Mission:

Crittenton Women’s Union transforms low-income women’s lives through innovative social service programs, applied research, and effective advocacy so they and their families can attain economic independence.
The Bridge to Self-Sufficiency®

CWU’s theory of change, the Bridge to Self-Sufficiency®, offers a solution. It is a brain science-informed coaching framework that helps family members to better analyze their choices, set goals, access community resources, and persist to achieve success. In this way, participants are better able to overcome the obstacles that bind them to poverty.

The Bridge guides low-income women toward economic independence by developing skill sets based on the following five areas:

- **Family stability** – Creating a stable, supportive environment for their children and themselves,
- **Well-being** – Developing and sustaining good health in the entire family,
- **Education and training** – Focusing on learning that will lead to careers that can sustain a family,
- **Financial management** – Saving money, staying out of debt, and planning for the future,
- **Employment and career management** – Building careers that will help them move their families out of poverty and into the middle-class, today, and for generations to come.

Mobility Mentoring®

Building momentum across the Bridge

What helps the women we work with to successfully cross the Bridge to Self-Sufficiency is our highly acclaimed, results-oriented personalized coaching system called Mobility Mentoring®. Throughout Mobility Mentoring, professionally-trained staff members create strong partnerships with low-income women and work with them as needed until they acquire the resources, knowledge, and skills to successfully achieve across the five pillars of the Bridge and cross over into a life of economic independence.
Dear Friends,

It gives us great joy to share Crittenton Women’s Union’s 2014 Annual Report with you. On the pages ahead, you will read about the remarkable accomplishments of our families, and how their successes are inspiring others to disrupt the cycle of poverty using CWU’s tools and approaches. Momentum is rising, carrying our participants toward economic security, and this organization to places we could only imagine just a few years ago.

This progress is directly tied to the accomplishments of hundreds of CWU participants, and the commitment each woman has made to creating a better life for her children and herself. Rooted in emerging brain science, CWU’s theory of change, the Bridge to Self-Sufficiency®, and our Mobility Mentoring® tools, provide individualized goals and strategies that lead to financial independence. As a woman realizes her unique goals defined by her Bridge assessment, a sense of triumph and self-worth motivates her toward her next set of goals, and ultimately, a family-sustaining wage.

Our participants’ successes using the Mobility Mentoring platform, the effectiveness of our advocacy efforts, and our comprehensive data-driven research have attracted an array of partners equally dedicated to eradicating poverty. It is an honor to work with organizations of the caliber of the Robert Wood Johnson Foundation, the Aspen Institute, the Harvard Center on the Developing Child, and the Annie E. Casey Foundation. By joining together with these talented collaborators, we will bring Mobility Mentoring approaches to more people and places across the country and around the globe.

All this is possible thanks to generous investors who have aligned behind our efforts, a Board of Directors which thinks boldly, and smart, compassionate staff members and program volunteers who instill hope and dignity at times when our participants need it the most. The collective capabilities of these individuals and the unwavering determination of our participants are a force – a source of strength delivering proven solutions to one of the most challenging social issues of our time.

On behalf of everyone here at CWU, thank you for your foresight and belief in our mission to help families live, work, and thrive.

With gratitude,

Elisabeth D. Babcock, MCRP, PhD    Heidi Brooks
President and Chief Executive Officer    Chairwoman
Program Partners

Advancing our results onto a national stage

CWU’s President and CEO, Beth Babcock, was invited to testify before the Robert Wood Johnson Foundation’s Commission to Build a Healthier America where she outlined the breakthrough results of Mobility Mentoring®. Beth addressed a national audience that included policymakers, advocates and economic experts and discussed how low-income families can navigate the stickiness of poverty using brain science-informed tools and models. CWU’s Career Family Opportunity (CFO) program was highlighted as an example of such a model that has produced significant outcomes in educational attainment, financial repair and savings, and employment gains for families that began with limited education, little to no savings and unstable employment histories.

This testimony advanced CWU’s work further into the national spotlight and raised the organization’s profile as a leader in fighting poverty. Additionally, the outcomes of Mobility Mentoring, which exceed national benchmarks, were incorporated into the Commission’s “Time to Act: Investing in the Health of Our Children and Communities” report that issued new recommendations for improving people’s health, including eliminating poverty.

