LETTER FROM THE PRESIDENT & CEO

What a year it has been! The Economic Mobility Exchange™ (the Exchange) now has over 130 members around the globe, including many in our partner Exchange in the Netherlands. Through and with our members we spread and evolve effective approaches that promote economic mobility.

For the first time, members engaged with our Research and Evaluation department on a shared data collection project. Ten organizations submitted data on a total of roughly 1,700 households. You can read about some of the initial findings on page six. We are very excited about this shared data, as this kind of collaboration is incredibly rare in the human service sector. While the data is still nascent, we know that this is just the beginning of a groundbreaking project that has the potential to change the face of economic mobility programs.

I am so energized to learn about the successes of the many programs who have been implementing Mobility Mentoring®-informed programs for some time, as they contribute greatly to our understanding of how and why this approach works. I am eager to hear more from our newer members, as they bring the approach to new people and places. I look forward to connecting with many of you in the year to come through the summits and at the convening and conference.

SAVE THE DATE: 2020 EVENTS

Eastern Regional Learning Summit

Our Regional Learning Summits allow members and non-members of the Exchange to gather and learn about topics that impact our work and the people we serve. We are taking the conversation of equity and inclusion on the road to Philadelphia, PA in Spring 2020 in partnership with Episcopal Community Services.

Disrupting Poverty Conference & Exchange Member Convening

Please join us in Boston for the Bi-Annual Exchange Member Convening on October 7, 2020 and for EMPath’s Bi-Annual Disrupting the Cycle of Poverty Conference on October 8-9, 2020! The conference theme this year is 2020 Vision: The Future of Poverty Disruption. Conference sessions will dig deeply into how major trends and shifts impact the future of work, education, human services, and how policy on a practical basis can be applied to sustain exits from poverty and ensure future success.

REGIONAL SUMMIT

Wednesday, March 18
Philadelphia

MEMBER CONVENING

Wednesday, October 7
Boston

PUBLIC CONFERENCE

Thursday–Friday October 8-9
Boston
# Economic Mobility Exchange

## 200,000+

**total number of individuals served since 2014**

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<tr>
<th></th>
<th>87</th>
<th>705</th>
<th>134</th>
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<tbody>
<tr>
<td>Number of orgs</td>
<td>number of organizations trained in 2019</td>
<td>number of individuals trained in 2019</td>
<td>number of Exchange members in 2019</td>
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<tr>
<td>Trained in 2019</td>
<td>87</td>
<td>705</td>
<td>134</td>
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<tr>
<td>Trained since</td>
<td>258</td>
<td>3,000</td>
<td>97%</td>
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<tr>
<td>2014</td>
<td>number of organizations trained since 2014</td>
<td>number of individuals trained since 2014</td>
<td>percent of network members who would recommend the training</td>
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<tr>
<td>Trained since 2014</td>
<td>258</td>
<td>3,000</td>
<td>97%</td>
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## Types of Member Organizations

- **Direct Service Provider (Small)**: 48%
- **Direct Service Provider (Large)**: 31%
- **Network of Direct Service Providers**: 6%
- **Government Agency**: 8%
- **Philanthropic Organization**: 3%
- **Academic Institution**: 4%

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SHARED DATA RESULTS FROM THE RESEARCH & EVALUATION TEAM

“In God we trust; all others must bring data.” - W.E. Deming

Data and outcomes are an essential element of Mobility Mentoring® (MM) because we know that it is important for participants to measure their own progress. Having outcomes data allows participants—and their mentors—to see what has worked, and where there’s still area for improvement.

In a similar manner, data and outcomes are key for the Exchange because we want to know what’s worked in other programs. Currently, Level 2 members implementing a MM-informed approach are required to share their data after the first year of implementation. EMPath’s Research and Evaluation (R&E) team collects that data, then shares it with other Level 2 members, feeding the learning community.

2019 was the first year we compiled and analyzed this shared data. This is very exciting because sharing data is regrettably rare in the human service sector. There are few places where different organizations come together to report outcomes data. However, we know that this kind of collaboration is absolutely key to improving the work. Just like with participants and mentors, when we can learn what works best, and where we should evolve best practices for the field. While this project is still in its very early stages, we know that this is just the beginning of a whole new way of working.

The preliminary figures below represent a snapshot of the data. The R&E team is undertaking a more detailed analysis to understand: the relationships between program characteristics; the underlying MM processes; and the outcomes. More importantly, we will share the data with contributing organizations.

