ANNUAL REPORT
FISCAL YEAR 2021

THE ROAD AHEAD
Dear Friends,

When is the last time you heard something good about the past year—especially when it comes to people struggling to make ends meet? Well, brace yourselves, because at EMPath, we have seen some bright spots even in the midst of COVID’s terrible social and economic toll. A consistent theme—for our participants and for our organization—was that throughout all the challenges, we’ve been able to not just keep moving forward, but actually to make preparations for the road ahead.

In spite of everything the past year threw at them, our participants stayed engaged in our economic mobility coaching and kept on achieving the kinds of goals that help them progress. We’ve heard from our participants that during times of so much chaos, crisis, and uncertainty, our coaching has been especially useful. During the year, nearly a third of our participants started new education programs, setting themselves up to get better paying jobs in the future.

We at EMPath kept on making strides as well. Our learning network, the Economic Mobility Exchange (the Exchange), now includes 145 organizations. This past year, Exchange staff trained over 100 human service organizations across the country, helping them improve their practice. And in 2021, we prepared for the road ahead by creating a new plan for the future of the organization, and securing funding to grow and strengthen our work for years to come. Our plan will allow EMPath to reach a million families across the country by investing in a unique combination of direct service, learning exchange, research, and advocacy for what works. We are confident this “virtuous cycle” will continue to allow each part of our work to inform what we know, do, and share with others to seed systemic change.

We’re so grateful to all of you who have made this journey possible in 2021 and look forward to continuing to share it with you as our new work unfolds.

All the very best,

Elisabeth D. Babcock, MCRP, PhD
President & CEO

Corinne Larson
Board Chair
A New Strategic Plan for a New World

As the U.S. continues to struggle with the economic effects of the pandemic, we are realizing that many of the systems we took for granted are not as effective as they could be. Today more people are struggling than ever before. EMPath has developed an ambitious strategic plan that aims to transform the human services field in the U.S., and help over a million people in the coming years.

The plan includes:

- Strengthening our national footprint by growing the Exchange network, with a focus on the early childhood and housing sectors,
- Rigorously evaluating the Mobility Mentoring® approach through a randomized control trial and building evidence for its use in specific sectors, and
- Creating a plan to scale through publicly funded systems.

EMPath’s Disrupting the Poverty Cycle Conference Focused on Future of Poverty Disruption

EMPath’s biennial conference examined the future of poverty disruption, with engaging speakers from a wide range of sectors. Nearly 500 people from around the globe came together virtually to discuss new strategies for disrupting poverty. Together we focused on three questions:

1. What changes are happening in the world today that have significant import for the future of poverty disruption?
2. What are the implications of these changes for the economic mobility of those who have been stuck at the bottom?
3. How do we adapt to these changes to strengthen our work?

Over the course of a week, dozens of sessions featured world-class speakers discussing what’s to come across a variety of topics, from the future of work, to considerations for narrative change, to the future of philanthropy.
Coaching That Works

Mobility Mentoring®
FY21 Impact Highlights

Mobility Mentoring is EMPath’s signature approach for partnering with participants, helping them to overcome the stresses associated with poverty and oppression and achieve the goals that are meaningful to them. EMPath has been using this approach since 2009, but it has been especially important in the chaos of the past eighteen months or so. The pandemic and its economic consequences, heightened awareness of structural racism and other forms of inequality, and uncertainties about the future have made this a uniquely stressful time for families who are struggling.

But Mobility Mentoring has helped during this difficult time. EMPath’s mentors have helped families stay focused on their long-term goals in spite of a constant barrage of bad news.

In FY21, we served 1,337 individuals
700 adults • 637 children

Overall goal achievement rate for adult goals was 76%

Of the 162 people who exited a shelter program, 94% moved to stable, permanent housing

30% of participants newly enrolled in an educational or training program

CFO graduates’ average income at entry: $18,120
CFO graduates’ average income at exit: $48,576

Average Percentage Increase of Annual Income 168%
However, even with good mentoring, participants have not been immune to the effects of pandemic life this year. They have noted the following impacts:

### IMPACTS OF COVID

<table>
<thead>
<tr>
<th>Impact</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduced or lost childcare</td>
<td>45%</td>
</tr>
<tr>
<td>Increased mental health symptoms</td>
<td>40%</td>
</tr>
<tr>
<td>Lost or reduced employment or income</td>
<td>38%</td>
</tr>
<tr>
<td>Reduced savings or increased debts</td>
<td>30%</td>
</tr>
<tr>
<td>Reduced engagement at school/work due to family needs</td>
<td>30%</td>
</tr>
</tbody>
</table>

All of these factors affected participants’ income, compared to previous years.

