

The Shared Prosperity Narrative
for Family Economic Wellbeing

RESEARCH AND TESTING



PROJECT COORDINATED BY:



Metropolitan Group
the power of voice

Please visit SharedProsperityNarrative.com
for a project overview, narrative playbook,
and other resources.



Metropolitan Group is a social impact design and implementation firm that works at the intersection of public health, environment and sustainability, and social justice. metgroup.com

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Please see [**SharedProsperity Narrative.com**](http://SharedProsperityNarrative.com) for a full list of project contributors.

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INTRODUCTION

All families deserve to prosper every day, and to create the future they want. But today's economic system was built for private ownership and market competition—not for the wellbeing of families and children, or for most people's prosperity. As our team explored ideas for unlocking innovative solutions to this long-standing challenge, we narrowed in on the need to change the dominant narratives about wealth in the United States.

Through co-creation, testing, and analysis, a new narrative emerged: "It's possible to create a system where all families have a fair shot at prosperity."

This report provides the background exploration and data that show how we arrived at narrative as a strategy, and how the new narrative took shape. It is the companion piece to the flexible narrative playbook.

This project was coordinated and led by [Metropolitan Group](#), with primary research support and thought partnership from [Social Insights](#) as well as numerous other researchers and participants. The [Robert Wood Johnson Foundation](#) provided funding. Please see [SharedProsperityNarrative.com](#) for complete acknowledgments.

BACKGROUND: EXPANDING ECONOMIC WELLBEING FOR CHILDREN AND FAMILIES

What would it look like for all families to have wealth, economic inclusion, and wellbeing? As we explored this question with organizations, advocates, storytellers, and community members, they described families from all backgrounds and communities feeling safe and prosperous, with the resources they need to thrive. They described a system where all families have physical, mental, emotional, and financial security to not only meet their daily needs, but to build the kind of life and future they want for themselves, their children and loved ones, and their communities.

But today, many people and families live in a different reality, struggling to get by despite years of hard work. The systems they navigate were built to keep many people—especially those targeted by structural racism and other forms of oppression—from enjoying the benefits of living in one of the most prosperous countries in the world. Numerous efforts—from economic justice to advocacy for children and families to wellbeing economy circles—attempt to address some of these injustices.

Many aim to expand access to “tried and true” wealth-building strategies that help people and families succeed within existing systems, including homeownership, higher education, entrepreneurship, and retirement savings. These are valuable and sometimes effective efforts (when engaged with quality and equity) that benefit many people.



APPROACHES THAT COULD MOVE FROM EXPANSION TO TRANSFORMATION

Our starting point hypothesis, however, was that these efforts on their own are not sufficient to create a generational shift in family economic wellbeing. Leading economists and economic justice practitioners have highlighted the limitations of traditional approaches to closing the racial wealth gap.

They suggest the need for new wealth-building strategies that work in the current and future reality, such as the growth of public resources, including caregiving, to create prosperity and stability beyond individual wealth, and major systemic shifts to build collective prosperity. Advocates also seek to expand the definition of wealth beyond material output and assets to prioritize time, freedom, health, and more; they also recognize that families and children need economic security and the opportunity and choice it helps to ensure.

In early 2024, our team set out to explore actions that could move beyond wealth-building within existing systems and propel transformative change, and the barriers preventing change from taking hold. We talked to many organizations in the field through both formal interviews (8) and informal conversations (more than 30). We reviewed existing research, articles, podcasts, and webinars, and collected a list of promising programs and policies. Through this process we heard that there is no “silver bullet.” Rather, participants and literature indicated that a comprehensive mix of solutions is needed.

Building the public and political will to dismantle the status quo was a dominant theme, and included the need to shift deficit-based narratives around wealth. Narratives are the shared stories and ideas that are most common across the U.S. population. Interviewees and the literature prioritized the following:

- Shifting from individual to collective wealth narratives, and from wealth to wellbeing narratives
- Interrupting anti-Blackness narratives
- Interrupting narratives of deservingness and the abilities of immigrants and persons experiencing poverty
- Shifting narratives, visibility, and respect for caregiving and other unpaid work, labor, and contributions



Interviewees also recommended other changes that would help advance transformative action. Recommendations for funders included the following:

- Shift to longer-term and flexible funding models that allow for experimentation, long-term change, and evidence building.
- Create a unified funding strategy to shift from scarcity to collective action.
- Shift power and funding to resource leadership by communities most impacted by the decisions being made—including support for community organizing, base building, power building, and electoral power.

Recommendations for economic justice and family wellbeing practitioners included the following:

- Focus more attention on the impact of climate change on economic inclusion and wealth.
- Engage in frank discussions about the plausibility of family economic justice under capitalism, despite reluctance among some funders and organizations to consider this or to openly discuss socialism or other systems. One interviewee summed this up with an Audre Lorde quote: “The master’s tool will not dismantle the master’s house.”¹

Please see the [Appendix](#) for a more detailed summary of this initial research phase.



1. Audre Lorde. “The Master’s Tools Will Never Dismantle the Master’s House.” 1979.

NARROWING IN ON NARRATIVE CHANGE

For the next phase of our work, we focused on narrative change, a consistent theme in our listening phase, an area of expertise and deep curiosity for our team,² and a priority for our funder, the Robert Wood Johnson Foundation (RWJF). Specifically, we focused on shifting from individual wealth to collective wellbeing and prosperity for children, families, and all people.

If this shift can happen at a population level—among those who vote, donate, shape public opinion, and make financial decisions in daily life and work—we can build support for practices and policies that advance prosperity for children and families.



We know, this can sound utopian and aspirational—but we have found compelling evidence and real openings for making this shift. If you are curious about the potential of creating this new future with the help of narrative change, then please keep reading. This resource is for you.

A flexible resource to use as it works for you

Our aim in sharing this research and the correlating narrative playbook is that organizations can take what they need, if it works for them, to inform their work. The intention is that as more organizations adapt and use the narrative, audiences begin to see that they are part of a large group that is dissatisfied with the status quo, to see evidence that change is possible, and to seek ways to support that change.³

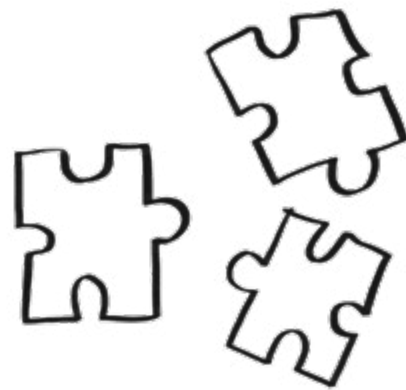
2. Two relevant resources that informed our approach to this work, and that may provide additional insights for practitioners are, (1) Kirkpatrick, Kevin, and Eric Friedenwald-Fishman. [Narrative: A Powerful Lever for Social Change](#). Metropolitan Group, September 2025; and (2) Messenger, Jennifer, Kirsten Gunst, and Anita Chandra. [Advancing a Well-Being Narrative](#). RAND Corporation and Metropolitan Group, October 2022.

3. When 25 percent of a population shifts its narrative, it influences social norms and creates social permission for something different (Centola, Damon, Joshua Becker, Devon Brackbill, and Andrea Baronchelli. [“Experimental Evidence for Tipping Points in Social Convention.”](#) *Science*, vol. 360, no. 6393, 2018, pp. 1116–19).

DIVING INTO WEALTH NARRATIVES

What is a more productive narrative about wealth, and who is the audience that could be moved by it? We used several methods to answer these questions:⁴

- We analyzed social media, podcasts, music lyrics, political discourse, and more to understand the current narrative landscape around wealth in general, and for children and families.
- We convened a small group of family and economic justice advocates to look at the data and co-create new draft narratives that counter the status quo and build support for family economic wellbeing.
- We tested those draft narratives through focus groups with 23 family and economic justice advocates; a national survey of 1,013 U.S. adults (census-representative by gender, age, race/ethnicity, education, and geography); interviews with people who move wealth; and innovative “rapid tests” to see how the narratives worked in social media, an open mic poetry event, live theater, games, news reporting, and activism.



Timing and context for our work

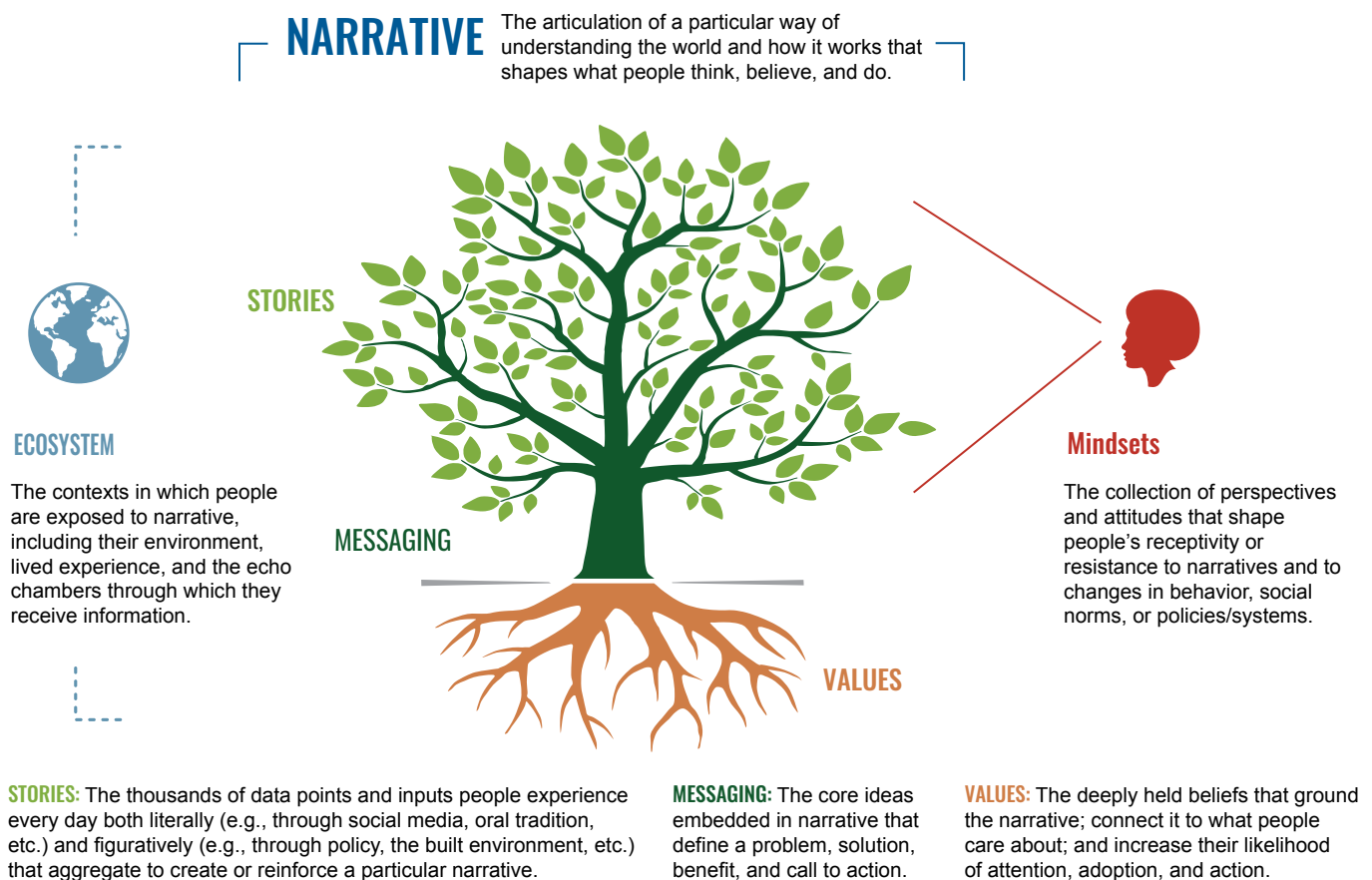
Our narrative scanning, development, and testing took place in 2025, starting shortly after President Donald Trump’s inauguration and continuing through rapidly and repeatedly shifting realities in Medicaid and health care, the tax system, immigrant rights, and many other issues that affect prosperity, security, and opportunity. This is an unprecedented social and economic environment. And it is impossible to ignore the lasting uncertainty and impacts of the current moment on various segments of the population, especially traditionally marginalized communities. We focused our goal and approach on the long term, building a narrative pathway to a generational shift.

4. See the [Methodology](#) for a more detailed explanation of narrative scanning and testing methods.

ELEMENTS OF A NARRATIVE

A narrative is a collection of stories (seen, heard, and experienced) that shapes how people understand a particular issue. Narratives are influenced by people's environments, echo chambers (all the places they get information), and lived experiences, and are often created and maintained to protect entrenched power and privilege. They can also be powerful tools of social change. Shifting a narrative is a long-term goal to get people thinking in ways that influence their actions over time, not a short-term strategy to win an election tomorrow.

Some narratives take shape organically, others are shaped intentionally. In both cases, a narrative includes three main parts: values, messages, and stories. We envision those like a tree interacting with the environment around it, as shown below.



For more, please visit [Narrative: A Powerful Lever for Social Change](#).