Research and Innovation Partners

Sharing the science behind our results

With support from the Annie E. Casey Foundation and the Center on the Developing Child at Harvard University, CWU produced, “Using Brain Science to Design New Pathways Out of Poverty.” This research report, authored by Beth Babcock, highlights how new findings in brain science can be used to improve anti-poverty approaches, and offers the design and outcomes of CWU’s programs as a successful case example. Since its release in February 2014, this peer-reviewed white paper has served as a platform to guide the considerations of policy-makers, advocates, and other organizations pursuing solutions to end poverty. It also garnered national media attention and was the basis of Beth’s popular TEDx Beacon Street talk.

Advocacy Partners

Achieving results through policy changes and increased funding to end poverty

Together, CWU and the Workforce Solutions Group advocated on behalf of low-income individuals and families throughout the Commonwealth of Massachusetts. This partnership secured $12 million in state funding to improve and increase training opportunities designed to help low-income individuals secure jobs that pay a sustaining wage.

CWU also teamed up with an array of organizations serving the state’s homeless population to secure a $7 million increase in rental assistance in the Commonwealth’s budget. This additional funding will make more affordable housing available, and provide added support for low-income families working toward economic independence.
Career Family Opportunity Participants Achieving Outstanding Results

Celebrating Norma Fajardo-Huard, CFO Peter Zane Fellow and LaShauna Walker, CFO Pamela Murray Fellow

From the moment Norma Fajardo walked into her subsidized apartment, she knew she had to get her son and herself out of public housing. For LaShauna, it was a serendipitous piece of paper she picked up on the “T,” advertising “Career Family Opportunity (CFO)” at CWU. Back in 2009, both women were living below the poverty level, and looking fervently for opportunities to help them create better lives. These two random occurrences inspired Norma and LaShauna to seek out CFO, and to begin their unique journeys on the Bridge to Self-Sufficiency®.

Fast forward to Spring 2014: each woman can now reflect on the progress her family has made. At times, the challenges seemed insurmountable, yet, with each step, they built the forward momentum that made their setbacks become increasingly navigable. Today, Norma and LaShauna have fulfilling careers that provide family-sustaining wages. Norma is employed at Senior Whole Health, and LaShauna works at Northeastern University.

Norma’s and LaShauna’s commitment and progress haven’t gone unnoticed. Pamela Murray and Peter Zane, two senior CWU board members with long records of service and generosity, were so impressed with Norma’s and LaShauna’s powerful record of accomplishment that they each chose to invest in the CFO program. Pam and Peter saw their gifts as both an endorsement of CFO’s mission and results and as a challenge to other donors to build on and magnify CFO’s successes. Pam, like CWU, leads with a bias for action and results. She called her gift not only a recognition of CWU’s progress, but also a powerful personal way to honor her mother and sisters. “My mother’s and my sisters’ encouragement and wise counsel gave me the strength to follow my dreams,” Pam said. “I’ve always drawn on their gifts to me, as we all do when we know someone cares. LaShauna knows I care about her. I’m proud of all she has done and I hope and trust my family’s gifts to me – and Peter’s and my gifts to CWU – will be paid forward by LaShauna and the women who follow her.”

“LaShauna knows I care about her. I’m proud of all she has done and I hope and trust my family’s gifts to me – and Peter’s and my gifts to CWU – will be paid forward by LaShauna and the women who follow her.”
Momentum on Growth through Partnerships

The early results are in, and the progress CWU families are making is quite impressive. Their journey toward economic independence positions CWU to share our theory of change, the Bridge to Self-Sufficiency®, and our Mobility Mentoring® platform with audiences far beyond our Massachusetts borders.

Over the past year, more nonprofit organizations, think tanks, and government agencies from around the globe have turned to CWU looking for solutions. Each organization draws upon our evidence-based results to help individuals and families in their cities and towns create changes that will help them join the middle-class. These partner organizations then share their findings, while also influencing public policy and affecting anti-poverty research at the national and international level.