Of our FY21 participants who had two valid income assessments more than 6 months apart, 23% had a 10% or greater increase in earned income.

### In the participants’ words:

“[My mentor and I] are always on the same page. I can talk to her about anything, even if it’s negative. She leads me to the right path. She supports me emotionally, especially when I think I can’t make it.”

“Overall, [the program] has been positive and a tremendous help to us during times of need. I feel more knowledgeable and in control of my life, thanks to EMPath.”

### Helping Participants Prepare for the Future: Addressing Vaccine Hesitancy and Barriers

For a variety of reasons, vaccines have not rolled out equitably across all populations in the United States. At EMPath, staff had to address both a lack of access to vaccines and vaccine hesitancy.

In the past year, staff at EMPath have been doing their part to make sure that everyone who can get vaccinated does. Through listening, talking through anxieties, explaining the science behind the vaccine, and sharing their own experiences, they have assuaged families’ fears about the vaccine. Additionally, EMPath partnered with healthcare providers to hold many on-site vaccination clinics in our shelters for participants and staff—bringing the lifesaving vaccine right to where people lived. Along with their mentors, participants created and achieved goals to get themselves and their families vaccinated at astounding rates.
Amanda is the Director of Residential and Program Mentoring at Hastings House, the second largest congregate shelter in Massachusetts, which houses 58 families.

**What do you do in your role?**

I’m a Jill of all trades. I have to think about the big picture, like programmatic goals, as well as day-to-day operations. One day I might help facilitate COVID testing, and another I’ll have a budget meeting.

What I enjoy most about this job is the camaraderie. Everybody here is motivated by the same mission—to give participants the best experience while they’re in shelter.

**When you first started at EMPath, you were hired as a Case Manager. What’s the difference between Mobility Mentoring® and case management?**

Traditional case management is doing things for the participant. Mobility Mentoring, on the other hand, is collaborative work. It’s a partnership, the participant is the pilot and the mentor is the copilot, a guiding force. It’s participant-driven, they are the experts in their own lives; I’m here to be a sounding board.

When they leave the program, participants have a toolkit they can tap into. They’re able to advocate for themselves and give these skills to others in their family or community.

**Do you notice a difference in participants’ mindsets with Mobility Mentoring?**

Definitely. I think a lot of people whose basic needs aren’t being met don’t have the bandwidth to think of dreams and hopes. It’s more about the present—where am I going to get diapers and formula? When participants get to Hastings, we make sure they have their basic needs met in the very beginning. Then they have that safe space to build executive functioning skills through Mobility Mentoring, to aspire, learn, and ask questions.

When participants achieve their goals of permanent housing, I always tell them that subsidized housing isn’t the end all be all. There’s so much more room to grow.

**What is one moment that you feel exemplifies EMPath’s work?**

Any time a participant comes to a meeting and says, “I set this goal for myself and I did it already,” that’s amazing. That’s what I want them to do when they move out of Hastings. It doesn’t matter how big or small the goal is, they’re ready to celebrate with you. Seeing how proud they are when they come into the meeting is what keeps us going.
Claire has been in EMPath’s programs since 2013. First a resident of Hastings House, EMPath’s large congregate shelter in Brighton, and now in Career Family Opportunity (CFO), our five-year flagship program, Claire has accomplished numerous goals and advocated for critical policies.

Since moving from Hastings to permanent housing, Claire has graduated from nursing school, gotten married, and “watched my daughter grow academically, spiritually and athletically.” She has worked with EMPath’s Financial Specialist to budget, build her credit, and pay off much of her debt. At the beginning of the pandemic, she took advantage of extra free time to complete a first-time homebuyers’ class online. Claire hopes to buy a home in the near future and is also studying for her boards to become a licensed Registered Nurse.

Claire is a steadfast advocate for herself and those around her. Earlier this year, she spoke at a lobby day to push for increased funding for the Massachusetts Rental Voucher Program (MRVP), which provides subsidies to help families pay rent. “I would like officials to see my journey and see what a difference access to shelter and housing assistance made for me,” she shared at the event. “We need more funding for MRVP, public housing, and other programs to make housing more affordable.”