NARRATIVES ARE FLEXIBLE, BIG IDEAS—NOT TALKING POINTS

Narrative change efforts often offer evidence-based messaging insights that work as is—but this is not a mandate to use messages verbatim. The power comes when many organizations align with the narrative, the big idea, using myriad voices, cultural contexts, channels, experiences, and solution sets.

In this research, we explored a narrative that can engage a broad audience and create change in social norms, expectations, and culture. The narrative is purposefully designed to be adaptable so organizations can apply it to best engage their audiences with respect, hope, and a call for action. When many stories and experiences align with a narrative, they become leaves on the narrative tree, filling it out and drawing people away from competing narratives toward something resonant and new.

THE CURRENT WEALTH NARRATIVE LANDSCAPE HOLDS A HARMFUL STATUS QUO IN PLACE

To change narratives, it's important to understand the starting point. Wealth narratives are created, spread, and reinforced through influencers, pop culture, news and financial advice media, politicians, faith leaders, family and friends, podcasts, and many other channels. Narratives are rooted in national myths and historic narratives (e.g., "The United States is a rich country because we are hardworking, innovative, courageous people."). Dominant narratives are those that show up most often (i.e., frequency in datasets, plus recurrence across mediums and methodologies, plus reach), stick, and play a role in maintaining the status quo or creating demand for change.

We explored current narratives by scanning social media, podcasts (including a focus on conservative podcasts with our partner Bellwether Research), music lyrics, TV and movie themes, polling, and political discourse. This included a wide range of ideological perspectives; our team coded for both narratives we anticipated based on the earlier research phase and emerging themes. (Please see the [Appendix](#) for our scan methodology.)

Seven dominant narratives emerged, which are illustrated and described on the following page. Of course these narratives don't live in silos or have rigid borders.

They coexist and overlap, even within the same channels and voices. They compete with other narratives,⁵ stories, information sources, and information echo chambers, as well as with lived experience.

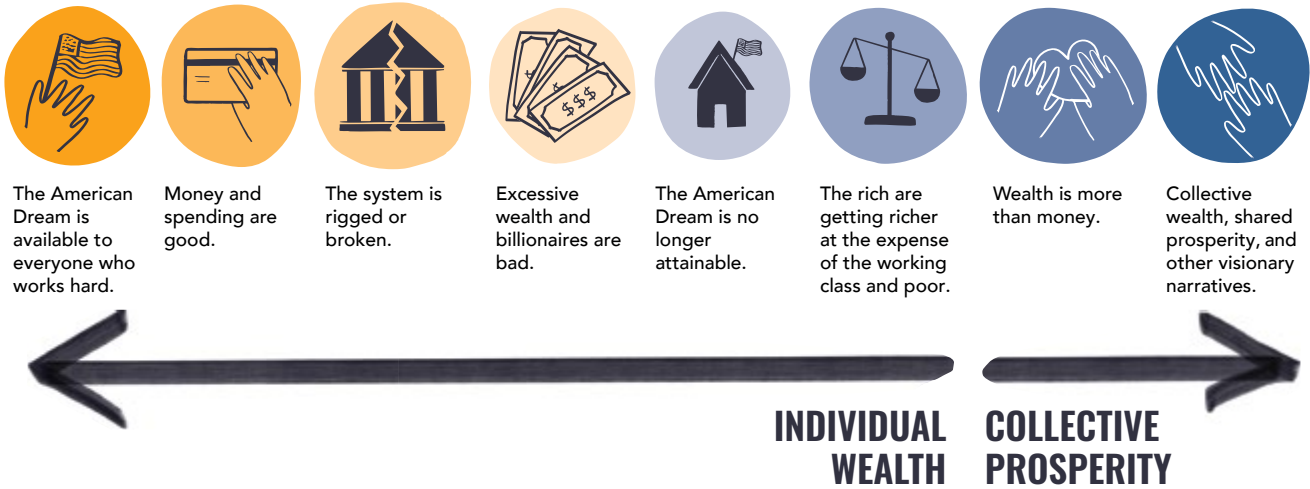
5. Many of the dominant narratives, especially those on the individual side of the spectrum, align with the narrative roadblocks described in [Health Equity Narrative House: Building a Transformative Narrative for Health Equity](#). Robert Wood Johnson Foundation, 5 Sept. 2024.

They are harmful because they

- reinforce mindsets of individualism, deservingness, and scarcity.
- are marked by cynicism rather than hope or possibility for change.
- focus on material consumption over thriving, and define wealth as largely financial; the few that go beyond money alone still reinforce that prosperity is based on a person's or family's work and worth.
- ignore child and family wellbeing.
- ignore or debate the need for public resources and shared responsibility.
- encourage competition and hoarding over collective prosperity.

EXISTING NARRATIVES ABOUT WEALTH

LESS DOMINANT NARRATIVES



Narrative: The American Dream is available to everyone as long as they work hard

In this framing, “America is the land of opportunity, and anyone who works hard and follows the rules can achieve financial prosperity, no matter their background.” This is a deeply entrenched historic narrative that suggests that financially prosperous people are deserving because they’ve worked hard. This powerful narrative has also shaped the mindsets of many immigrant communities and first generation Americans, who believe that reaching America is the path to economic freedom and financial prosperity, though these communities might not see the American Dream in purely individualistic terms.

Leading voice: Vivek Ramaswamy.

Impact: This narrative reinforces the idea that America is a meritocracy where working hard can bring success and anyone struggling is doing something wrong. While this narrative is motivating for some people, it ignores the historic and structural barriers that have excluded many Black, Indigenous, and people of color from the American Dream.

Values embedded in the narrative: freedom, prosperity, individualism, family, security, aspiration.



Narrative: Money and spending are good

This narrative defines and glamorizes wealth primarily as money, consumerism, and status, which lead to guilt-free individual satisfaction and personal reward. This narrative is often advanced on social media, with influencers selling an image and lifestyle that people believe is desirable.

Leading voices: Ramit Sethi, Ruben Gallego, and Joel Osteen.

Impact: This narrative reinforces the perception that wealth is defined purely in economic terms. It fuels a consumer mentality and for young people especially, drives a sense that they are inadequate or lacking if they don't conform to the ideals of wealth portrayed on social media.⁶ It strongly reinforces individualism and deservingness, signaling that the system offers opportunity to people who work hard enough.

Values embedded in narrative: autonomy, prosperity, individualism.



Narrative: The system is rigged or broken

Working hard is no longer enough (or never was), this narrative says, because the “system is rigged against working people.” A range of explanations describe how the system is rigged, by whom, and for what purpose.⁷ A common framing is that wealthy elites and corporations maintain an unfair capitalist system that benefits them and deepens inequality.

Leading voices: This narrative shows up across the political spectrum with some nuance. In general, framing on the left is more inclined to link the broken system to structural racism, while the right (especially the populist right) links it with class (education, income).

Impact: While the “system is rigged/ broken” narrative can be disheartening, it also creates a unique opportunity for a narrative to help people think differently about wealth and equality. Because this is a narrative that works on both the left and the right, it creates an opportunity to bridge ideologies.

Values embedded in narrative: fairness, prosperity, aspiration, security, family, responsibility.

6. Goldberg, Emma. “Are You the Only One Who’s Broke? Or Is It ‘Money Dysmorphia’?” The New York Times, 12 April 2025.

7. A [2024 Pew poll](#) found that most Americans (74 percent) believe the economy unfairly favors powerful interests, including increasing numbers of Republican voters. While a majority across all segments agree, this sentiment is strongest among people younger than 50 and people with lower incomes. Nearly two-thirds of Trump supporters (65 percent) say corporations have too much power compared with an overwhelming majority (84 percent) of Democrat-leaning voters (Pew Research Center, 2024).



Narrative: Excessive wealth and billionaires are bad

This narrative frames excessive wealth and billionaires as a negative and unfair force in the economy and society, driving inequality. It reflects the concern that “common people are being exploited and ignored by those in power.” This narrative contains a strong thread regarding the importance of the “common/working person” over cultural elites and the establishment. Both progressive and conservative voices carry this narrative; it is sometimes referred to as populism.

Leading voices: Bernie Sanders, Elizabeth Warren, and Ruben Gallego.⁸

Impact: The “common/working person” idea of this narrative has the potential to appeal to both conservatives and progressives. However, many people in the U.S. still aspire to amass as much money as possible, albeit for varying reasons, and may bristle at attempts to demonize billionaires because they hope that one day they will be among them. Within some conservative audiences, some billionaires (e.g., those whose companies are perceived to help the economy) are viewed favorably.

Values embedded in narrative: fairness, prosperity, individualism, responsibility.



Narrative: The American Dream is no longer attainable

This is the “flipside” of the earlier American Dream narrative, acknowledging that the promise is, and was created to be, out of reach for most people. Common framing suggests that “the American Dream is a lie” or a “rat race.” No matter how hard people work, it’s impossible to get ahead—and the goalpost keeps shifting. This narrative is common with Gen Z and millennials, who feel the pinch of student debt, homeownership out of reach, and the high cost of starting a family compared with the experiences of their parents or caregivers. These groups also tend to avoid signing on to a life dominated by stress and work. (In the examples we coded, we rarely saw structural racism named as the cause; the sentiment was that the American Dream was not built for most people. This suggests that the existing dominant narratives, including those that are critical of the current system, do not reflect diverse voices.)

Leading voices: picked up broadly in scan; no leading voice(s).

Impact: Similar to the “system is rigged,” this narrative can feel disheartening and has a negative framing, but it also creates an opportunity to discuss ways to make the American Dream more inclusive,

8. As an example of overlapping narratives, this quote from Ruben Gallego (Lulu Garcia-Navarro, The Interview, New York Times, Feb. 15, 2025) includes both this narrative and “money and spending are good.” “[‘Eat the ric’ is] not going to work. These people want to be rich. They want to be rich! And there’s nothing wrong with that. Our job is to expose when there are abuses by the rich, the wealthy, the powerful.”

equitable, obtainable, and based on a definition of wealth that includes wellbeing and healthy children and families.

Values embedded in the narrative: freedom, prosperity, individualism, family, security, aspiration.



Narrative: Wealth is more than money

This narrative was the second most frequent in the narrative scan, and it appeared in two different ways throughout the research:

- Wealth is defined by nonmonetary benefits, such as friends, clean air, spiritual connection, wellbeing, health, and other intangible benefits (without romanticizing poverty). This narrative aligns with themes of interconnection and holistic wellbeing that are prominent in Indigenous and other cultures, but we did not see those voices in the dominant narratives, again reinforcing the homogeneity of those with the largest platforms.
- Wealth is a tool to live the lifestyle a person wants. This framing combines both tangible goods (cars, houses, luxury brands) with intangible benefits (travel, work-life balance, community).

Leading voices: This narrative is found on both ends of the political spectrum. For conservatives it is directly tied to freedom and living life on one's own terms, and was most often found in conservative podcasts and among Gen Z. It aligns with more progressive wellbeing narratives, which assert that progress can't be measured by economic growth and consumption alone.

Impact: This narrative creates an important possible opening for redefining how we think about and define wealth. Because this narrative appears among both progressives and conservatives, it presents an opportunity for a bridging narrative that has broader appeal.

Values embedded in narrative: freedom, prosperity, autonomy, security, family, wellbeing.



Narrative: Wealth inequality in America: The rich are getting richer at the expense of the working class and poor

The narrative that the wealth gap and wealth inequality are hurting working families was the most frequently cited narrative in the scan. It criticizes the excessively wealthy for being greedy and out of touch and prospering from the labor of working-class Americans.

Leading voices: Bernie Sanders and Alexandria Ocasio-Cortez.

Impact: This narrative clearly states the problem of wealth inequality, but it lacks compelling messaging around, or hope for, a solution to wealth inequality.

Values embedded in narrative: fairness, family, prosperity, security.



Narrative: Collective wealth, shared prosperity

We scanned for this narrative but did not identify it at the frequency of those above. We found aspects of collective wealth related to equitable access to wealth for all people, redistribution of wealth, or sometimes shared resources as a family. Apparently, the idea of collective wealth as co-ownership, common or public resources (e.g., parks and libraries), taxes (e.g., “our collective money”), or other broad concepts, is not commonly understood or used in the mainstream discourse—and when it is, the connotation is often critical or fear-based. This is particularly true of conservative commentators (from the conservative podcast scan) who oppose any policy that they interpret as wealth redistribution.



VISIONARY NARRATIVES THAT CHANGE THE VIEW OF WEALTH AND PROSPERITY

We also wanted to understand the narratives about wealth advanced by economic and family justice advocates. These did not show up in the scan of dominant narratives, but are an important indication of where the dominant narrative needs to go. (Of note, in both the incubator and focus groups, participants from the economic and family justice fields pointed out that the progressive movement for change lacks a single shared narrative or solution set; thus the range of examples below.)

