EMPATH TRANSFORMS LIVES BY HELPING PEOPLE MOVE OUT OF POVERTY AND PROVIDES OTHER INSTITUTIONS WITH THE TOOLS TO SYSTEMATICALLY DO THE SAME.

Mobility Mentoring®

Breaking the cycle of poverty is more complex than ever. At the same time, the latest brain science research shows that poverty causes chronic stress, which impairs skills like planning and decision-making. That’s where Economic Mobility Pathways’ (EMPath) Mobility Mentoring comes in. Mobility Mentoring is the partnering of low-income families with trained mentors, who use a coaching method rooted in the latest brain science. It’s designed to reduce the extreme stresses of poverty, so that families can stay focused on future-oriented goals, despite the immediate challenges that pop up all around.

The Bridge to Self-Sufficiency®

Mobility Mentors use brain science-informed tools, developed by EMPath, to help families achieve long-term economic mobility. A primary tool is The Bridge to Self-Sufficiency, which helps families set, reach, and sustain their goals in a range of areas. EMPath takes a holistic approach because difficulties in one part of someone’s life can create difficulties in another. Fortunately, the opposite holds true, as well. Success in one part of someone’s life can reinforce success in another.
Dear Friends,

For Economic Mobility Pathways, the past year was one of great excitement, filled with new partners, new projects, and new opportunities. We were able to help even more low-income families transform their lives. For us, there’s nothing more exciting.

Everything we do goes hand-in-hand. We’re family-focused and data-driven. Our approach is goal-oriented and science-based. How do these things complement each other in practice?

Imagine, for example, that a Mobility Mentor, upon meeting a homeless participant, looks him square in the eye, and says, “You may not think college was meant for you, but I know you can do it. I will stand by your side to help you take the steps you want to succeed.” The mentor then listens to what the participant wants to achieve; and together, they track progress and measure success.

In the classroom, brain science research shows that this type of coaching is effective. On the ground, our families prove it works, too. We see them make strides every day.

We see the faces of people who have stopped smoking, landed career-tracking jobs, paid off old debts, entered into college and even completed graduate school. We see parents set aside regular family time and improve their own daily routines. We see kids more prepared to start school and getting better grades. We see individuals who are proud to achieve their goals.

EMPath continues to innovate by building programs like our Intergenerational Mobility Project. We continue to partner with all sorts of terrific organizations around the globe through our Economic Mobility Exchange. Fortunately, our innovation and growth has earned us a platform to share a new way of thinking about poverty—and how to combat it.

None of this remarkable success happens without the hard work of our mentors and staff, the bold vision of an incredible Board of Directors, and the foresight and generous contributions of investors. Collectively, you create a formidable team—a group that looks at the seemingly unbreakable cycle of poverty and says: “We will work to end it.”

Gratefully,

Elisabeth D. Babcock, MCRP, PhD
President and CEO

Elizabeth De Montigny
Chairwoman
Boston is a city renowned for top-notch education and cutting-edge innovation. Yet our most vulnerable neighbors have been left behind. Unfortunately, like many top cities in a fast-paced world, Boston struggles with stubborn inequality and cyclical poverty.

Today, thousands of families live below the poverty line. The rate in Boston is 21.5 percent. The latest data show that 20 percent of Boston families live in the poorest neighborhoods, a huge increase from 1970, when that number was eight percent.

As more families found that they were unable to make ends meet, EMPath—whose roots in Boston date back to the 19th century—noticed another striking change. The new knowledge-based economy was becoming more and more complex—and so too was fighting poverty.

A recent study finds that half of Massachusetts workers now hold a bachelor’s degree, a first for any state in the country. For those stuck in poverty, getting ahead is more complicated, more difficult, and more stressful.

Escaping poverty nowadays requires a new response.

To better help its families, EMPath looked in its own backyard. It listened to low-income individuals and direct service workers for on-the-ground knowledge. It turned to Boston’s world-class institutions, like Harvard’s Center on the Developing Child, to better understand the brain science behind poverty.

The result: a systemic shift in how EMPath helps low-income families. The approach is holistic (not discrete) and focuses on long-term gains (not just short-term needs).

In recent years, EMPath has refined, innovated, and expanded, based on what works best for local families.

EMPath’s one-of-a-kind approach to fighting poverty started in Boston. And every day, EMPath is innovating to improve the lives of children and families in Greater Boston.

1 https://www.census.gov/quickfacts/fact/table/bostoncitymassachusetts/PST045216
2 https://www.bostonglobe.com/metro/2016/03/05/segregation/NIQByy000TZsGgLhAT0tHsL/story.html
Poverty isn’t a problem confined to Boston. It confronts the rest of the United States, too. Despite a recovering economy, many people across the country have not felt the benefits. Millions of people—more than one in ten—still fall below the poverty line\(^1\). And income inequality is, historically, at a stunningly high level.