Claire says her EMPath mentors have been her biggest cheerleaders. “Mutual respect goes a long way. I hope families in shelter now have awesome mentors like I did,” she said.

Claire’s current mentor, Caroline, says “Claire embodies Mobility Mentoring.” “Claire has shown immense resilience and has navigated obstacles, barriers, and systems. I’m grateful to work with Claire and I tell her that frequently. At this point in her journey in CFO, Claire writes goals on her own and sends them to me. That’s our long-term goal for everyone we work with at EMPath. Claire is a constant reminder of why I do this work.”

“I have found peace and happiness in my life.” Claire shares. “I have high hopes for the future.”
What is The Exchange?

The Exchange is EMPath’s learning network for human services organizations looking to improve outcomes for the families they serve. Members learn about our economic mobility coaching approach, Mobility Mentoring, and integrate it into their programs. Members represent nonprofit and government organizations of all types, including housing programs, hospitals and healthcare organizations, early education and care programs and multi-service organizations. The Exchange started in 2014 when other organizations started to notice the breakthrough outcomes EMPath’s participants were having, and it has been growing steadily since then.

145 Exchange Members in FY21

98% would recommend the Exchange

474 organizations trained since 2014

4,300+ Individuals trained since 2014

310,000 individuals served with the model via the network since 2014
Impact Stats

14,568 households from 17 member organizations across the country are represented in this data. These outcomes (right) help paint a picture of Mobility Mentoring’s broader impacts in the face of the national crises of the pandemic and massive unemployment.

**FY2021**

$3,600
Average Annual Income Increase among participants served by Exchange member organizations

78%
Average Goal Achievement Rate among participants served by Exchange member organizations

“This has been a **game changer** in seeing more movement toward goals”

“Our staff finally feel like they are getting to do the job they were hired to do”

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Economic Mobility Exchange Members

United States (115 total)

Australia

Netherlands
# Individual Donors

## $100,000+
- Anonymous

## $50,000-$99,999
- Donna Jeffers

## $20,000-$49,999
- Victor Allis & Sara Gifford
- Eileen Casey
- Brian & Stephanie Spector

## $10,000-$19,999
- Anonymous
- Elisabeth Babcock
- Larry & Sheila Kantor
- William Mantzoukas
- Janet Offensend
- Barbara & Gordon Russell
- Eric Tencer

## $5,000-$9,999
- Anonymous
- Susan H. Donahue
- Anna G. Finnie
- Jennifer Gaudet
- D’Arcy & Howard Goldman
- Ed & Katherine Pendergast
- Robert K. Reilly
- Theresa & Nathaniel Roy
- Melissa Tansey
- Peter Zane

## $1,000-$4,999
- Anonymous (x2)
- Nathalie Apchin
- Carson Biederman
- Elizabeth Boveroux
- Rachel Chagnon
- Mary Coleman
- Lisa Coll
- Katharine Delaney
- Estate of Beatrice Geneses
- William & Courtney Goldthwait
- Jay Hirsh
- Ellie Jeffers-Ward
- Nancy Keating
- Clyde Kessel
- Corinne Larson
- Gregory Lewis
- Helene Lieb
- Eric Lim
- Pamela Murray
- Louise Murray
- Nussbacher Family Fund
- Eric Paley
- Stephanie Preston
- Benson Shapiro
- Fredi Shonkoff
- Jill Smith
- Lauren Smith
- Bonnie Stoner
- Anne Symchych
- LaShauna Walker
- Wendy Watson
- Mary Werler
- Susan Whitehead
- Seamus Young

## $500-$999
- Margaret Ackerman
- Elizabeth Barringer
- Tamar & Jeremy Kaim Doniger
- Mary Farrington
- Linda Felter
- Michelle Freshman
- Preble Jacques
- Barbara Joslin
- Jacob Kach
- John Kain
- Patricia Mullin
- Holyn Nickerson
- Adele Pressman
- Wendy Shattuck
- Tamara Sitkoff
- Anne Turner