Themes in visionary narratives

From a review of narratives being used by economic justice organizations, we mapped the following themes:

- We believe no one has a natural right to rule over others. Power lies with the people, and we have the right to create an economy that works for all of us.
- We can make big, fundamental changes to do away with extreme wealth and the power that comes with it, so that our economy works and allows all families to have wellbeing, including space for care, rest, and time with loved ones for all families.
- Money is not our idol. Monetary wealth is not the end goal; it is one path toward collective wellbeing. Our economy sustains and liberates, rather than oppressing us.⁹
- Our worth is inherent. We recognize the many ways people contribute—caretaking, creating art, spending time with loved ones. We are not defined by our perceived worth based on the market value of what we produce for others.
- Full economic citizenship¹⁰ for people of color, including the right to be fully compensated and valued, have fundamental needs met, and experience safety and security.
- Our culture prioritizes wellbeing as the ultimate indicator of progress. We make decisions based on their impact on wellbeing.¹¹

9. [Health Equity Narrative House: Building a Transformative Narrative for Health Equity](#). Robert Wood Johnson Foundation, 5 Sept. 2024.

10. The term “full economic citizenship” is from [Liberation in a Generation](#).

11. MG, along with Wellbeing Economy Alliance and many others, have developed wellbeing narratives that are instructive in this work. See, for example, Messenger, Jennifer, Kirsten Gunst, and Anita Chandra. [Advancing a Well-Being Narrative](#). RAND Corporation and Metropolitan Group, October 2022.

Values in visionary narratives

- Abundance
- Aspiration, hope
- Family
- Fairness, dignity
- Freedom, agency, choice
- Interconnection, solidarity
- Participation, purpose
- Racial equity
- Security
- Sustainability (environmental)
- Wellbeing, joy, ease



DEVELOPING AND TESTING NEW NARRATIVES

Since the scan didn't surface one ideal narrative to lift up, we convened a "narrative incubator" of seven activists, movement builders, researchers, and communicators working on narrative change within the economic and family justice fields.¹² Over two days, the group explored how narratives about wealth need to shift—at a broad societal level—to center children and families; reframe wealth beyond monetary constraints; emphasize systems change; and transcend ideas of individualism, meritocracy, and deservingness.

STARTING WITH VALUES

Values root a narrative in what people care about and increase connection to the new narrative.¹³ Because we are aiming for a shift in dominant, societal narratives, we need an option that can be broadly relevant and engaging for many people. Therefore, our approach is to create a narrative that has a toehold in existing values so it is relevant and credible, then quickly bridges toward the visionary values.¹⁴

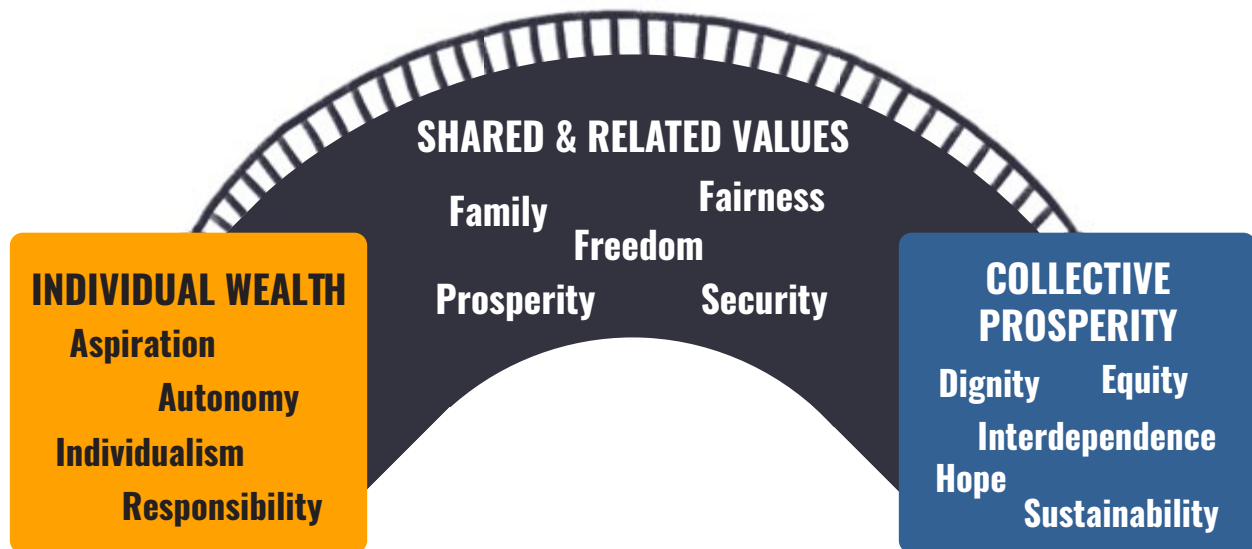
To do this, we first mapped the values in both existing individual wealth narratives and visionary collective prosperity narratives, then examined the overlap.

12. For the incubator participants, and all project contributors, please see sharedprosperitynarrative.com/#acknowledgements.

13. Our approach to values is shaped in part by, (1) Schwartz, Shalom H. "The Refined Theory of Basic Values" in Values and Behavior. Edited by S. Roccas and L. Sagiv, Springer, 2017, pp. 51-72; and (2) the [World Values Survey](#).

14. We acknowledge that this is one of many approaches to narrative development. Other narrative practitioners, including some we interviewed, dismiss the existing narratives entirely and focus on seeding a transformative new narrative. The narrative and audience analysis in this research can also be helpful for that approach.

VALUES OF NARRATIVES ABOUT WEALTH



As the group explored these values, they looked for additional ways to amplify visionary values by tying them to elements of current values. For example, freedom is a complex value; here, we lean into the aspects of dignity, agency, and choice, and we embed equity. We can build hope by connecting with aspiration and prosperity.

This brought us to the values that shaped creation of the test narratives:

- Family (family, however defined, and children are priorities)
- Fairness and equity (everyone has a fair shot, gets what they need)
- Interconnectivity (responsibility, reciprocity, solidarity, care, and love)
- Hope (generations, future thinking, aspiration for something better)
- Freedom (agency, opportunity, choice, dignity)
- Prosperity (human and planetary wellbeing, purpose, safety, security)

What about individualism?

As noted, the existing narratives—and dominant U.S. meta-narratives and mindsets—include individualism and meritocracy. While we don't want to use these as root values for a new narrative, we do nod to them. For example, the test and final narratives acknowledge that many people are proud of their work and contributions and want to be fairly compensated.

NARRATIVES FOR TESTING

Anchored in the values as well as their own narrative work, the group created two draft narratives, shown here color coded with the values:

FAMILY	FAIRNESS AND EQUITY	INTERDEPENDENCE
HOPE	FREEDOM	PROSPERITY

Let's Create More Ways to Reach the American Dream

We all want to create and enjoy our lives and futures. That's the promise of the American Dream. But chasing the American Dream has become a nightmare. For most people and families, working hard and saving isn't enough anymore. The hard work of many leads to growing wealth for a few. It doesn't have to be this way. Together, let's create more ways to reach the American Dream so every person, every family, and every community prospers—now and for generations to come.

Together, Everyone Thrives

America has enough to meet the needs of every community, family, and child. But some people want us to believe that for each of us to succeed, others must suffer. We know better. We know how they rig the system to make us feel alone, scared, and divided. It's time to stop a greedy few from hoarding the wealth we all created. We can hold our leaders accountable to ensure that this is a country where everyone has what they need today and can build a better tomorrow. None of us has to go it alone. We can create shared prosperity, where everyone benefits from the wealth we all created. Together, everyone thrives.



INITIAL TESTING

We then tested the narratives to see what resonated, and with which audience(s). Testing included the following (please see [Appendix](#) for more information about each method):

- **Focus groups with the field.** People working in economic and family justice reflected on which narrative elements worked or didn't work, how they might resonate with different communities, and how this work could be of most use to the field. This effort was led by our partners at Social Insights.
- **Rapid tests.** We identified and funded 15 individuals and organizations working in various mediums to bring the draft narratives to life and see what resonated in real time with their audiences. They fully embraced the challenge and created a range of experiments—including theater projects, news media stories, social media engagements, activism, and youth voice. Two examples appear below (please visit SharedProsperityNarrative.com to see them all).



Rapid test social media post by influencer and artist Lisa Congdon.



Rapid test youth open mic poetry event organized by Dr. Stephanie Tilley.

- **Literature scan.** We scanned 45 reports, articles, podcasts, recordings of presentations and webinars, and TED Talks for existing research and messaging on key themes in the test narratives: American Dream, rigged/broken system, and collective prosperity.

ADJUSTMENT AND FINAL TEST

We slightly adapted the narratives to incorporate emerging insights, then tested them in a national online survey of 1,013 U.S. adults (the sample was census-representative by gender, age, race/ethnicity, education, and geography). The survey, led by our partners at Prime Group, provided quantitative data on both the narratives and audience segmentation. The most significant change we made was in the “American Dream” language, which was divisive in focus groups and rapid tests. In the survey, we showed half the respondents a version with “American Dream,” and the other half a version with “economic wellbeing” so we could be sure that participants were reacting to the narrative concept overall, not just the term.

Fair Shot

We all want to create and enjoy our lives and futures. That’s the promise of [the American Dream/economic wellbeing*]. But chasing [*] has become too difficult. Not everyone has a fair shot, and for most people and families, working hard and saving isn’t enough anymore. We can change this. In places across the country, communities are already building new pathways to [*]. They are creating more ways for people and families to meet their daily needs, make time for joy and rest, and save for emergencies and future plans. Together we can create more ways for people to reach their own dreams so that every person, every family, and every community prospers—now and for generations to come.

Together, Everyone Thrives

This country has enough to meet the needs of every community, family, and child. But, too often [the American Dream/economic wellbeing] can feel like a competition. The system is set up for some to succeed and others to struggle. We should all benefit from our hard work and share the prosperity we build together. An economy where we all win, today, in our future, and for generations to come, is within reach. We can create shared prosperity, where everyone benefits from the wealth we all created. Where people and families have plenty, and we all share things like clean air and water, parks, schools and libraries, and roads. Together, everyone thrives.

FAMILY	FAIRNESS AND EQUITY	INTERDEPENDENCE
HOPE	FREEDOM	PROSPERITY

TOPLINE TESTING FINDINGS

Summary of findings detailed on the following pages

- 1. A significant audience is ready to support transformation.*
- 2. Both narratives resonated in different ways across the testing methods, leading to a set of core values and messages that can create a new narrative.*
- 3. "Prosperity" and "economic wellbeing" are more galvanizing than "wealth" and "American Dream," and can carry meaning beyond financial success.*
- 4. Many of the actions we tested had strong support; continuing to build awareness of those that most benefit children and families is a priority.*
- 5. Public resources need to be included in both the definition of prosperity and in changes to systems to advance economic wellbeing for children and families.*
- 6. Showing how the system is broken, and the impact, is more compelling than blaming someone for building it unjustly or breaking it.*
- 7. Sharing examples of changes already happening is essential for helping people to envision what could happen, see that it's real already, and believe that more could be possible.*
- 8. An opportunity also exists for a new narrative to influence practices in the financial and philanthropic sectors.*

Please see the [Appendix](#) for a more detailed explanation of each of these findings.

1. A SIGNIFICANT AUDIENCE IS READY TO SUPPORT TRANSFORMATION.

Organizations working in family and economic justice, including many in the incubator and focus groups, have identified the need to engage a larger audience who have shared values, are deeply dissatisfied with the status quo, and are open to changes. One of our objectives was to identify this broader, “ready-to-engage” audience. (Other organizations prioritize activating their already-committed supporters; they may find these insights useful during times when they need to reach more broadly, e.g., during policy work.)

We prioritized two indicators to identify this larger audience: (1) feelings about how well the current economic system supports families to prosper; and (2) desire to preserve, reform, or replace the current economic system.

This illuminated two groups that are especially ready for and influenced by the shared prosperity narrative. These are summarized below; please see the [Appendix](#) for details on both of these audiences as well as the likely opposition.

Potential champions (27.5 percent of U.S. population)* who say the current economic system should be replaced AND that it does not allow most people and families to prosper. The narrative can activate them and give them language to rally others.

Persuadables (35.8 percent of U.S. population)* who say the current economic system should be preserved, reformed, or replaced AND that it does not allow most people and families to prosper OR they are not sure. By leading them from what they know to the new possibilities you offer, you can shift them from accepting current narratives to seeing and demanding something new.

** Based on our national survey of 1,013 U.S. adults (census-representative by gender, age, race/ethnicity, education, and geography). See the research for details.*

2. BOTH NARRATIVES RESONATED IN DIFFERENT WAYS ACROSS THE TESTING METHODS, LEADING TO A SET OF CORE VALUES AND MESSAGES THAT CAN CREATE A NEW NARRATIVE.

Core values

Testing validated and augmented the values identified in the narrative incubator. The recommended values to root the new narrative include the following:

- **Family** (born, created, or chosen; respect for ancestors, present day family, future generations)
- **Fairness and equity** (everyone has a fair shot, gets what they need, are not cut off from opportunity)
- **Interdependence** (recognizing both individual and shared responsibility; community, care, and love; belonging)
- **Hope** (possibility; space to dream and create; belief that things can change)
- **Freedom** (agency, choice, opportunity; dignity)
- **Prosperity** (thriving in all dimensions of well-being, including economic security, today and in the future)

Effective messages

The survey prioritized the following messages, taken from both narratives. When layered together in the order below, they build agreement, persuasiveness, and willingness to share the idea with others.