Public Partners
Growing our impact with government partnerships
CWU works closely with the Massachusetts Department of Housing and Community Development (DHCD) to understand the value and outcomes of economic mobility programs. The DHCD has allotted $8.1 million in funding to create a five-year pilot program that will bring economic mobility services, based on CWU’s comprehensive model, to the residents of the Commonwealth’s public housing developments, as part of its Mass Learning, Employment, and Assets Program (MassLEAP) initiative. CWU was awarded two of these programs that will provide its Mobility Mentoring® program and services to even more residents living in the state’s public housing developments or with state-funded vouchers in Boston, Braintree, Quincy, Watertown and Worcester.

Program Partners
Growing our influence with national partnerships
CWU was named a member of the Aspen Institute’s Ascend Network, a 58-member collaborative committed to using an intergenerational (two-gen) approach designed to disrupt the cycle of poverty for families. The two-gen approach expands upon CWU’s theory of change by actively engaging both the parent and the child(ren), weaving together each family member’s unique pathway toward economic mobility and educational success. CWU will also draw upon the expertise of the Center on the Developing Child and Nurtury to pilot implementation of this “whole family” approach to economic security.
Growing our reach through shared learning

Keeping in line with our “action tank” model, CWU remains committed to sharing our learnings on a macro level. Beginning in 2011, CWU began distributing Mobility Mentoring® results among others working to end homelessness and helping low-income populations. To keep information channels open and flowing, CWU held its second biennial learning conference in April of 2014. “Disrupting the Poverty Cycle: Emerging Practices to Achieve Economic Mobility 2014” brought together more than 350 social service providers, academics, policy makers, researchers, financial experts, philanthropists, and participants to brainstorm and share cutting-edge solutions to help low-income families move up the economic ladder.

These successes have drawn inquiries from across the US and beyond, motivating CWU to launch the Economic Independence Exchange (EIE) in February 2014 as a means to help like-minded organizations adapt the Bridge to Self-Sufficiency® in ways that achieve outstanding results for their participants.

By June 2014, 22 organizations from the United States, Canada and Australia had joined the EIE. Members participate in monthly webinars on topics they request, receive call-in technical assistance, have access to a Google Group web-platform for timely sharing of questions and resources, receive regular newsletters that include helpful resources and learning opportunities, as well as discounted rates for technical assistance and training provided at members’ locations, and training and conferences held by CWU. 

Sharing Solutions across the Country: CWU and Hope SF

Hope SF is San Francisco’s first large-scale public housing revitalization project to prioritize current residents while also investing in high-quality, sustainable housing and broad scale community development. In one of its most challenging neighborhoods, Southeast San Francisco, Hope SF will create thriving, mixed-income communities that provide residents with healthy, safe homes and the support they need to succeed.

A major part will be Hope SF’s onsite resident services that will provide opportunities to the residents who have struggled for generations to break out of the cycle of poverty. After learning about CWU’s work and results, Hope SF plans to use CWU’s Mobility Mentoring® approaches and tools to improve and better integrate their services for residents.

Ellie L. Rossiter, Initiative Officer and Campaign Director of Hope SF, says, “Mobility Mentoring and The Bridge resonate with our administrators and direct service providers alike because they are consistent with our commitment to leadership development, community building, trauma-informed practices, and taking a multi-generational approach across several domains at once – education, health, housing, workforce, safety and community building.”

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1 CWU’s 2013 Hot Jobs 2013 report is CWU’s triennial survey of the Massachusetts labor market to identify career paths that lead to economic self-sufficiency. For more information visit www.liveworkthrive.org

2 CWU’s 2013 Massachusetts Economic Independence Index is a basic needs budget calculated for various household compositions based on their unique basic needs cost for each county in Massachusetts. For more information and access to the Economic Independence Calculator, visit www.liveworkthrive.org
“CWU’s goal is to use this impetus to grow our impact and generate even greater results to move more families out of poverty.”
Nearly a decade ago, Crittenton Women’s Union had a vision to change the course of life for Boston-area women living at or below poverty level. Within the organization, we knew we had to build upon our solid grassroots direct-service programs by accelerating our research and advocacy initiatives. Today, these three distinct focus areas energize our advancement, and allow CWU to expand its vision.

CWU’s goal is to use this impetus to grow our impact and generate even greater results to move more families out of poverty. Built upon the foundation of success our Boston area participants have achieved, CWU continually develops, uses, and shares innovative tools and holistic programs through metrics, science, and our day-to-day work with families committed to improving their lives.