Each organization will see how they differ from their peers, and what we can learn from each other. R&E will work with these organizations to revise and improve the data collection process, clear up any ambiguities in data definitions, and identify data elements to modify for next year. EMPath has hired an “external” data manager to oversee this very process. Next year, we hope that many more organizations will submit their data and continue to expand this industry-leading project.

13
number of organizations that submitted data

16
number of programs from which data was submitted

87
average number of households served per program

1,305
average number of goals set per program

$5,295
Average Annual Income Increase of Program Participants

74%
Average Goal Achievement Rate of Program Participants
Thank you to the following member organizations for submitting data!

Special thanks to Branches, COTS Detroit, Educational Alliance, and Episcopal Community Services. These groups worked with us to prioritize reported data elements, develop data definitions, and pilot test the process.

Next year, we hope that many more organizations will submit their data and continue to expand our learning community.
INTERGEN PROJECT PILOT UPDATE

Poverty affects families on multiple levels. The Intergenerational Mobility Project (Intergen) applies a whole family approach to coaching and goal-setting. Families in the Intergen program learn how to support each other while intentionally working together, and to achieve the shared goal of self-sufficiency by including children on the journey.

The first Intergen pilot project took place in 2017 in collaboration with Children’s Home Society of Washington and Midtown Partners, Inc. EMPath gained key learning insights from this initial pilot to improve the second pilot and to create the Recommendations for Expanded Intergenerational Mobility Project. We learned that:

• organizations should have at least one year of Mobility Mentoring® experience
• organizations should have a culture that values both brain science-informed and participant-driven coaching practices.
• the tools are best suited for families with multiple adults and/or mixed age children for a program length of two years when used to support ongoing coaching
• the tools can be best utilized as an introductory educational device for those families with one parent and children under the age of 5 and not utilized over time.

The second Intergenerational Mobility Pilot, funded by the Nordblom Foundation, conducted an application process for partners. Now, Intergen welcomes five new Level 2 partners, Coalition on Temporary Shelter, Community Services Consortium, Heading Home, The Family Partnership, and Opportunity Alliance.

TOOLS ADAPTED

South East Community Links delivers a wide range of assistance to meet the needs of people in their community. They crafted a colorful and relational adaptation of EMPath’s Bridge to Self-Sufficiency®. This adaptation called the Bridge to Social and Economic Mobility is participant-centered and caters to new Australian residents. The Bridge is constructed of only “I” statements with a pillar called “Diversity, Participation and Opportunities” that acknowledges the need for participant connection to community, sharing of identity with others, and building a home in Australia. Level 2 members of the Exchange can access this adapted tool on the Portal under Member Submitted Tools.
MEMBER HIGHLIGHTS

MOST IMPACTFUL

Washington State Department of Children, Youth, and Families and their Early Childhood Education and Assistance Program (ECEAP) partner providers had a busy year disrupting poverty for families, and have the data to demonstrate it! In their most recent evaluation, Washington State Department of Children, Youth, and Families (DCYF) showed the following impressive outcomes:

• Statistically significant and positive increases in family functioning across all 17 items measured in family assessments
• 4,516 goals set and 2,081 goals achieved
• More than 92 percent of families strongly agreed or agreed that they were treated with respect.

After three years of developing, piloting, gathering feedback, and adjusting the MM-informed family support approach, ECEAP will implement the model statewide. Check out their annual pilot and outcome reports to learn more about this statewide initiative and the demonstrated outcomes changing families’ lives.

INFLUENTIAL LEADERS IN THE FIELD

Episcopal Community Services (ECS) works to challenge and reduce intergenerational poverty. As a valuable learning partner within the Exchange, they contribute a wealth of experience and learning to the network. For instance, ECS presented a webinar entitled Supporting Male and Father Inclusion for the September 2017 edition of the Exchange Monthly Webinar Series and presented the workshop Engaging Participants, Staff, and Board Members in Advocating for Economic Mobility at the 2018 Exchange Member Convening. In addition, all ECS staff (i.e. direct service, facilities, administrative, etc.) are trained in Mobility Mentoring®. As such, the organization feels strongly about Mobility Mentoring-informed approaches and coaching and has a strong commitment to diversity and inclusion. This is evident in ECS’ appointment of its first chief inclusion and advocacy officer in 2016 and the recent October 2019 Forum on Justice and Opportunity. Thank you ECS for continuously influencing our field and improving the lives of participants in your community!
CURRENT EXCHANGE MEMBERS
AS OF JANUARY 30, 2020

22 members in the Netherlands Exchange