Of course poverty is a massive global problem, as well. While it has been reduced greatly in recent years, the number of people living on less than $1.90 a day is at an alarming 767 million\(^2\). And for those who have escaped poverty, progress can be short-lived.

Tackling the problem is so vexing that groups all over the world are searching for answers. They’re asking: How do we best help low-income people? Once they’ve reached self-sufficiency, how do we prepare them to sustain economic independence?

Many organizations soon heard about EMPath’s breakthrough success in helping families—rooted in an innovative approach—and wanted to learn more.

To keep up, EMPath launched its Economic Mobility Exchange in 2014. In the first month, 14 members joined; since then it’s jumped to more than 70 members. Last year, member organizations served 40,735 adults and 7,958 children using a Mobility Mentoring®-informed approach. Members touch a wide geographic area, from cities and states across the U.S. to the Netherlands and Australia.

EMPath’s Economic Mobility Exchange continues to see huge growth. It’s getting wide interest from non-profit and human service organizations, and increasingly from government agencies.

It holds trainings with partner organizations around the country—and around the world—to build for future success.

The Economic Mobility Exchange is a human services network for the 21st century. Members come together to share ideas and experiences, and learn from each other, with a mission of helping as many people as possible achieve economic independence.

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New Partnerships
“A housing-based approach can transform a neighborhood.”
– Judy Parks, VP of Mobility Mentoring® Programs and Services at EMPath

The low-income housing development on Whittier Street in Boston is undergoing a radical change for the better. EMPath has been tapped to provide its Mobility Mentoring services by the Boston Housing Authority and the federal Department of Housing and Urban Development.

Located in Roxbury, the 200 unit complex will be razed over the next several years. In its place will be a new mixed-income housing community that provides homes to twice the number of families. EMPath’s team has already helped many families make progress in a range of areas.

Short-Term Support
EMPath’s legacy of empowering low-income people dates back to 1800s Boston, as two separate organizations: The Florence Crittenton Home and the Women’s Educational and Industrial Union.

EMPath continues to provide emergency shelter in Massachusetts. Even under the most trying circumstances, the organization is committed to helping families achieve long-term success. This year, for the first time, EMPath used its Bridge to Self-Sufficiency® and Mobility Mentoring model to help these families.

In emergency shelter, participants work with a housing mentor and resident services mentor. Early on, the goal is to adjust to the new surroundings. Later, families work with a program mentor to prepare for permanent housing, future education, and job opportunities. After leaving housing programs, families often continue to work with mentors to set short- and long-term goals.

Long-Term Results
MassLEAP “makes you feel like you are going in the right direction.”
– David, Quincy

In MassLEAP, 50 low-income families receiving state housing assistance work to make economic gains.

EMPath partners with local housing authorities in Braintree, Quincy, Watertown, and the Metropolitan Boston Housing Partnership. After completing the five-year program, participants put savings toward buying a home, furthering education, or other goals.

Recently, EMPath participants shared their stories with local leaders.

“Our experiences in the program show that if you give people tools and resources, and they match them with personal hard work and commitment, success in the form of financial stability is achievable.”
– Quincy state Senator John Keenan

STAT:
Who EMPath served this year:
1,126 people,
680 adults,
446 children

STAT:
This year, 55% of unemployed participants became employed.

STAT:
22% of MassLEAP participants attained professional certificates or degrees this year.
Changing the Narrative
Building off the success of The Intergenerational Mobility Project, EMPath’s policy team set an ambitious goal: shift the conversation on anti-poverty policy toward an intergenerational approach.

EMPath played a leading role in forming a new coalition: “Two Generations Disrupting Poverty”—a group of human service providers from across Massachusetts.

A landmark moment came in March when the coalition brought together experts and human service providers with key members of the administration of Governor Charlie Baker, including four cabinet secretaries. The aim: improve government services by using multi-generational methods.

Later on, the policy team again scored a win for low-income people. As part of the Workforce Solutions Group—a collection of unions and business groups—EMPath helped secure $1 million in the state budget for a “Learn to Earn Initiative,” a comprehensive job training program.

The funds go to training for high-demand jobs; reducing barriers to employment like childcare; and supporting those who don’t meet social safety net requirements, but don’t make enough to be self-sufficient.

Ending Poverty Across Generations
The elusive cycle of poverty keeps low-income families trapped for generations. EMPath wanted to find an effective solution. The result became The Intergenerational Mobility Project.