## $499 & Under
- Anonymous (x2)
- Michael Ames
- Daniel Arkins
- Linda Ayers
- Nancy Bates
- Chantal Below
- Joni Beshansky
- Nancy Biederman
- Laurel Black
- Michelle Bokun
- John Booth
- Dan Bornstein
- Carol Bowen
- Steffanie Brady
- Heidi Brooks
- Holly Burns
- Catherine Buttenweiser
- Leon Cantor
- Michael Capontini
- Leslie Caro-Harf
- Carol-Lynne Casey
- Mark Chandoo
- Sonia Chang-Diaz
- Kathie Chrisicos
- Amanda Cobb
- Chris Colbert
- Cheryl Condon
Carey Cort
Dyan Cotton
Francis Crocetti
Deborah Danker
Elizabeth De Montigny
Sage Dowiak
Brian Ellis
Susan Foster
Barbara Freedman Wand
Elizabeth Furr
Richard Gair
Rio Gaiser
Janice Gaudet
Julia Gittleman
Allison Godoff
G.W Goodale
Clarice Gordon
Marissa Graziano
Patricia Greninger
Maya Grevatt
Brian Hale
William Hannon
Brian Harrison
Lisa Hasko
Holly Hauxjeffers
Nancy Hegarty
Michael Hession
Stuart Jacobson &
  Suzanne Cooper
Jen Johnson
Amy Johnson
Janice Johnson
Anne Kenny-Urban
Ammar Khan
Sarah Kipp
Katherine Kopp
Jan Kruse
Jermaine Lawrence
Dietra Lee
Ruthie Liberman &
  Danny Watt
John Lippitt
Ann Lord
Glenn Lucas
Alister Martin
Judith McDonough
Jodie McGowan
Katherine Messenger
Joan Mikula
Alison Miller
Gail Monaghan
Laurence Morris
Theodore Murphy
Stewart Newell
Susan Newton
Hollis Nichols
George Noyes
Judith Obermayer
Martha O’Donnell
Barbara Ogden
Constance Otravodec
Michael Pahre
Enlin Pan
Elizabeth Paterra
Genevieve Peck
David Pilbeam
Vanessa Poster
Dorothy Puhy
Mairead Ray
William Ray
Ursula Resendes
Stephen & Diane Richter
Shauntavius Roberts
James Rodriguez
JoEllen Ross
Nicki Ruiz de Luzuriaga
Carole Schlessinger
Leah Sciabarasi
Robert Seifert
Patrick Slevin
Carol Stoner
Beverly Sullivan
Eleanor Sullivan
Marc Taricani
Raija Vaisanen
Maryann Wadsworth
Barbara Wallace
Andrea Walonis
Laura Walta
Sebastian Weyn
Dorothy Wiresma
Janet Yassen
Mary Jane & Rick Zimmer
Advocacy Highlights

When it comes to legislative advocacy, FY21 was one of EMPath’s most successful years! Each legislative session, we survey participants and direct service staff to inform our budget and legislative priorities. Our Director of Advocacy works to push them forward, in coalition with other organizations across Massachusetts. Together, we achieved some exciting policy wins:

10% increase to the grant amounts for cash assistance
This is a critical first step to lifting kids out of deep poverty as these grants have not been raised in over 20 years.

$135 million for MRVP housing assistance for 8,000+ households
This funding will allow for some new vouchers to help individuals and families access affordable housing.

Inclusion of SNAP Gap efforts
This is a major policy win and will ensure those eligible for MassHealth can easily apply for the Supplemental Nutrition Assistance Program.

New line item for subsidized child care
This will allow families to use money they would have spent on child care on other basic needs through June 2021.
# Corporate & Foundation Donors

## $100,000+
- Bill & Melinda Gates Foundation
- Blue Meridian Partners
- Michael and Susan Dell Foundation
- Nordblom Family Foundation

## $50,000-$99,999
- Deloitte Consulting, LLP
- Frieze Family Foundation
- State Street Foundation

## $20,000-$49,999
- Brickbottom Foundation
- Cabot Family Charitable Trust
- Highland Street Foundation
- John Hancock Financial Services, Inc.
- Liberty Mutual Group
- Lincoln and Therese Filene Foundation
- PricewaterhouseCoopers LLP
- Women’s Foundation of Boston

## $10,000-$19,999
- Anonymous
- A.C. Ratchesky Foundation
- Anna B. Stearns Foundation

## $5,000-$9,999
- Alice Willard Dorr Foundation
- Anchor Capital Advisors, LLC
- Dorothy and Jonathan Rintels Charitable Foundation
- Franklin Square House
- Frederick A. Bailey Trust
- Hastings-Plummer Fund
- Pearson Foundation Fund
- Skillworks
- TD Bank Foundation