We are building a narrative, not a prescriptive message frame. The messages in this section are tested, and can be used as is. These themes can also be framed in many different forms, articulations, languages, voices, cultural contexts, and solution sets. The final narrative in the playbook reflects and builds on this core set of ideas as well as additional messages validated in testing. Organizations can adapt and use it as they desire to advance their mission and strategy.

These four messages, in this order, engage 88 percent of the audience.



3. “PROSPERITY” AND “ECONOMIC WELLBEING” ARE MORE GALVANIZING THAN “WEALTH” AND “AMERICAN DREAM,” AND CAN CARRY MEANING BEYOND FINANCIAL SUCCESS.

In the survey, when we asked people to define “American Dream,” “economic wellbeing,” or “wealth,” they choose very similar definitions for each: (1) providing a better future for my children and loved ones; (2) financial security now and the ability to save for the future; and (3) living in a country where everyone has equal rights and protections.

However, in focus groups and rapid testing, the terms “American Dream” and “wealth” were divisive and often limited people’s ability to move from anger at the status quo to hope for change. By contrast, the terms “shared prosperity,” “economic wellbeing,” or the more colloquial “fair shot” carried similar meaning with less charged connotation and more space for possibility thinking.

The term “wealth” also has many meanings and can reinforce existing harmful narratives. In the incubator, focus groups, and rapid testing, participants said the term can create harm and shame for some people, especially those struggling to survive. In focus groups and rapid tests, the term “wealth” made it hard for some participants to see beyond monetary or financial terms.

We were curious about how a new narrative might expand the definition of wealth beyond material or financial assets; a narrative that could build a case for public resources that provide shared assets and benefits such as security, care, and rest. A similar need is to reframe success and contribution beyond production and market values, to include unpaid labor like caregiving, community building, and art making, as well as intrinsic human value and a right to thrive. The following insights informed inclusion of this concept in the final narrative and messages:

- The survey definitions described above suggest an opening to continue reiterating the many things that encompass prosperity. Still, “opportunity to succeed through hard work” is in the top five definitions for each term. And “wealth is more than just money; we can change our economic system to redefine wealth to include time for joy, rest, and care” was ranked as one of the weakest reasons to change the economic system. Storytelling and narrative repetition are needed to shift this material-centric perception.
- Rapid tests yielded many stories that defined wealth or prosperity and what matters. Most of the experiments yielded a shared sentiment that true success or wealth involve relationships, stability, an ability to weather a storm, time for rest and personal pursuits, and other priorities. Still, in reality, without financial wellbeing to pay the bills, these other things are hard to come by.
- Many incubator and focus group participants used direct language about intrinsic human value, dignity, and worth beyond production.



4. MANY OF THE ACTIONS WE TESTED HAD STRONG SUPPORT; CONTINUING TO BUILD AWARENESS OF THOSE THAT MOST BENEFIT CHILDREN AND FAMILIES IS A PRIORITY.

The survey offered respondents an array of changes that could make it possible for more people and families to prosper. Effective messaging brings people along by starting with the most familiar and supported actions, then layering in newer ideas.

Bellringers included actions supported across all three audience segments at an average 70 percent or higher:

- Fair taxes, where all people pay their fair share (79 percent average support across the survey sample)
- Job training for the jobs of the future (79 percent)
- Ways for more people to save for retirement (79 percent)
- Affordable ways to care for older adults at the end of life (78 percent)
- Free or affordable health care, without medical debt (77 percent)
- A living wage for everyone (75 percent)
- Welcoming and fair banking, with low fees and rates (72 percent)

Strong support but may require more context included actions with 50 percent to 69 percent support across all three audience segments:

- More opportunities to own a home, or to build wealth through renting (68 percent average support across the survey sample)
- Free or affordable higher education, without debt (66 percent)
- Free or low cost child care (63 percent)
- Tax credits that benefit families with children (60 percent)
- Easier ways for people to start their own business (58 percent)
- Ways to build wealth together, like through employee-owned businesses (53 percent)

Warm up before sharing included actions with 30 percent to 49 percent support across all three audience segments:

- “Baby bonds” or saving accounts for all children (39 percent); (it is worth noting that 42 percent of the likely opposition group supported this change, compared with 36 percent of persuadables and 39 percent of potential champions)
- Reparations paid to Black and Indigenous people to repair the damages done (35 percent)

Actions focused on children and family wellbeing

This project explored how to keep children and families—and solutions that benefit them—centered in wealth narratives. We intentionally did not define “family.” Instead,

we asked and listened. In many of our testing discussions, people talked about the need for all people, especially those historically excluded, to have reliable, generational prosperity. Changing the dominant narrative on wealth for families, they said, ultimately benefits children without excluding families without children, chosen families, older adults, and individuals.

Several of the rapid testers focused on child care; many described how the current system harms or excludes children and multiple generations. In conversations about public resources, people pointed out the need for child care and for access to care in general—for older adults, people living with disability, people with mental health needs, and more—as well as the value of care overall.

Still, in the survey “affordable ways to take care of older adults and people at the end of life” ranked higher (78 percent) than “free or low cost child care” (63 percent). This highlights the need to ensure that support for child care stays in the care conversation; it also verifies the strong support for care as a public good.

5. PUBLIC RESOURCES NEED TO BE INCLUDED IN BOTH THE DEFINITION OF PROSPERITY AND IN CHANGES TO SYSTEMS TO ADVANCE ECONOMIC WELLBEING FOR CHILDREN AND FAMILIES.

Survey respondents understand and value the concept of public resources and agree that they are important elements of prosperity. Healthy and safe communities, access to health care, and caregiving came up often in the rapid test. However, current dominant wealth narratives perpetuate individual responsibility and often exclude public resources. A robust set of public resources invests the taxes created by collective contribution into collective wellbeing. It shifts the expectation from solely individual input, merit, and benefit to shared contribution and shared thriving. Ideally, public resources will include benefits already expected in the United States (education, clean air and water, public safety, parks, etc.) as well as a more robust care system (child care, care for older adults, health care).

This puts public resources squarely at the intersection of two important economic reforms that benefit children, families, and all people: (1) creating a more equitable way to collect and invest taxes, and (2) building a care economy where caregivers are valued and care services are available as a public resource.

6. SHOWING HOW THE SYSTEM IS BROKEN, AND THE IMPACT, IS MORE COMPELLING THAN BLAMING SOMEONE FOR BUILDING IT UNJUSTLY OR BREAKING IT.

According to the FrameWorks Institute, rigged system framing,¹⁵ reinforces how systems work, and lessens or prevents blaming individual communities or groups of people for not achieving wealth within a system that currently works for some but not all people. If it's necessary to name a villain, the report suggests, blaming a group of people is more effective than blaming individuals.

We discussed this in the narrative incubator, where participants cited research showing that villainizing billionaires or even corporations can backfire because it can appear to be partisan or skewed, and because people aspire to be wealthy and want to keep that pathway open for themselves one day.¹⁶ One test narrative included the nonspecific phrase “they rig the system,” but that was too unclear in testing, and some focus group participants shared that talking about *who* broke the systems is less effective than describing *how* systems are broken and how they might be unrugged.

Underscoring the power of people to fix the system is vital. In their 2023 messaging guide on [Structural Racism and Health](#), the Robert Wood Johnson Foundation suggested, “Since people created the laws and social practices that shape these opportunities, we can reinvent them.” The guide also provides insights for naming structural racism as the cause for the broken system, for organizations that are ready to safely engage in that conversation.

Financial security interviewees stressed the need to name how every sector—government, banking, corporations, media—has a hand in creating new pathways and systems. Several cautioned against narratives that seem to blame banks more than others—although the pressure may be effective, it can also be alienating and create defensiveness.



15. [How to Talk About Rigged Systems: A Quick-Start Guide](#). FrameWorks Institute, 28 Jan. 2025.

16. [Anxiety, Aspiration, and Agency: Refocusing America's Tax Debate for Working People](#). Economic Excessive Wealth Disorder Institute, April 2025.

7. SHARING EXAMPLES OF CHANGES ALREADY HAPPENING IS ESSENTIAL FOR HELPING PEOPLE TO ENVISION WHAT COULD HAPPEN, SEE THAT IT'S REAL ALREADY, AND BELIEVE THAT MORE COULD BE POSSIBLE.

Aside from the actions described in the survey, most people aren't sure what can be done. Because existing wealth narratives are so ingrained, it's easy for people, even those committed to family and economic justice, to fall into status quo ideas and actions.

In rapid testing, the narrative prompted people to say: "OK, I'm with you, but how would this happen, what would be different, what can I do?" This is the reaction we want a narrative to prompt, because a narrative is about a big idea, not a specific policy platform. A narrative's goal is to open people to the idea of changes, and motivate them to ask activation questions (e.g., how, who, etc.).

With people engaged and curious, organizations are teed up to make the case for their action or policy. Storytelling can disrupt status quo thinking by challenging people to think creatively about a different future. And by linking to the narrative and other actions happening across the country, organizations can show that their work is not isolated but part of a growing trend that can become the new normal.



8. AN OPPORTUNITY ALSO EXISTS FOR A NEW NARRATIVE TO INFLUENCE PRACTICES IN THE FINANCIAL AND PHILANTHROPIC SECTORS.

As a final phase of our research, we interviewed eight people who work in the financial and philanthropic sectors working on asset and wealth building (e.g. banks, economic development institutions, investors, and philanthropists interested in economic inclusion). They see their potential to shift the narrative, and want to do so. They are constantly fighting intentional, fiercely reinforced individual and meritocracy wealth narratives and related practices in their field, in their organizations, with their clients, and among influencers.

One interviewee said, “So many people hope a better system is possible but are being told ‘that’s not how it’s done, it won’t work, you don’t know enough.’” We heard this theme repeatedly. This is especially true, they said, for younger philanthropists (either next-generation stewards of family wealth or new-wealth holders), who start out idealistic but are quickly called back by advisors, trustees, family members, and others.

The new narrative could be effective, they said, with more specificity about what’s already working and on why wealth matters for families. They need more case studies, including both studies that show how to make typical wealth-building approaches more equitable (e.g., expanded credit and access to capital), and studies that show wholly new tools and system shifts. This combination is important to expand approaches and to avoid unintentionally reinforcing individualism and the status quo.

Several interviewees work directly on the racial equity gap and may themselves be comfortable with the more visionary narratives used by the economic justice field. These interviewees talked about the need to disrupt the long-held and harmful assumptions about creditworthiness and collateral, particularly among borrowers of color—assumptions driven by biases, structural barriers, and systemic racism. Significant opportunity exists to help these leaders use their collective voice and influence to advocate for shifts in policies, public resources, and systems that would substantially impact family wellbeing and change the enabling environment for their core business.

However, these practitioners often must convince colleagues or others in the sector who are not yet open to conversations about systemic racism. Therefore, the prosperity narrative we tested with them felt effective because it is grounded in the reality of the current system, makes a strong case for greater change, and is flexible enough for them to add more direct language when the conditions are right.

READY TO GO? DOWNLOAD THE **NARRATIVE PLAYBOOK**

Our team analyzed these inputs, with gratitude to all our partners and contributors, and built a narrative playbook with flexible pathways to reach persuadable and champion audiences.

Please explore the narrative playbook and try on the new narrative elements, the recommended values, the sample messages that anchor it, and the ideas for storytelling and experience making to shift the narrative about wealth. Add your own stories and voice to engage your constituencies and to authentically advance the shared narrative in ways that are real and relevant for your work.

Please visit **SharedProsperityNarrative.com** for a flexible narrative playbook, a full list of project contributors, and other resources.



APPENDICES

APPENDIX METHODOLOGY

Initial Research Phase

Learning Goals

1. What are some alternatives to typical wealth building—definitions, initiatives, actions, or ideas—that are happening in the field?
2. What does the field think are useful pathways or methods for elevating alternative wealth-building initiatives, actions, or ideas?

Activities and Deliverables

- Brief document and written material review (e.g., books, podcasts, articles, reports)
- Three first-round, concept-testing conversations with nonprofit organizations focused on economic system reform and/or economic justice
- Comments from presentations and informal conversations at the RWJF Healthy Children and Families Fall 2024 national convening
- Interviews with individuals from 10 nonprofit organizations pursuing family and economic justice
- Qualitative analysis: Emergent thematic coding of eight transcripts from the second set of interviews (those for which recordings and transcripts were available)

Narrative Research Scan to Identify Current Narratives

Learning Goals

1. What are the current dominant narratives about wealth?
2. What are the values underpinning those narratives?

Activities and Deliverables

- Literature review: The literature review provided a picture of the existing narrative research and/or guides related to wealth and, where possible, children and families, from the past five years, offering a foundation of existing work to build on. We compiled an initial list of just under 130 resources by searching for terms such as wealth, prosperity, and economic inclusion/equity. We narrowed that to a set of 40 resources to explore, divided into three categories: narrative or message guides, additional research-based literature, and relevant articles or blogs, based on available factors, including publication date, relevance to the key research question, and alignment with pre-identified values. (See bibliography.)
- Scan of existing narratives: Metropolitan Group (MG) conducted the narrative scan using a mixed methodology, relying largely on quantitative analysis. The research team used Atlas.TI to code data points (social media posts, podcasts, interviews, song lyrics, etc.) for narratives, themes, and values using a combination of preset narrative codes (deductive) based on Phase 1 findings, and narrative themes that emerged from the data during research (inductive). Inputs included the following:
- Social media and public discourse scan: We reviewed and coded six months of social media and public discourse, which provided the majority of coded data points used to identify narratives and values. In total, we coded 510 data points for narrative themes and values from an analysis of 2,583 social media posts of 68 influencers across Facebook, Instagram, and X (formerly known as Twitter) over a 14-month period (February 2024 – March 2025).
 - *Conservative podcasts: Our partners Bellwether Research scanned 27 conservative and conservative-leaning podcasts during a roughly three-month period (January 19 – April 11, 2025), which provided a deeper window into the conservative ecosystem to supplement conservative/right social media influencers.*
 - *Pop culture: The pop culture and entertainment scan provided insights into the role of music and entertainment in shaping narratives about wealth, primarily over the past five years (with songs going farther back), through a curated list of entertainers, songs, movies, and TV shows containing themes of wealth. We reviewed 35 popular culture sources (songs, TV shows, movies, and articles), reduced from an original list of over 60 sources, using criteria that included*

music streaming data, music charting history, commercially successful or critically acclaimed TV shows or films, and on-topic material that spoke most closely to narratives about wealth.