This journey will lead CWU toward new, large-scale opportunities.

**Programs** – CWU will have the opportunity to increase its influence and expand learning through additional partnerships and testing of new tools and models. Local, state and national partners offer creative platforms to design and implement the Mobility Mentoring® framework with whole families interested in improving economic mobility for parents and educational success for their children. Outcomes from these models will have implications for research and broader public policies impacting low-income families.

**Advocacy** – To end poverty today – and for future generations – we need to develop public policy measures that dedicate the funding, support systems, and time needed to create economic mobility and stability in low-income families. CWU’s Advocacy staff will be leading this effort by introducing legislation to help more low-income families to enter the middle-class, sharing our evidence-based research with elected officials, government agencies, and others dedicated to moving families toward financial stability.

A little-researched and underappreciated barrier to economic independence is consumer debt, often brought on by student loans owed to for-profit colleges. CWU is working to build awareness around harmful recruitment and lending practices and to create changes within these for-profit educational institutions, through governmental oversight.

**Research and innovation** – To truly understand why low-income families remain mired in poverty and how they can achieve economic mobility, CWU takes a fact-based, research-driven approach.

Science and data shape our collaborative work to break the intergeneration cycle of poverty for families. CWU uses the latest research on the brain to better understand the effect of poverty on the executive functioning of developing minds and how these skills can be fostered in adults through approaches like our Mobility Mentoring system. CWU will grow its network and join with global pacesetters to share what we are learning worldwide and connect program leaders, policymakers, government agency heads, and advocates to develop and use CWU’s approaches to end poverty in their own communities.
Education and Training:

2009: 1% of all CWU adult participants started a new education or training program while engaged in CWU programs.

2014: 45% of all CWU participants started new education or training programs while engaged in CWU programs.

45% of all participants were enrolled in an education or training program, and of those, 43% are enrolled in an associate’s, bachelor’s or graduate degree program.

Did you know?
Earning an associate’s degree increases earnings on average by 13-22%.

College graduates are 5.3 times more likely to leave the bottom quintile than non-graduates.

Who We Serve:

1274 program participants:
765 Adults, 509 Children, 437 Families

74% of participants are enrolled in school OR employed
22% are enrolled in school AND employed
93% of all adults served are women
89% of parents are single parents

Financial Management:

2009
20% of all residents in CWU emergency housing programs developed a household budget. And two guests (less than 1%) maintained the budget by increasing their savings and making debt repayments.

2010
52% of all residents in CWU emergency housing programs developed a household budget and 18% of them reported increasing their savings.

2011
74% of all CWU adult participants have developed a balanced spending plan. And 63% reported an increase in savings.

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1 Karpilow, Quentin and Richard Reeves. Community College May Hold the Key to Social Mobility. Brookings Institute, Social Mobility Memo, October 2013.
67% of all CWU adult participants have developed a balanced spending plan. And 66% reported an increase in savings.

2009: 3% of all CWU participants started new employment while engaged in CWU programs.
2014: 23% of all CWU participants started new employment while engaged in CWU programs.

56% of participants are employed

Employment:

Average hourly wage of employed CWU participants $11.52

Massachusetts Minimum Wage $8.00 per hour

How do we compare?
Nationally, 29% of homeless families are employed

3 National Center on Family Homelessness, Fact Sheet on Families and Homelessness, 2014.
Every effort has been made to ensure accuracy and we sincerely regret any errors or omissions. If an error has been made, please contact the Institutional Advancement office at 617.259.2921.
We are grateful for the extraordinary generosity and ongoing support of our donors for the fiscal year beginning July 1, 2013 and ending June 30, 2014. Donations of $100 or more are listed below.