## $1,000-$4,999
- Brown Advisory Charitable Foundation
- Bushrod H. Campbell & Adah F. Hall Fund

## $1,000 and below
- Amelia Sillman Rockwell & Carlos Perry Fund
- Cambridge Trust
- Gilbane Foundation
- Harvard Pilgrim Healthcare Foundation
- New Heights Group
- William Blair Investment Banking
- Your Choice Brands
## Statement of Financial Position

### Assets

<table>
<thead>
<tr>
<th></th>
<th>6/30/21</th>
<th>6/30/20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Assets</td>
<td>$5,955,498</td>
<td>$3,473,419</td>
</tr>
<tr>
<td>Investments</td>
<td>$6,885,508</td>
<td>$5,022,785</td>
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<tr>
<td>Property, Plant and Equipment, Net</td>
<td>$3,099,248</td>
<td>$3,381,224</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$15,940,254</strong></td>
<td><strong>$11,877,428</strong></td>
</tr>
</tbody>
</table>

### Liabilities and Net Assets

<table>
<thead>
<tr>
<th></th>
<th>6/30/21</th>
<th>6/30/20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Liabilities</td>
<td>$1,212,120</td>
<td>$1,094,065</td>
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<tr>
<td>Notes Payable</td>
<td>$779,666</td>
<td>$2,332,803</td>
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<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>$1,991,786</strong></td>
<td><strong>$3,426,868</strong></td>
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<tr>
<td>Net Assets:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Without Donor Restrictions</td>
<td>$7,916,540</td>
<td>$3,677,416</td>
</tr>
<tr>
<td>With Donor Restrictions</td>
<td>$6,031,928</td>
<td>$4,773,144</td>
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<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$13,948,468</strong></td>
<td><strong>$8,450,560</strong></td>
</tr>
<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td><strong>$15,940,254</strong></td>
<td><strong>$11,877,428</strong></td>
</tr>
</tbody>
</table>

## Statement of Activities

### Operating Revenue

<table>
<thead>
<tr>
<th></th>
<th>FY21</th>
<th>FY20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Service Fees</td>
<td>$10,385,003</td>
<td>$9,375,547</td>
</tr>
<tr>
<td>Gifts and Grants</td>
<td>$6,329,678</td>
<td>$2,280,991</td>
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<tr>
<td>In-Kind Gifts</td>
<td>$184,831</td>
<td>$321,292</td>
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<tr>
<td>Investment Income Appropriated</td>
<td>$253,000</td>
<td>$264,000</td>
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<tr>
<td>Other Income</td>
<td>$468,904</td>
<td>$424,309</td>
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<tr>
<td><strong>Total Operating Revenue</strong></td>
<td><strong>$17,621,416</strong></td>
<td><strong>$12,666,139</strong></td>
</tr>
</tbody>
</table>

### Operating Expenses

<table>
<thead>
<tr>
<th></th>
<th>FY21</th>
<th>FY20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>$11,546,914</td>
<td>$11,382,519</td>
</tr>
<tr>
<td>Management and General</td>
<td>$1,247,998</td>
<td>$1,284,342</td>
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<tr>
<td>Fundraising</td>
<td>$438,318</td>
<td>$509,166</td>
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<tr>
<td><strong>Total Operating Expenses</strong></td>
<td><strong>$13,233,230</strong></td>
<td><strong>$13,176,027</strong></td>
</tr>
</tbody>
</table>

### Change in Net Assets

- **Change in Net Assets from operating activities**: ($4,388,186) ($509,888)
- **Change in Net Assets from non-operating activities**: ($1,109,722) ($85,592)
- **Total Change in Net Assets**: ($5,497,908) ($595,480)

### Ending Net Assets

- **Ending Net Assets**: $13,948,468 $8,450,560

## Use of Operating Funds:

- **Government Support**: 56%
- **Gifts and Grants**: 37%
- **Fee for Service**: 6%
- **Investment Income**: 1%

## Sources of Operating Funds:

- **$17,621,416**
- **Government Support**: 56%
- **Gifts and Grants**: 37%
- **Fee for Service**: 6%
- **Investment Income**: 1%
Board of Directors

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Economic Mobility Pathways, CEO

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Vice President of Public Policy

Jennifer Lowe, PhD
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Nicki Ruiz de Luzuriaga, MPA
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Vice President of Research and Evaluation