- *AI queries: A series of ChatGPT queries showed how AI is providing information about wealth and wealth narratives. We used 13 different queries to gauge a set of responses to specific questions. (Note that ChatGPT was not used as a research tool to identify existing narratives, but rather to understand what narrative it perpetuated as an information system itself.)*
- Existing polling: A review of recent polling on wealth and the economy included the following:
 - *Empower’s “Secret to Success” study fielded by Morning Consult, September 13 – 14, 2024*
 - *Qualtrics study on behalf of Intuit Credit Karma, December 18 – 26, 2023*
 - *The Excessive Wealth Disorder Institute’s compilation of polls conducted from 2020 through 2023*
 - *Americans and Billionaires Survey, The Harris Poll, May 31 – June 2, 2024*
 - *Families Over Billionaires Poll, February 12 – 16, 2025*
 - *Lake Research Partners, Taxes and Caregiving Poll, January 31 – February 11, 2024*
- Engagement with the field: Ongoing conversations with people working in wealth narrative and related spaces, combined with insights from the first phase of work, continued to ground us in the current movement and the additive value our work can provide. This included discussions with Wellbeing Economy Alliance, The Norman Lear Center, Harmony Labs, Asset Funders/Oregon Economic Justice Roundtable, and Future Currents; group discussions with RWJF grantees working on narrative change (The Maven Collaborative; Liberation in a Generation; Institute on Race, Power, and Political Economy; Excessive Wealth Disorder Institute; BLIS Collective); participation in the RWJF Mindsets Consortium; participation in RWJF’s Well-Being Project Regional Summit; participation in the Washington Economic Narratives Roundtable; and insights from related MG work on democracy, health equity, and other themes.

Testing the Narrative Elements

Research Goals

1. Which narrative, or elements of the narrative(s) have the most potential to shift dominant perceptions about wealth?
2. What audience(s) are primed to adopt a new narrative?

Activities and Deliverables

- Survey: We conducted an online survey with n=1,013 completes and a +/- 3.5 percentage point credibility interval at the 95 percent confidence level. This nationwide sample, which was census-representative by gender, age, race/ethnicity, education, and geography, gave us deep insights into audiences who could be open to a new narrative about wealth. The survey sample was also weighted to match Gallup's party ID 2025 Q2 tracking data, which identified R 28 percent, D 27 percent, Ind 45 percent. The survey was conducted from August 13 to 19, 2025.
- Focus groups: In July 2025, Social Insights (SI) and Metropolitan Group conducted four focus groups with people working in economic and family justice ("the field") to examine the two narratives developed within the incubator. We wanted to understand the perspectives of organizations that might benefit from the research and/or use the resulting new narrative. SI and MG, with RWJF input, identified and invited about 50 people we either met through prior phases of this work or whose perspective could inform the testing. Many had familiarity with, if not deep expertise in, narrative as a strategy for social change. Twenty-nine people accepted the invitation and participated in the groups.
- Rapid testing: We partnered with and funded 15 individuals and organizations to develop creative content using the two draft narratives and to test the creative content with their audiences. Each had to use the key theme, values, and message elements of the draft narratives, but was given complete creative freedom beyond those standardized elements. Experiments included a game, a spoken word open mic with young poets of color, posts from a social influencer, experimental theater and musical pieces, reported and first-person articles, and conversations hosted by activists working for economic justice within communities, worker-owned businesses, and union members.
- Literature scan: We revisited the key themes in the two wealth narratives—together we thrive and the American Dream—through an informal scan of key themes: the American Dream, wealth and collective prosperity, and a rigged (or broken) system. We scanned 45 reports, articles, podcasts, recordings of presentations and webinars, and TED Talks to understand how these themes are represented in

the literature and in conversation. While the reviewed resource dates ranged from 2018 through early September 2025, a majority of the commentary was published in 2024 and 2025. The way these themes were represented could reflect the political climate during the moment.

- Interviews with people who move or shape wealth: We interviewed 18 people representing 13 organizations in banking, economic development, investing, and philanthropy that are interested in economic inclusion. This was at the end of the project, so we shared the near-final narrative with them and discussed whether and how it might influence practitioners, clients, and others who control or influence wealth.

Limitations and Considerations

As with any research project, this research has limitations and factors that could not be addressed in this project alone. This includes time limitations for field testing, which restricted who we could reach via the avenues we used; the limited inputs we could consider in the narrative scan; and self-selection (rather than random selection) of some research participants, including focus group and rapid test participants. In addition, we modified one of our test narratives midway through testing to incorporate emerging insights, which created some data inconsistencies, but ultimately yielded a more iterative and, we believe, stronger narrative.

We also used AI at two points in our work: (1) we used ChatGPT as one of our inputs in the narrative scan to explore the wealth narratives perpetuated by this large language model, and (2) we used an AI-enabled qualitative analysis tool, ATLAS.ti, to sort sources and complete initial coding of the narrative scan data. Metropolitan Group staff performed spot checks to confirm coding accuracy.

APPENDIX

INITIAL RESEARCH PHASE DETAIL: WHAT BROUGHT US TO THE NARRATIVE APPROACH

In pursuit of its generational goal of economic inclusion for children and families, the Robert Wood Johnson Foundation's Healthy Children and Families team sought insight on how to move beyond traditional wealth-building or wealth-redistribution strategies to create stronger pathways toward economic inclusion for family wellbeing. This project began with Metropolitan Group (MG) and thought partner Social Insights (SI) mapping existing policies, practices, and narratives that sustain the systematic economic exclusion of families (with an emphasis on Black and Brown families), or that challenge the dominant economic system by centering all families through a racial justice lens. Findings from this phase would inform co-creation, sensemaking, and refinement of an approach to identify what economic inclusion would look like from a family-centered design standpoint, and to develop an influencer strategy to advance change.

January to May 2024: We developed a problem statement (i.e., something is limiting the shift from status quo economic justice *tactics* to *transformative approaches*) and research questions, then interviewed three economic justice advocates to learn about their approach to family economic inclusion, to understand any similar research underway, and to hear considerations regarding our work. From there, we refined our questions and built a list of practitioners in the fields of policy, community organizing, community and economic development, advocacy, academia, and philanthropy/impact investing, who were agitating modern conventional thinking on economics and public policy.

June to December 2024: We narrowed our focus to briefly scan alternative approaches, and to center our inquiry on how to elevate and disseminate ideas, narratives, and other opportunities to create the conditions needed to surface the most transformative ideas and approaches. We conducted a literature review and identified a list of potential interviewees that included the following:

- Economic justice advocates and innovators
- Care system advocates and innovators
- Family and child advocates and innovators
- People who have left typical wealth-building programs out of frustration
- Existing movements, intersections, aggregators

We narrowed the list using the following criteria, then began outreach:

- Voices and ideas that have been excluded
- People doing direct work with families and/or in communities, ideally with families in leadership roles
- People interested in research, evaluation, and case/evidence building (including adapting, replicating, and/or scaling promising practices) to advance transformative change

We interviewed eight people in small groups and one-on-one conversations and coded all answers. We also attended the Fall 2024 Healthy Children and Families convening in Detroit and informally explored these questions with participants. We conducted informal conversations with about eight additional informants. Across our inquiry, the topic of wealth sparked rich discussion. Participants often talked about wealth for family wellbeing in two ways: (1) the importance of having ownership, control, or assets to allow choices to come to fruition given the current system, and (2) wealth as a full sense of personhood and wellbeing, including being able to spend time with family and friends, to rest, to remain in their communities. They named a need for clarity around the meaning of wealth, while also noting that it means many different things to many people. To even discuss wealth, they said, we need to help people move from simply surviving to thriving. Thriving means having enough to meet needs and expenses first, as a precursor to beginning to think about approaches to “wealth building” through saving funds or other means.

Participants identified alternative approaches to typical wealth building in both programs and policy.

Programmatic alternative approaches included the following:

- Baby bonds
- Child care tax credit
- Universal basic income
- Guaranteed income
- Options for retirement/savings
- Land trusts/community land trusts/mixed income neighborhood trusts
- Lending circles
- Medical debt and other debt forgiveness
- Structured longer-term communal living
- Worker ownership

Note: Programs that provide direct payments to families must fully trust families’ decisions regarding how to spend those funds, now or as future investments if they choose—and must offer options to facilitate their decisions.

Policy alternative approaches included the following:

- Policy work to fund early childhood issues including child care
- Public banks and other local investment strategies such as community development financial institutions
- Workplace equity
- Economic and land-based reparations

Note: Participants stressed that many promising models exist, but there is no “silver bullet policy,” so a comprehensive policy suite would be most useful.

Participants also mentioned priority strategies to enable transformative actions like these to take hold:

- Shifting to longer-term and flexible funding models that allow for experimentation, long-term change, and evidence building—including a unified strategy among funders that can help shift from scarcity to collective action.
- Building public and political will to dismantle the status quo—including shifting deficit-based narratives around wealth:
 - *Shifting from individual to collective wealth, from wealth to wellbeing*
 - *Interrupting anti-Blackness narratives, including internalized narratives among Black and Brown communities; shifting from disempowered to empowered*
 - *Interrupting narratives of deservingness and the abilities of immigrants and persons experiencing poverty; establishing a long view of what a wellbeing economic system could be if everyone had enough*
 - *Shifting narratives, visibility, and respect for caregiving and other unpaid work/labor/contributions; establishing narratives that hold care and wellbeing as central to wealth*
 - *Altering use of the tax system and our role as taxpayers; the value of public resources and collective prosperity*
 - *Shifting narratives that accept and normalize extreme wealth; de-normalizing billionaires, making wealth disparities unacceptable*
- Transferring leadership to communities most impacted by decisions being made—including support for community organizing, power building, and electoral power
- Considering the impact of climate change on economic inclusion and wealth
- Recognizing that “the master’s tool will not dismantle the master’s house”; capitalism (in any shade) will not liberate us—but there is reluctance to name socialism

We also determined that most participants were not interested in attending a design summit, a key part of our original vision and scope. We concluded these interviews in the run-up to the presidential election, and many participants were overloaded and anxious about what 2025 would bring. They felt they didn't have the capacity to participate in anything outside their organization's focus. Those who were open to the idea were clear that, to be worthwhile, the summit needed to focus on collaborative planning with clear, actionable recommendations and funding commitments.

Simultaneously, an independent Social Insights team, under a separate grant, conducted a landscape scan of what is already happening, or being envisioned, to shift from economic justice tactics (e.g., boosting income in the short term) to transformative change (e.g., building long-term wealth and/or completely rebuilding economic systems). At a high level, it found the following:

- The sectors are engaged in core activities that include narrative work, practice spaces, policy change, and organizing and base building.
- As they engage in their work, players in this space center on lived experience, collaboration, and radical roots.

From these insights, we considered a range of activations that would respond to what we heard from the field and also advance the project objectives, then narrowed the list to two: (1) identify the transformative policy pathways—and necessary enabling conditions—to build collective, generational wealth; and (2) normalize and incentivize community wealth building (and collective wellbeing) by shifting from individual wealth, zero-sum, and deservingness narratives to common good, collective wealth, and abundance narratives, inclusive of conservative/populist contexts. In discussion with RWJF, we decided to focus on narrative change, a consistent theme coming from the fields of family, social, and economic justice; an area of expertise and deep curiosity for our team; and a priority for RWJF. The 2025 phase of this project, detailed in this research report and narrative playbook, focused here.