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Daniel Gottlieb
Edward C. Gray
Emily S. Greenstein
Jean L. Guttmann
Alice W. Hall
Susan Hall
H. P. Hanna
Kurt E. Hanson
Pamela Hawes
Eileen Hayes
Elizabeth P. Heald
Robert Holdway
Lewis Holmes
Kevin G. Honan
Gail E. Horowitz
Leigh Hurd
Eleanor E. Iselin
Stuart Jacobson
Helen L. Johnstone
Denise Jolicoeur
Diane Julian and Joseph Quinn
Alan T. Kent
Katherine F. Kopp
Beth B. Kramer
Sabrina Kurtz-Rossi
Crittenton Women’s Union
Statement of Financial Position

<table>
<thead>
<tr>
<th>Assets</th>
<th>As of 6/30/2014</th>
<th>As of 6/30/2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Assets</td>
<td>$1,669,386</td>
<td>$1,815,689</td>
</tr>
<tr>
<td>Investments</td>
<td>$6,519,209</td>
<td>$5,957,250</td>
</tr>
<tr>
<td>Property, Plant and Equipment, Net</td>
<td>$3,735,141</td>
<td>$3,978,670</td>
</tr>
<tr>
<td>Total Assets</td>
<td>$11,923,736</td>
<td>$11,751,609</td>
</tr>
</tbody>
</table>

Liabilities and Net Assets

<table>
<thead>
<tr>
<th>Liabilities</th>
<th>FY14</th>
<th>FY13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Liabilities</td>
<td>$868,992</td>
<td>$860,320</td>
</tr>
<tr>
<td>Total Liabilities</td>
<td>$868,992</td>
<td>$860,320</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Assets</th>
<th>FY14</th>
<th>FY13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted - Undesignated</td>
<td>$2,372,341</td>
<td>$2,543,638</td>
</tr>
<tr>
<td>Unrestricted - Board Designated</td>
<td>$3,195,381</td>
<td>$2,265,301</td>
</tr>
<tr>
<td>Temporarily Restricted</td>
<td>$3,364,073</td>
<td>$2,999,401</td>
</tr>
<tr>
<td>Permanently Restricted</td>
<td>$2,122,949</td>
<td>$2,082,949</td>
</tr>
<tr>
<td>Total Net Assets</td>
<td>$11,054,744</td>
<td>$10,891,289</td>
</tr>
</tbody>
</table>

Total Liabilities and Net Assets $11,923,736 $11,751,609

FY14      FY13
Operating Revenue
Program Service Fees $7,638,733 $7,323,529
Gifts and Grants $1,574,490 $1,820,179
In-kind Gifts $160,895 $162,233
Investment Income Appropriated $579,700 $245,100
Other Income $170,812 $66,508
Total Operating Revenue $10,123,838 $9,617,549

Operating Expenses
Program Services $8,592,508 $7,948,287
Management and General $1,325,511 $1,440,889
Fundraising $521,177 $610,583
Total Operating Expenses $10,439,194 $9,999,759

Change in Net Assets from Operating Activities ($315,357) ($382,210)

Discontinued Operations $0 ($88,877)
Change in Net Assets from Non-Operating Activities $74,140 $303,111
Change in Temporarily Restricted Net Assets $364,672 $107,168
Change in Permanently Restricted Net Assets $40,000 $0
Total Change in Net Assets 163,455 ($60,808)

Sources of Operating Funds: $9,797,039
- FEE FOR SERVICE 8%
- GIFTS AND GRANTS 17%
- INVESTMENT INCOME AND OTHER 7%
- GOVERNMENT SUPPORT 68%

Use of Operating Funds: $10,439,194
- RESEARCH AND ADVOCACY 6%
- MANAGEMENT AND GENERAL 13%
- FUNDRAISING 5%
- PROGRAMS 76%
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Lauren A. Smith, MD, MPH  
Vice Chair
Michael J. Poirier  
Treasurer
Leah Sciabarrasi  
Clerk
Elisabeth D. Babcock, MCRP, PhD  
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Suzanne Bruhn, PhD
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Eileen Foley  
A. Preble Jaques  
Mary R. Jeka, Esq.
Pamela A. Murray  
Mary L. Reed  
Barbara Russell  
Anne F. St. Goar, MD  
Jill D. Smith  
Peter Zane

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Richard Gair  
Chief Financial Officer
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Meghan Beaulieu  
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Deborah Stolbach  
Director of Case Management and Social Work Services
Mark Wissmar  
Director of Food Services
Deborah Youngblood, PhD  
Vice President of Research and Innovation

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Economic Mobility Pathways (EMPath) is formerly known as Crittenton Women’s Union (CWU).

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