The latest brain science research shows that, from an early age, stress can impede the ability to focus, plan, monitor, delay gratification, and problem solve. When small improvements are made by parents, the positive impact can be felt by their children. And the positive impacts can build on each other.

EMPath put the findings to work. If mentors could help parents and children, by combining goals and improving communication, then families would succeed and low-income kids would build skills for later in life.

EMPath uses the approach with many Boston families. And the idea has gained momentum. The model is being tested in programs based in Jackson, Mississippi and the state of Washington.

STAT
Of families who have participated in The Intergenerational Mobility Project for at least one year:

- **83%** of families saw an increase in family stability\(^1\)
- **89%** of children saw an increase in their executive functioning skills\(^2\)

\(^1\) as measured by the CHAOS assessment
\(^2\) as measured by the Rothbart assessment
Breakthrough Success

Since 2009, participants in EMPath’s flagship Career Family Opportunity (CFO) program have achieved amazing outcomes. The goal of CFO is for participants to accumulate $10,000 in matched savings and secure a career that leads to a family-sustaining wage. Every participant who stays with the program for at least one year sees big financial gains.

CFO has served 115 low-income women, who have collectively saved $194,418 through the program’s IDA savings initiative. Graduates earn an average annual salary of $45,411, with a 97% employment rate (up from 65% when first signing up). Graduates have seen significant educational success—74% of participants have earned college degrees; most are on track to attain career-sustaining jobs.

From a policy perspective, CFO pays off: as family income goes up, the need for public subsidies goes down. The combined savings to the public is over $8,000 a year per family, according to a “return on investment” study by researchers at Brandeis University.

Science, Research, and Innovation

To combat the challenges of poverty head-on, EMPath takes a data-driven approach. A major way it stays a step ahead is through robust research and evaluation.

EMPath partners with premiere institutions like Harvard’s Center on the Developing Child to gain insights into the latest brain science to better understand how poverty causes chronic stress and hinders executive functioning skills, such as the ability to focus attention, plan ahead, and set goals. EMPath takes the research and puts it into practice with its theory of change—The Bridge to Self-Sufficiency®—and its innovative direct service model—Mobility Mentoring®.

The organization evaluates outcomes on an ongoing basis and, with input from staff and participants, works to improve existing services and develops new programs to better help families.

EMPath spreads the word about the latest poverty-disrupting research. This year, it hosted a series of “Innovation Hours”—public forums on topics like transforming the social service sector; understanding the importance of housing; and recalibrating the early childhood arena.

“I used to be focused on the end goal; I didn't know how to break it down into achievable steps.”
– Michelle W.

When Michelle joined EMPath’s CFO program, she felt overwhelmed. Getting out of poverty was the clear goal. What was less clear was how to get there. What steps did she need to take?

With support from her Mobility Mentor, Michelle set goals—and followed through. This spring, she earned an excellence award at her job at a local hospital and she is aiming for a promotion.

Meanwhile, her son, who was accepted to a local college on full scholarship, is striving to become an engineer. In addition to her son’s resilience and hard work, Michelle believes EMPath’s tools and coaching set the foundation for his future, too.
The Economic Mobility Exchange

Due to the success of the Mobility Mentoring® approach, EMPath’s model has been adopted by scores of non-profits and governments across the U.S. and around the world. EMPath is motivated to spread the word about the brain science-informed coaching model, because it works.

In the past year, the Economic Mobility Exchange team held trainings across the U.S., including: Western Massachusetts, Chicago, Kansas City, Denver, and the state of Washington. And it hosted webinars for members on a host of topics, including: crisis management, effective advocacy, staff supervision, incentives, and employment coaching.

Number of Participants Served Using Mobility Mentoring®-Informed Tools and Approaches

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
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<tbody>
<tr>
<td>FY16</td>
<td>16,401</td>
</tr>
<tr>
<td>FY17</td>
<td>48,693</td>
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Partnering with Other Organizations

The Economic Mobility Exchange (the Exchange) has just launched an official three-tiered membership program, which includes an all-new certification level. The expansion is designed to support growing interest in being able to implement Mobility Mentoring® to fidelity.

By using varying degrees of EMPath’s tools, Exchange member organizations have been able to offer Mobility Mentoring-informed services to their participants. By sharing their outcomes and strategies, members provide EMPath with insight to advance the direct service model and share what it’s learned across the entire network.

A flexible, yet consistent approach across all three tiers will allow for ongoing evolution and a more robust integration of shared learning.

New Publications

This year, the Economic Mobility Exchange team released two publications for member organizations.