APPENDIX

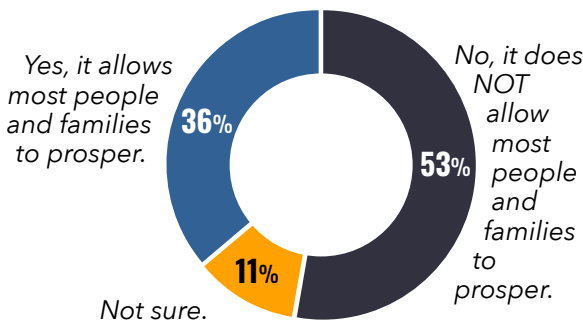
NARRATIVE TESTING DETAILED FINDINGS

1. There is an audience for change.

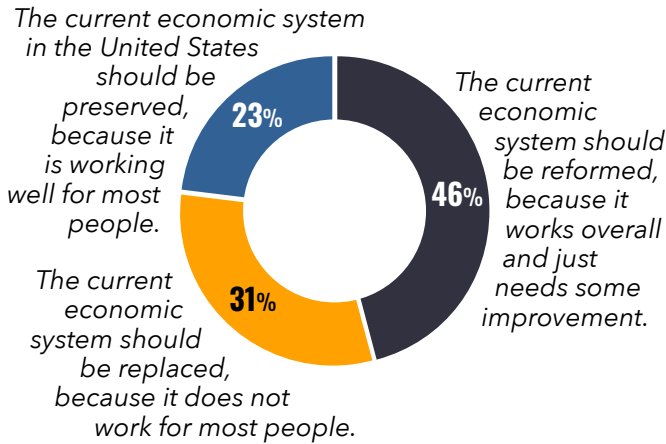
Some organizations working in family and economic justice, including many in the incubator and focus groups, have identified the need to engage a larger audience who have shared values, are deeply dissatisfied with the status quo, and are open to changes. One of our objectives was to identify this broader, “ready-to-engage” audience. (Other organizations prioritize activating their already-committed supporters; they may find these insights useful during times when they need to reach more broadly, e.g., during policy work.)

We prioritized two indicators to identify this larger audience: (1) feelings about how well the current economic system helps families to prosper; and (2) desire to preserve, reform, or replace the current economic system.

A Majority Believe that the Current System Does NOT Allow People to Prosper



Fewer Than One-in-Four Believe the Current Economic System Should be Preserved



About a third of respondents said the system is broken and should be replaced (we’ve called them potential champions). Another third (persuadables), said it is broken and should be reformed—and this group shifts toward replacing the system following exposure to the narratives.

Across these two groups, respondents agree with the narratives (favoring “fair shot”) and support many potential changes to help people prosper from the more well-known approaches (fair taxes, free or affordable health care, living wage, care for

older adults, retirement savings, and training for jobs of the future). Even the more transformative actions we offered (reparations, baby bonds, employee-owned businesses) were supported by at least a third of persuadables.

Audience segment	POTENTIAL CHAMPIONS (28%)	PERSUADABLES (36%)	LIKELY OPPOSITION (36%)
Defined by two key survey responses	Say the current economic system should be replaced AND that it does not allow most people and families to prosper	Say the current economic system should be preserved, reformed, or replaced BUT that it does not allow most people and families to prosper OR they are not sure	Say the current economic system should be preserved, reformed, or replaced AND that it does allow most people and families to prosper
Based on the survey, more likely to	<ul style="list-style-type: none"> • Be age 18 - 34 (GenZ + millennials) • Identify as female • Not be registered to vote • Be African American or Black • Earn < \$50,000 • Not have a college degree • Identify as Democrat 	<ul style="list-style-type: none"> • Be GenX (44 - 60) • Identify as female • Not have a college degree • Be without children under age 18 • Be single • Identify as Independent 	<ul style="list-style-type: none"> • Be millennials (29 - 44) or age 55+ • Identify as male • Be registered to vote • Be white • Earn > \$100,000 • Have 4+ years college • Have children under age 18 • Be married • Identify as Republican
Narrative impact	<p>No statistically significant shift about whether the system allows families to prosper.</p> <p>12 percent of respondents shift from saying the system should be replaced to saying it should be reformed.</p> <p><i>This may be because the narrative reinforces that change is already happening and is possible, so they may become more encouraged about prospects for reform.</i></p>	<p>Became more unsure about whether the current system allows families to prosper (10 point shift)</p> <p>Net positive (by 6 points) shift toward thinking the current system should be replaced.</p>	<p>One in five respondents shift toward believing the current system doesn't allow families to prosper.</p> <p>Net positive (by 7 points) shift toward saying the economic system should be replaced.</p>

2. Both narratives resonated in different ways across the testing methods, leading to a set of core values and effective themes that can create a new narrative.

2a. Both narratives resonated in different ways across the testing methods. Combining elements of the two creates a strong and flexible narrative.

We learned quickly, in the focus groups and rapid tests, that Narrative 1, “More ways to reach the American Dream,” was challenging to test in its entirety because the term “American Dream” was so charged that it dominated the conversation. (See more in Finding 2c.) However, when we isolated the concept (broken system, need for more pathways to prosperity) from the term, participants reported that the narrative felt true and relatable. In rapid tests, it generated robust conversation and shared frustration at how hard it is for most people to get by in a system with clearly visible inequities and barriers. In the open mic rapid test, for example, more of the poets chose to express the American Dream narrative because it resonated strongly with their reality and allowed them to express pain as well as resilience and hope. (Please see SharedProsperityNarrative.com to explore these poems.) Focus group participants agreed with the acknowledgment of the system as unfair or rigged, the ability to collectively create a new dream, and the ability to give all families and individuals a chance to survive (fairness).

In focus groups and rapid tests, participants agreed that “together we thrive” was the more effective narrative for helping people to consider different approaches to economic stability for families and to explore the idea of shared prosperity. In the social media rapid test, which compared engagement with one post on each narrative (shown below), “together we thrive” received 10,300 likes and 120 comments compared with American Dream’s 1,507 likes and 26 comments. For focus group participants, this narrative felt much more aligned with the world they aim to create and with the values of prosperity (wellbeing, economic security), fairness (everyone has a fair shot), and interconnectivity (there is enough for everyone).



Artist Lisa Congdon's articulation of the two test narratives, from her social media rapid test.

The survey told a different story because we modified Narrative 1 to downplay “American Dream.” We tested the narrative using a split sample, where half the respondents saw the term American Dream and the other half saw economic wellbeing, allowing us to isolate the concept from the dominating term. Looking at the two narratives side by side, Narrative 1, whether it used American Dream or economic wellbeing, edged out the “together we thrive” narrative overall, especially among the champions and persuadables. For example,

Potential champions

- Narrative 1 (American Dream, modified): 98 percent totally agree, 74 percent strongly agree
- Narrative 2 (together we thrive): 88 percent totally agree, 55 percent strongly agree

Persuadables

- Narrative 1 (American Dream, modified): 86 percent totally agree, 45 percent strongly agree
- Narrative 2 (together we thrive): 81 percent totally agree, 35 percent strongly agree

In both audiences, respondents ranked Narrative 1 as more relevant, a more persuasive reason to change the economic system, and more reflective of the country they want to live in. Interestingly, both groups ranked Narrative 2 as more believable.

Modifying Narrative 1 during testing creates a limitation, as does the lack of follow-up discussion with audiences to more fully explore why the survey data looked so different. However, we hypothesize that the idea behind Narrative 1, repairing a broken system so everyone has a fair shot, is a more relevant and powerful starting place than Narrative 2, which focuses on collective prosperity. This is consistent with the intention of the incubator group, which created Narrative 1 to be more accessible to the majority they assumed would not be ready to embrace collective prosperity.

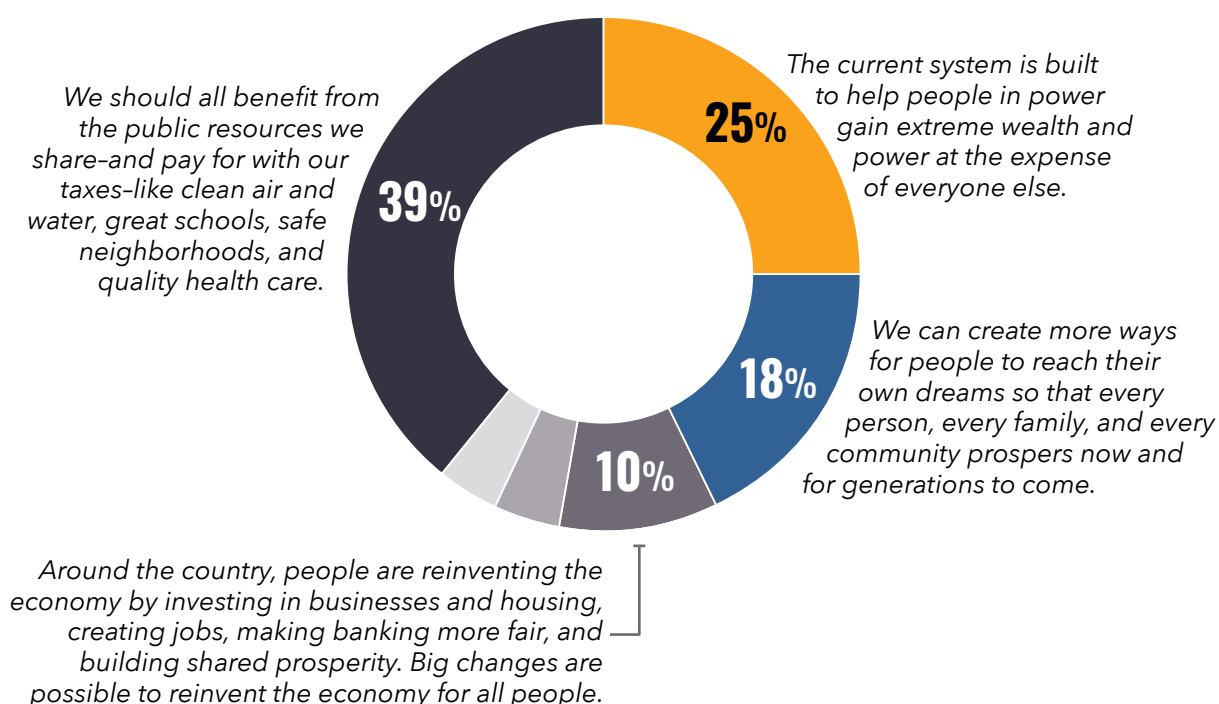
As a result of this, and the message and values analysis that follow, we put the following narrative into the playbook: “It’s possible to create a system where all families have a fair shot at prosperity.” While this can be used verbatim, it is not intended to be a slogan, but rather to be the big idea the narrative seeks to convey. Please see the playbook for more information.

2b. Four components of the tested narratives work powerfully in terms of agreement, persuasiveness, and willingness to share.

To both inform and flesh out the topline narrative described above, we layered in specific message points. Our survey methodology calculated the mix of messages that best engage the intended audience. Below is the formula, and order, that cumulatively reached 90 percent of persuadables. The first message reached 38 percent, the next added another 25 percent, and so on for a total of 90 percent of those surveyed with this message combination—meaning this combination of elements creates a narrative with broad resonance, even among potential opponents.

M3 Reach Analysis - MIDDLE

The optimal four message package reaches 88% of the audience



This map suggests four themes that need to be part of the new narrative:

- 1. Vision:** Starting out with the positive vision helps avoid getting stuck in the current problem. Family was the strongest shared value in testing, so keeping families and children centered in the narrative is critical.
- 2. Shared experience:** There is solidarity in recognizing “so many of us are in this together,” a dominant theme in the rapid testing experiences. Defining the shared obstacle, the system, up front keeps the focus on structural failures and solutions rather than on individuals. This helps negate the shame and blame of existing wealth narratives.

3. Agency and action: Point to tangible and doable actions, even an invitation to look for evidence of change, and then support it.

4. Evidence and hope: Build the case, and spark imagination and hope for change by showing that change is already happening. “Optimism resonates only when paired with clear, concrete steps that feel realistic and strategic,” said one rapid tester.

Informed by all testing methods, the core elements of each theme are outlined below. The messages in the narrative playbook are based on this analysis.

Vision

All people and families should benefit from the public resources we share—and pay for with our taxes—like clean air and water, great schools, safe neighborhoods, and quality health care.

Across all survey respondents, and within persuadables specifically, this message ranks as the most persuasive for why to change the economic system. The original statement started with “We should all” We revised this after focus group and rapid test results showed that this statement of unity is confusing or not believable for many (“Who is we?” many asked), replacing “we” with “all people and families,” a top value across all testing.

We were curious about what term people would use to describe “things tax dollars pay for so everyone in a community can use them freely, like parks, libraries, and roads.” Between public resources, public resources, and public wealth, public resources was the clear favorite, at 67 percent for persuadables (64 percent champions, 62 percent opposition).

Other message points to adapt and potentially integrate into mainstream narrative building include the following:

- We should all benefit from our hard work and share the prosperity we build together.
 - *This is another expression of this idea that tested well as part of the narrative statement.*
- Every family needs prosperity, not just survival. This includes financial security, the ability to create a better future, and equal rights and protections for all people.
 - *These elements of prosperity were chosen most often by survey respondents, so are a relatable way to open a discussion of the end state we seek.*
 - *Articulating the difference between prosperity and survival was a strong theme in rapid tests and focus groups.*

- We found that prosperity is the term that works best across all testing channels. That said, in the survey, wealth and economic wellbeing tested similarly. We recommend using prosperity unless you know your audience.
- All people are worthy of dignity and prosperity. People participate and contribute in many ways, including caregiving and time with loved ones.
 - This idea was prominent in rapid testing, focus groups, and the initial scan of visionary narratives.
 - In the survey, messages that reinforced this concept were among the lowest rated. In definitions of prosperity, economic wellbeing, and wealth, respondents marked “time with loved ones and for the things I enjoy doing” in the bottom three of selected options. In ranking reasons to change the economic system, respondents ranked “Wealth is more than just money. We can change our economic system to redefine wealth to include time for joy, rest, and care” among the weakest reasons.
 - Continuing to reinforce and illustrate this concept is an essential piece in shifting from individual wealth to shared prosperity.
- Families have their own unique dreams (or plans and goals) for today and for future generations. They need many ways to reach their goals, in a system that gives them a fair shot.
 - We originally tested the “dreams” language, and many in the rapid testing and focus groups prioritized this opportunity for families. However, several people mentioned that dreams are optional, and may never be realized, where plans and goals are more concrete. Use what works best for you.
 - “Fair shot” is language that emerged in focus groups and rapid tests.
 - The ideas that every family is different (and there are many ways to define family) and each needs to be able to create and live out their own dream, were prominent in focus groups and rapid testing.
 - Incubator participants and financial security practitioners affirmed that what families need today, in a rapidly changing world, may not be the same things that worked in the past.

