation may not be enough for many people.** Many people face multiple, complex challenges to economic mobility. The education, workforce, health, public assistance, and other systems provide opportunities and supports. Coaching and navigation can help people take advantage of the opportunities and supports that exist. But if the opportunities and supports are insufficient or inaccessible for some people, those systems require changes.

Coaching and navigation approaches and implementation

/ **Evidence-informed approaches for coaching and navigation are available.** Five specific approaches to coaching and navigation for people seeking economic mobility were discussed at the convening: Goal4 It!TM, LIFT, Mobility Mentoring, MyGoals for Employment Success, and Pima Community College's student affairs advising program. (These approaches are further described in *Using Coaching and Navigation to Promote Economic Mobility: What is the Evidence?*) Although none of the five approaches has yet to be rigorously evaluated, all are informed by behavioral science evidence. All five approaches emphasize the collaborative relationship between the client and the coach or navigator but differ in how the coaching and navigation is provided and the extent to which they focus on employment.

/ **Coaching and navigation approaches must be adapted to their context.** Coaching and navigation approaches should fit the context in which they are implemented—the communities being served and the systems in which the services are offered. For example, public agencies providing coaching and navigation to clients who access public assistance benefits operate under different funding and policy conditions than nonprofit agencies supporting students enrolled in postsecondary education. The needs and goals of people receiving coaching and navigation might also differ, and the approaches should account for

both the financial and policy conditions and the interests of the people being served.

/ **Coaching and navigation programs should be implemented equitably.** Hiring, training, and supervision practices for coaches and navigators must prioritize cultural competencies and understanding of the experiences and identities of program recipients and seek to mitigate implicit biases. It is also important to consider how coaches and navigators are matched to clients. In adapting, implementing, and improving coaching and navigation approaches, people with lived experience of receiving coaching and navigation services, or who have faced the challenges the coaching and navigation are addressing, should be actively involved on an ongoing basis. *Using Coaching and Navigation to Promote Economic Mobility: How Can Programs Ensure Equity?* describes the learning from the convening on issues of equity.

/ **Virtual implementation can strengthen coaching and navigation practices.** The pandemic forced many coaches and navigators to pivot from providing services in person to providing them virtually, by telephone or video. Offering coaching and navigation virtually has advantages—it is cheaper, it provides more flexibility to clients who do not need to travel to meet with their coaches and navigators, and it appeals to digitally adept (often younger) clients. After the pandemic, virtual services may continue to supplement in-person services. However, programs need to address the drawbacks of virtual meetings. It might be harder to develop relationships with clients when meetings are not in person. In addition, many clients lack dependable Internet connection, the necessary hardware or software, or the digital literacy to take advantage of virtual coaching and navigation. *Using Coaching and Navigation to Promote Economic Mobility: How Might Programs Provide These Services Virtually?* discusses these issues in greater depth.

Need for more evidence

/ **Investing more in evidence will help maximize the value of coaching and navigation.** There is much more to learn about coaching and navigation. For example, evidence about which approaches are effective for whom and under what circumstances is sparse, as is evidence about how to successfully scale these approaches. We lack an accurate understanding of the costs of various approaches, reasons why some clients disengage from services, the underlying drivers and sources of inequities, and the effectiveness of providing virtual coaching and navigation services. To begin to answer some of these questions and ensure programs are meeting client and community needs, implementers should collect and interpret data as part of routine practice for continuous quality improvement purposes. Researchers, in collaboration with funders and practitioners, should also provide rigorous evidence on what works in coaching and navigation.

For more information, To learn more about coaching and navigation approaches and the steps stakeholders can take to promote these approaches, refer to the following resources:

- / *Using Coaching and Navigation to Promote Economic Mobility: What is the Evidence?*, which summarizes current knowledge about the effectiveness of coaching and navigation
- / *Using Coaching and Navigation to Promote Economic Mobility: How Can Programs Ensure Equity?*, which discusses opportunities to advance equity through coaching and navigation
- / *Using Coaching and Navigation to Promote Economic Mobility: How Might Programs Provide These Services Virtually?*, which examines the potential for how technology can strengthen coaching and navigation

Convening on Coaching and Navigation: Participant list

Name	Affiliation
Mary Anne Anderson	Mathematica
Beth Babcock	Economic Mobility Pathways
Kelly Bowes	Denver Early Childhood Council
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Julie Strawn	Abt Associates
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