The first discusses how member organizations have adapted EMPath’s Bridge to Self-Sufficiency® tool to best serve their participants; and how a Mobility Mentoring-informed approach is being used with different program models.

The second, Design Logic: Bridge to Self-Sufficiency®, tackles frequently asked questions. It also goes in depth on the research and logic behind the tool.

The Exchange is EMPath’s growth strategy and it’s already scaling poverty alleviation tools far beyond Massachusetts. As the Exchange grows, the tools developed in Boston—and perfected with the help of partner organizations across the globe—will improve. And that will allow even more people to achieve economic mobility.

1. Level One Learning Member
   Designed for organizations interested in developing a deeper understanding of Mobility Mentoring and connecting with other Exchange member organizations.

2. Level Two Mobility Mentoring®-Informed Practitioner
   Designed specifically for organizations that are implementing or are ready to implement a Mobility Mentoring-informed model. Level Two members will work with the Exchange to track and share programmatic outcomes.

3. Level Three Certified Mobility Mentoring® Organization
   Designed for Level Two organizations that have experience implementing a Mobility Mentoring-informed model and that want to be certified by EMPath as delivering Mobility Mentoring services. Level Three membership includes replicating the Mobility Mentoring model to fidelity and working with the Exchange to track and share programmatic outcomes.
Partnership with the Netherlands

In the fall of 2016, EMPath President and CEO Beth Babcock visited the Netherlands to speak with officials from 35 Dutch municipalities. She described EMPath’s Mobility Mentoring® approach and explained how it helps low-income families achieve self-sufficiency.

The municipality of Alphen aan den Rijn in the Netherlands has begun piloting a Mobility Mentoring-informed model with approximately 200 program participants.

Alphen aan den Rijn, and its partners at Utrecht University of Applied Sciences, have translated and adapted the Bridge to Self-Sufficiency® for use in the Dutch system. They have already held a series of training sessions for participants. Practitioners in Alphen aan den Rijn say that the use of Mobility Mentoring has allowed them to have more in-depth conversations with participants. Alphen aan den Rijn has allocated €100,000 for an incentive system, roughly €500 per participant. It will begin collecting data at the end of 2017 on the effectiveness of incentives for goal achievement.

As Mobility Mentoring has continued to expand in the Netherlands, EMPath has made an agreement with Platform31, a learning collaborative that includes more than 300 partner organizations. Platform31 will act as an extension of the Exchange, rolling out a new network of Dutch municipalities that will implement EMPath’s coaching practices across the country.

“Mobility Mentoring holds great promise for our participants struggling with the everyday stresses of poverty.”

– Professor Nadja Jungmann
Utrecht University of Applied Sciences
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As of
6/30/17 6/30/16

Assets
Current Assets $1,242,789 $1,872,666
Investments $5,467,513 $5,363,080
Property, Plant and Equipment, Net $3,343,876 $3,503,236
Total Assets $10,054,178 $10,738,982

Liabilities and Net Assets
Liabilities:
Current Liabilities $847,601 $924,902
Total Liabilities $847,601 $924,902

Net Assets:
Unrestricted - Undesignated $1,949,693 $2,475,338
Unrestricted - Board Designated $2,486,194 $2,513,206
Temporarily Restricted $2,647,741 $2,702,587
Permanently Restricted $2,122,949 $2,122,949
Total Net Assets $9,206,577 $9,814,080

Total Liabilities and Net Assets $10,054,178 $10,738,982

FY17 FY16

Operating Revenue
Program Service Fees $8,771,003 $9,043,056
Gifts and Grants $1,611,181 $2,205,175
In-kind Gifts $199,477 $207,666
Investment Income Appropriated $693,000 $398,000
Other Income $399,437 $165,282
Total Operating Revenue $11,674,098 $12,019,179

Operating Expenses
Program Services $10,021,168 $10,046,832
Management and General $1,384,833 $1,263,480
Fundraising $549,241 $695,809
Total Operating Expenses $11,955,242 $12,006,121

Change in Net Assets from Operating Activities ($281,144) $13,058

Change in Net Assets from Non-Operating Activities ($271,513) ($342,821)
Change in Temporarily Restricted Net Assets ($54,846) ($542,848)
Change in Permanently Restricted Net Assets - -
Total Change in Net Assets ($607,503) ($872,611)

Sources of Operating Funds: $11,674,098
FEE FOR SERVICE 8%
GIFTS AND GRANTS 16%
INVESTMENT INCOME 6%
GOVERNMENT SUPPORT 70%

Use of Operating Funds: $11,955,242
RESEARCH AND ADVOCACY 6%
MANAGEMENT AND GENERAL 12%
FUNDRAISING 5%
PROGRAMS 77%
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