Shared experience

The current system is built to help people in power gain excessive wealth at the expense of everyone else. For most people, chasing prosperity has gotten too hard. Families are deferring their plans for the future, and should not have to.

“The current system” is the second most persuasive message in the survey overall and among persuadables. The other two sentences in this message reflect ideas that came up often in rapid test insights about the American Dream.

Of note: This message is the most important message for potential champions, so when talking with known supporters, the narrative can start here.

Other message points to adapt and potentially integrate into mainstream narrative building include the following:

- For many people, the pain of a broken economic system is a daily reality. Some families struggle against barriers that are built in front of them to create unequal opportunity and threaten freedom and prosperity.
 - *This plays on the message “chasing the American Dream has become too hard,” which was frequently echoed in rapid tests and had moderate support in the survey. It also was raised explicitly among many participants in the focus groups. People also talked about the rules of the game constantly changing, so just when someone gets ahead, there’s another hurdle.*
 - *It adds the equity statement, which was a priority in focus groups and rapid tests, informed by literature review sources.¹⁷*
 - *Rapid testers and focus group participants stressed that narratives must acknowledge lived experience, the historical struggle, and pain before offering hope or solutions—both to be more believable and to underscore the opportunity for strength in numbers. They also raised a caution about not over-conflating shared experience, which could gloss over the multiplier effect of structural racism for Black and Brown people.*
- Almost everyone, especially young people, get messages from social media, ads, and entertainment that say excessive wealth is good, and that if you work hard enough you can find it. These messages serve a purpose—to hold an unfair system in place.
 - *This was a prominent idea in rapid tests, supported by reemerging research on “money dysmorphia,” the idea that people, regardless of their objective wealth, often feel they do not have any/enough wealth.¹⁸*
- Families can no longer just “hard work” themselves out of this—and they shouldn’t have to because the system can change.
 - *This is a modification, based on rapid test conversations, of a tested message: “For most people and families, working hard and saving isn’t enough anymore.”*

17. See, [How to Talk About Rigged Systems: A Quick-Start Guide](#). FrameWorks Institute, 28 Jan. 2025; and [Building Connections When Talking About Structural Racism and Health](#). Robert Wood Johnson Foundation, November 2025.

18. “[Secret to Success](#).” Empower. Fielded by Morning Consult, 13–14 Sept. 2024. An online survey of 2,203 Americans, ages 18+, weighted to be nationally representative of U.S. adults.

Agency and action

Most people know the economic system doesn't work for most families, and they want it to change. It will take all of us—people, business, government—but it's possible to create a system where all families have economic wellbeing, now and for generations to come.

This is an amalgam message based on several insights:

- More than three in four people surveyed believe that the current economic system should be replaced (31 percent) or reformed (46 percent), which shows significant appetite for some type of systemic change.
- In the survey, the third most persuasive message with persuadables was: “We can create more ways for people to reach their own dreams so that every person, every family, and every community prospers—now and for generations to come.”
- In rapid tests, people were interested in the “we can create more ways” idea, but asked “who is we?” This revised message clarifies that.

Other message points to adapt and potentially integrate into mainstream narrative building include the following:

- We all do better when we all do better. We all prosper when there are more opportunities for everyone to build wealth across communities and generations.
 - *The majority of survey respondents (75 percent) agree with this statement. Derivatives of this message also resonated in focus groups and rapid tests. (“We” works here because it is more understood to be the global we, all people, versus a more specific but unnamed “we” that is supposed to take action.)*
- In our interviews with people who influence the flow of wealth, many wanted more explicit language about what wealth means for families. Several said they use the functions of wealth from the Aspen Institute’s Financial Security Project:
 - *Resilience*
 - *Investment in mobility*
 - *Intergenerational support*
 - *Mental and physical wellbeing and quality of life*
 - *Ownership, voice, and control over assets and institutions*

Offer the call to action that makes sense for you:

- Look for and support changes that give families more access to wealth now, and that shape a more fair system for the future.

- We shifted here from “Together we can...” language, which focus groups and rapid testers deemed inauthentic and vague. This also tees up an organization to share its approach and layer in others to paint the picture that “change is everywhere and can spread.”

Evidence and hope

Around the country, people are reinventing the economy. Big changes are possible to reinvent the economy for all.

- *They are increasing living wage jobs and affordable housing.*
- *They are making banking and taxes more fair.*
- *They are building employee-owned businesses, creating debt-free education and health care, and more.*
- *(Insert your work or other relevant examples.)*

This is based on the fourth most persuasive message in the survey, across all audiences. We modified the examples embedded in it to incorporate those most intensely supported by potential champions and persuadables, and some that offer more transformative and more collective approaches.

This “proof point” message is vital to bolster the call to action. It can be used as is, or in combination with an organization’s specific message about the actions they are taking. The concept is to normalize the idea that change is actually possible, ending the message sequence with hope, realism, and agency.

If conversation allows, this could also become a question, inspired by the passionate discussions in rapid tests: “If we agree that every family and child should have enough to live well and create the futures they want, how would we get there?”

2c. Sitting between the dominant and visionary narrative and message points are a set of values that can anchor the new narrative in the now and quickly bridge to the transformative direction we seek.

The most effective narratives, those that precipitate action and spark decision-making, are rooted in closely held values. In testing, we tracked alignment with the intended values and coded for emerging values. We arrived at the following values that most resonated across all methodologies and also contained many of the visionary field values:

- **Family** (*Born, created, or chosen—however defined. Respect for ancestors, present day family, future generations.*) Family is the strongest shared value in testing

(survey, focus groups, and rapid testing, and is the central focus of the literature), and a goal of this work is to keep children and families centered in narratives about and approaches to economic transformation.

- **Fairness and equity** (*Everyone has a fair shot, gets what they need, and are not cut off from opportunity.*) In the survey, 75 percent of respondents agreed very much or somewhat that the “fair shot” narrative described the kind of country they want to live in. Focus groups stressed that to be effective, narratives must name what is unfair, how it is unfair, and for whom (which several participants noted is more persuasive than naming the “villains” who are making it unfair), and must name vehicles for illustrating how fairness could look.
- **Interdependence** (*Recognizing both individual and shared responsibility; community, care, and love; could encompass value of hard work and self-sufficiency, belonging.*) Focus group participants supported the statement that there is enough for everyone to thrive (not merely “get by”), and appreciated the examples of times when people come together to support each other. They asserted that one of the hardest concepts to get across to the general public is that all of society benefits when no one is living in poverty.
- **Hope and possibility** (*Generations, future thinking, space to dream.*) In focus groups and rapid testing, participants stressed that people need to see and believe that things can change, and to understand what they can do.
- **Freedom** (*Agency, choice, dignity; opportunity to build a life and future, to build wealth in many ways.*) The importance of building agency in the narrative emerged strongly in the focus groups. People need to see and believe that things can change, and understand what they can do. Freedom is also a “bridging” value centered around choice that appears frequently in narrative and messaging that appeals to a wide swath of the population, including conservatives. In the narrative landscape scan, the comedian Trevor Noah explains “The first thing I learned about having money was that it gives you choices. People don’t want to be rich. They want to be able to choose.”
- **Prosperity** (*Thriving in all dimensions of wellbeing.*) Focus groups highlighted that what prosperity means or looks like may vary greatly (e.g., time, family, community, wellbeing, etc.); the idea is that everyone needs a pathway to prosperity. Prosperity can help bridge to a new narrative by moving people to accept the “shared” component. By focusing on prosperity we leave space for storytellers to customize their stories to specific audiences, and describe the life all families deserve, with financial ease, the ability to dream big, and the freedom to make choices.
- **Security** (*Economic security, better future.*) In the survey, financial security was at the core of two of the three ways that people defined the American Dream, economic wellbeing, and wealth.

3. Prosperity or economic wellbeing are the ideas that most strongly anchor this narrative. *Wealth and American Dream are more loaded terms.*

In the survey, when we asked people to define either “American Dream,” “economic wellbeing,” or “wealth,” they choose very similar definitions for each: (1) providing a better future for my children and loved ones; (2) financial security now and the ability to save for the future; and (3) living in a country where everyone has equal rights and protections.

However, in focus groups and rapid testing, the terms “American Dream” and “wealth” sparked robust conversation—but ultimately limited the ability for the narratives to move people to possibility and agency. By contrast, the terms “shared prosperity,” “economic wellbeing,” or the more colloquial “fair shot” carried similar meaning with less charged connotation and more space for possibility thinking.

American Dream

Focus group participants recognized the metaphor of the American Dream, in theory, as the quest for a better life, for financial security, for the ability to build the future, and for the guarantee of a society where all people live freely. But because of the historical policies, systems, and practices in the U.S., many people are excluded from the dream, especially Black, Indigenous, and people of color. Ultimately, focus group participants raised a serious concern with the term, calling it outdated, aligned with individualism and other harmful mindsets, and off-putting enough that some organizations would not use or support a narrative that includes it.

Similar thoughts emerged in rapid tests, which were at once productive, cathartic, and unifying, but also a painful and harmful reminder of structural racism. While talking about the American Dream generated lively conversation, testers noted that it tended to keep people in commiseration mode rather than turning to solutions and hope.

According to the literature scan, the term American Dream is defined slightly differently based on who is asked. Young Americans often include good mental and/or physical health, financial security and independence, good education, personal fulfillment, and a fulfilling career.¹⁹ Conversely, immigrants from Latin American describe the American Dream as being treated like a human and not just seen as a policy or tax ID number.²⁰ Black and African Americans, in a focus group conducted

19. Durazi, Amaesha, Atlas Burrus, Alisha Hines, and Yalda T. Uhls. [“The American Dream Remains Desirable, but Feels Out of Reach for Generation Z.”](#) Center for Scholars & Storytellers, University of California, Los Angeles.

20. Olivares, Xorje, and Ana De Almeida Amaral. [“Do Latinos Still Believe in the American Dream?”](#) Hyphenación, May 2025, KQED.

by political analyst Dr. Frank Luntz, defined the American Dream as building wealth by reaping the benefits of hard work for yourself and your family, being comfortable and safe, and having the freedom of choice so that no one has dominion over anyone else.²¹ Work Money, a nonprofit that provides financial advice to help working people get ahead, says, “Call us old-fashioned, but we still believe in the American Dream: Hard work should lead to a good life for your family.”²²

Wealth

The term “wealth” also has many meanings and can reinforce existing harmful narratives. In the incubator, focus groups, and rapid testing, participants said the term can create harm and shame for some people, especially those struggling to survive. In focus groups and rapid tests, the term “wealth” made it hard for some participants to see beyond monetary or financial terms. Two representative comments: “When we keep lifting up wealth as something attainable, when so many people don’t have it, it feels like a personal failing and perpetuates harm.” “When I think of wealth, I think of individuals, [the TV show] Succession, the ultrarich. When I think of prosperity, I think of doing well, families doing well, communities doing well.”

Resources from the literature review have reimaged what wealth means for many individuals and families. In her TED Talk, “[What Does ‘Wealth’ Mean to You?](#),” Aisha Nyandoro describes redefining wealth from “lavish lifestyles to fulfilling basic needs and dreams, illustrating the power of financial agency.” In “[Fighting for a Future That Honors Everyone’s Humanity](#),” Dr. Laura Gerald writes that people describe wealth as no one going hungry, families having access to affordable child care, and later, high-quality public education, and having access to affordable health care that will not put them into deep medical debt.

4. A significant majority of people support changing or replacing the system, look to the federal government as a key lever for change, and prioritize a handful of actions—which provide a helpful starting point.

The survey offered respondents a range of changes that could make it possible for more people and families to prosper. How people ranked those changes provided insights into which examples offer a reliable starting point to bring new audiences into the conversation.

21. Luntz, Frank. “[‘System Is Rigged’: Black Americans on the American Dream](#).” Straight Arrow News, 27 Nov. 2024.

22. [WorkMoney](#). “We are a nonprofit working with people to save more and live a better life.”

Actions supported across all three audience segments at an average 70 percent or higher.

Think of these as the “bellringer” policy changes that can be used to start a conversation with people across the political ideological spectrum about ways to change the current economic systems so more families can prosper.

- Fair taxes, where everyone pays their fair share (79 percent average support across the survey sample)
- Job training for the jobs of the future (79 percent)
- Ways for more people to save for retirement (79 percent)
- Affordable ways to take care of older adults at the end of life (78 percent)
- Free or affordable health care, without medical debt (77 percent)*
- A living wage for everyone (75 percent)
- Fair and welcoming banking, with low fees and rates (72 percent)*

** While support among potential champions for both policies was about 90 percent, and about 80 percent for persuadables, it was much lower among the likely opposition (65 percent and 62 percent, respectively) although still supported at strong levels.*

The strong support for these kinds of solutions, which largely rely on policy, may explain why respondents named the federal government as being the most responsible for the broken system, and holding the greatest responsibility to take action.

Actions with 50 percent to 69 percent support across all three audience segments.

Support for these policies is consistently higher among, Black or African American, Latino/Hispanic, and American Indian or Alaska Native respondents, and is generally higher among 18 to 34 year olds. These are still fairly reliable examples, but may need more explanation.

- More opportunities to own a home, or to build wealth through renting (68 percent average support across the survey sample)
- Free or affordable higher education, without debt (66 percent)
- Free or low cost child care (63 percent)
- Tax credits that benefit families with children (60 percent)
- Making it easier for people to start their own business (58 percent)
- Ways to build wealth together, like through employee-owned businesses (53 percent)

Actions with 30 percent to 49 percent support across all three audience segments.

These reflect more innovative, transformational solutions, and support is much lower than for the others. They may not be the best starting-point examples to use with new audiences. For example, there is a 14 point drop between “ways to build wealth together” (53 percent) and “baby bonds or savings accounts for all children” (39 percent). The data suggest these actions would be most popular among 18 to 34 year olds, those with household income below \$50k, and those identifying as Black or African American, Latino/Hispanic, or American Indian or Alaska Native.

- “Baby bonds” or saving accounts for all children (39 percent) (note that 42 percent of the likely opposition supports this change compared with 36 percent of persuadables and 39 percent of potential champions)
- Paying reparations to repair the damages done to Black and Indigenous people (35 percent)

It’s worth noting that even these two more transformative ideas garner support from a third of respondents. The champions and persuadables offer a significant opportunity to advance wealth-building policies and, through narrative shift, to build increased awareness of and support for more transformative ideas.

5. Public resources need to be included in both the definition of prosperity and in changes to systems to advance economic wellbeing for children and families.

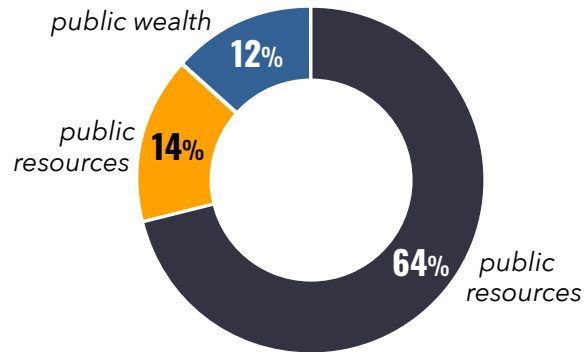
Survey respondents understand and value the concept of public resources, and when asked, agreed that public resources are important elements of prosperity. Healthy and safe communities, access to health care, and caregiving surfaced often in the rapid test. However, current dominant wealth narratives perpetuate individual responsibility and often do not include public resources. A robust set of public resources invests the taxes created by collective contribution into collective wellbeing. It shifts the expectation from solely individual input, merit, and benefit to shared contribution and shared thriving. Ideally, public resources would include benefits already expected in the United States (education, clean air and water, public safety, parks, etc.) as well as a more robust care system (child care, care for older adults, health care).

This puts public resources squarely at the intersection of two important economic reforms that benefit children, families, and all people: (1) creating a more equitable way to collect and invest taxes, and (2) building a care economy where caregivers are valued and care services are available as a public resource.

The survey provided insights on how to talk about public resources and build the case for more robust resources as part of shared prosperity.

“Public resources” is the best term to describe these shared assets.

How do people describe things tax dollars pay for so everyone in a community can use them freely, like parks, libraries, and roads?



Survey respondents value public resources.

- Top ranked survey message: We should all benefit from the public resources we share—and pay for with our taxes—like clean air and water, great schools, safe neighborhoods, and quality health care.
- Most supported changes to improve economic wellbeing: Fair taxes (79 percent of all respondents). Other supported public-good-aligned changes included child care, health care, retirement savings, and tax credits for families.
- The sector most responsible for taking action so people can prosper: the federal government (45 percent of all respondents).

6. Showing how the system is broken, and the impact, is more compelling than blaming someone for breaking it.

FrameWorks Institute says that rigged system framing,²³ helps reinforce how systems work, and can lessen or prevent placing blame on individual communities or groups of people for not achieving wealth within a system that currently works for some but not all people. If it’s necessary to name a villain, the report suggested, blaming a group of people is more effective than blaming individuals.

This was echoed in focus groups (and in the narrative incubator), where participants shared that villainizing billionaires or even corporations can backfire because people aspire to be wealthy and want to keep that pathway open for themselves one day. Some focus group participants also shared that talking about *who* broke the systems is less effective than describing *how* systems are broken. They found that people

23. [How to Talk About Rigged Systems: A Quick-Start Guide](#). FrameWorks Institute, 28 Jan. 2025.

feel less fatalistic about possibilities for change if they are clued into how the system is rigged and how it might be unrigged. Examples from focus group participants include the following:

- Public dollars (e.g., taxes, fees that cities accrue) sit in private banks and spur private profit rather than building wealth for the communities the money came from. A solution could be to create policies that reinvest the dollars in the communities to build infrastructure or schools.
- Four to eight million people in California don't have access to basic banking. They rely on payday lenders; consequently, the people getting gouged are those who earn the least. They aren't making bad choices; the banking system is not built for everyone. Therefore, we need public banks so families and low wage workers can access this essential public good.

Establishing that people rigged the system (rather than it happening organically) also sets up the opportunity to show how people can fix it. In a 2023 messaging guide on [Structural Racism and Health](#), the Robert Wood Johnson Foundation stated, "Since people created the laws and social practices that shape these opportunities, we can reinvent them." This guide also provides insights for naming structural racism as the cause for the broken system, for organizations that are ready to have that conversation.

Financial security interviewees stressed the need to name how every sector—government, banking, corporations, media—has a hand in creating new pathways and systems. Several cautioned against narratives that seem to blame banks more than others. While this pressure may be effective, it can also be alienating and create defensiveness.

7. Sharing examples of changes already happening is essential for helping people to envision what could happen, see that it's real already, and believe that more could be possible.

Aside from the actions provided in the survey, people aren't sure what can be done. Of the survey's 39 write-ins, most were variations on the list; the exception was six mentions of government accountability issues such as fair elections and more transparency.

Because existing wealth narratives are so ingrained, and reinforced every day by experiences, media, and entertainment, it's easy for people, even those committed to family and economic justice, to fall into status quo ideas and actions. One of the rapid

test teams, who created a game where players experienced the broken system, was surprised to see progressive players struggle to drop their competitive, individualistic ideas to embrace cooperation and collective solutions. This reveals that the sentiment runs deep.

In rapid testing, the narrative sparked conversation and prompted people to say: “OK, I’m with you, but how would this happen, what would be different, what can I do?” This is the reaction we want a narrative to prompt, because a narrative is about a big idea, not a specific policy platform. At the narrative level the goal is to open people to the idea of changes and motivate them to ask activation questions (e.g., how, who, etc.).

With people engaged and curious, organizations are teed up to make the case for their action or policy. Storytelling can help break out of that status quo thinking by challenging people to think creatively about different solutions and a different future. And by linking to the narrative and other action happening across the country, they give evidence that their work is not isolated; it’s growing and can become the new normal.

“I find that a lot of narratives miss this part. ‘We can change this,’” said a rapid tester. “Giving people a sense of what they can do and how they can do that, I think is a really critical aspect of this work.” Before people can take action to make change real, they first have to believe that new possibilities and new ways of thinking exist.

Some examples from rapid testing and interviews?

- Big changes in a crisis provide proof that transformation is possible. For example, “We gather around our neighbors during natural disasters, sickness, and loss. This doesn’t have to happen in just a few places, or only in an emergency. It can be the way we do things every day and everywhere.”
- Showing the path from known to transformative. For example, “In many communities, changes are happening so more families can own homes, start businesses, and build wealth in tried and true ways. That’s all important and makes a difference for families. And we also need new ways to build wealth in today’s reality. We need ways that we can build wealth together, for all, not just for a few.”

8. There is also an opportunity for a new narrative to influence practices in the financial and philanthropic sectors.

As a final phase in our narrative testing, the Healthy Children and Families team asked us to explore whether and how narrative change might impact the field that controls the flow of wealth through investments, product and service design, and thought

leadership and influence. We interviewed 18 people representing 13 organizations working toward economic inclusion in banking, economic development, investing and/or investment advising, and family philanthropy.

The people we interviewed were generally aligned with our new narrative in the words they use on their websites and in conversation.

They are constantly fighting intentional, fiercely reinforced individual and meritocracy wealth narratives and related practices in their field, in their organizations, with their clients, and among influencers. One of our interviewees summed this up: “This (new) narrative is excellent because it’s true. So many people hope a better system is possible but are being told ‘that’s not how it’s done, it won’t work, you don’t know enough.’” When I tell them they are not alone, aren’t crazy for thinking a better system, society, just world is possible, they start to cry. Even then, they’re still replaying the messages: ‘you’re looking for Shangri-la, not living in the real world, it won’t work.’ But it can. There is a different way, different systems, already working. People need to see the solutions, hear examples they can understand.”

We heard this repeatedly from wealthy individuals, investment advisors, people working in banks, and organizations working to shift the flow of wealth. This is especially true, they said, for younger philanthropists (either next-generation stewards of family wealth or new-wealth holders), who start out idealistic but are quickly called back by advisors, trustees, and others who say, “You can’t do that, they’ll take all your money.” It takes strong conviction, a solid mission, and dedicated leadership to break this. Several interviewees talked about peer networks of philanthropic families supporting each other in this work.

One significant challenge involves long-held and harmful assumptions about creditworthiness and collateral, particularly among borrowers of color, driven by biases, structural barriers, and systemic racism. Other beliefs and practices hold individualism and meritocracy in place within the field, such as people in the system who aren’t motivated to change the system they’re in; private equity and mergers, which are divorced from real-world impacts; backward looking training materials for the field ripe with racial biases; lack of cultural awareness or experience beyond wealth by people in the industry; metrics that do not account for realities and often demand results on too short of a timeline; banking not understood as a system or public good, within and outside the banking field; fear of looking weak or having made a foolish decision with money; lack of resources for innovation.

Some people in these fields see their potential to shift the narrative, and want to do so. The new narrative has promise, with more specificity about what’s already working

and more on why wealth matters for families. Participants talked about socializing this narrative, so it grows and blocks out others. They see that they are the niche pioneers with reach to influence others in the field. “My dream narrative for the sector is something like: ‘Changing your institution’s practices is possible; it’s already changing for the better (despite what you see), and it’s easier than you think.’ Then, we need the proof that shows optimism and ease while also being pragmatic.”

Any skepticism in the narrative is centered in the need to move beyond platitude to name tangible examples of what’s working now and what else, besides the status quo, is possible, “the how.” (We agree; that’s the role of narrative activation and story building around the narrative.) Case studies aren’t readily available and developing them is especially challenging when there is “so much energy in burying this solution set,” and in current reality, where no one wants to stand out and potentially become targeted. The solution sets they go to center on expanding credit and access to capital, investment, and assets—rather than changing policy, systems, and culture. This is not a surprise, given their sector and their role in creating new models for moving money. But it means that they unintentionally reinforce individualism. Only two participants talked about meeting both immediate, direct services needs and also pushing into system change. A significant opportunity exists to help people in this field see their interest and potential not only in scaling and transforming banking structures and products, but also in advocating policy and system shifts that would significantly impact family wellbeing and change the enabling environment for their core business. About half talk overtly about racial justice.

The idea of “the system is rigged or broken” resonates. But, as with the focus groups, people have different perspectives on how the system is broken and by whom, and whether and how to name this. Some said the sector needs to be called in, not called out or villainized. Others encouraged more overtly naming financial institutions that have control over how financial resources are distributed, or pointing out that employers can be more active participants in the financial wellbeing of workers beyond income. They wanted mention of what the private sector needs to do.

Radical change may happen as a matter of circumstance or reality; we need to be ready when it comes. Two participants commented that all the work to shift systems may pale in comparison with major fissure that will force change. (We heard this in focus groups too, about planning for the breaks to come.) This may result from the massive income and wealth decline among Gen Z, stemming from larger forces that then put pressure on community solutions for recovery, or from some other force.

The field would benefit from help with organizing, movement building, storytelling, narrative shift, and power.

APPENDIX

RESOURCES CONSULTED

During the first phase of this project, we conducted a literature scan to understand existing research and narratives on wealth and related topics. This is a rich field of research (our initial list exceeded 130 sources) and we narrowed in on those most focused on talking about the economy and poverty. We continued to read and consider additional resources throughout the project in our effort to be additive to the existing literature and field. We reviewed the following sources and offer them here in acknowledgement and as a strong starting list for other work.

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All resources available at
SharedProsperityNarrative.com



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