

Mobility Mentoring® Overview

Overview:

Mobility Mentoring is a holistic coaching approach aimed at increased **economic mobility inclusive of participant directed goal setting across five pillars: Family Stability, Well-being, Financial Management, Education & Training, and Employment & Career.** Mobility Mentoring was developed by Economic Mobility Pathways (EMPath), a 200-year-old nonprofit. The approach is based on emerging research within the fields of neuroscience, human development, and behavioral economics.

EMPath defines Mobility Mentoring as “the professional practice of partnering with participants so that over time they may acquire the resources, skills, and sustained behavior changes necessary to attain and preserve their economic independence.”



Mobility mentoring includes 4 essential elements:

- **Coaching for Economic Mobility:** Participants work with their coaches, called Mobility Mentors, to strategize big ideas, trouble-shoot challenges, and chart a path forward.
- **Economic Mobility Bridge:** A holistic tool that helps families understand where they are currently, where they want to go, and how different areas of their lives impact each other.
- **Goal Setting:** Mentors support participants in prioritizing what goals they would like to work on within the pillars of the Bridge, in the short- and long-term.
- **Recognition:** Acknowledges and celebrates a participant when they accomplish a goal.

To support grantees in implementing Mobility Mentoring in alignment with the unique strengths and needs of their organizations and communities, the grant will include resources and technical assistance. While specific areas of on-going support will be refined over the planning year, MHM expects the following will be available for grantees implementing Mobility Mentoring:

- ## Program Requirements:

1. Economic Mobility Bridge Assessment:

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ECONOMIC MOBILITY BRIDGE®

Name: _____
Date: _____

FAMILY STABILITY		WELL-BEING		FINANCIAL MANAGEMENT		EDUCATION & TRAINING	EMPLOYMENT & CAREER	
Housing	Family	Physical & Mental Health	Networks	Debts	Savings	Educational Attainment	Earned Income*	Job Quality
At least four of the following are true: ☐ I have good living conditions ☐ My name is on a lease/mortgage ☐ My home is unsubsidized ☐ My home costs 30% or less of my income ☐ I own my home	My family needs are supported enough for me to... <i>...fully engage in work, school, and home life</i> <i>[Or I have no children or dependent family members]</i>	My physical and mental health needs are met enough for me to... <i>...fully engage in work, school, and home life</i>	The networks I can rely on for resources, guidance, and support are... <i>...strong and diverse</i>	I pay down all balances monthly and have no outstanding debt other than mortgage or education loans <i>[Or I have no debt balances]</i>	I have savings of more than 3 months' expenses; I am building for my future	I have earned a Bachelor's degree or higher and/or professional license	I earn more than 80% AMI Household Size of: 2: ≥ \$104,200 3: ≥ \$117,250 4: ≥ \$130,250	My (main) job offers: ☐ benefits ☐ predictable hours ☐ opportunities to advance
Three of the above are true	<i>...mostly engage in work, school, and home life</i>	<i>...mostly engage in work, school, and home life</i>	<i>...good</i>	I am current on all payments and am paying more than minimum on at least one account	I have savings of up to 3 months' expenses	I have earned an Associate's degree or industry-recognized credential	I earn 50-79% AMI Household Size of: 2: \$65,300-\$104,199 3: \$73,450-\$117,249 4: \$81,600-\$130,249	My job offers two of the above
Two of the above are true	<i>...partly engage in work, school, and home life</i>	<i>...partly engage in work, school, and home life</i>	<i>...adequate</i>	I am current on all payments by paying the minimum on all my accounts	I have savings of 1-2 months' expenses	I have completed a job training or training certificate (after high school)	I earn 30-49% AMI Household Size of: 2: \$39,200-\$65,299 3: \$44,100-\$73,449 4: \$48,950-\$81,599	My job offers one of the above
One or none of the above are true	<i>...barely engage in work, school, and home life</i>	<i>...barely engage in work, school, and home life</i>	<i>...limited</i>	I am behind on one or more payments by 1 to 3 months	I have savings of less than 1 month's expenses	I have earned a High School Diploma or GED/HISET	I earn less than 30% AMI Household Size of: 2: < \$39,200 3: < \$44,100 4: < \$48,950	My job offers none of the above
I am not permanently housed at this time	My family needs are not supported enough for me to engage in work, school, and home life at this time	My physical and mental health needs are not met enough for me to engage in work, school, and home life at this time	I feel alone and/or my networks are unhelpful at this time	I am behind on one or more payments by over 3 months <i>[Or I do not know my debt situation at this time]</i>	I have no money saved at this time.	I have earned less than a High School Diploma or GED/HISET at this time	I do not have a job, or I am unable to work, at this time <i>*Income ranges from HUD's FY2024 Income Limits for the Boston-Cambridge-Quincy, MA-NH HUD Metro FMR Area</i>	

THINKING ABOUT THE FUTURE
MAKING DECISIONS IN CONTEXT

v2024.2.1 For the most current version of the Bridge, visit: empathus.org/Bridge/ Economic Mobility Pathways. All rights reserved.

2. Coaching:

- A minimum planned program length of at least 12 months per participant
 - *EMPath recommends a planned program length of 24-36 months*
- At least 1 hour per month of contact with active participants
- A staffing ratio of no more than 30 participants per mentor
- A dedicated Mobility Mentoring supervisor
 - *Supervisors may oversee other programs or mentor participants if implementing a smaller program*

3. Goal Setting and Recognition:

- Participants are supported in progressive goal setting aligned with the Bridge. Mentors support participants in setting goals across any of the 5 pillars of the Economic Mobility Bridge.
- Programs develop a recognition plan tied to goal attainment **inclusive of direct monetary incentives for participants**

4. Data and Evaluation:

- Utilization of a data system with the capacity for your organization to add Mobility Mentoring fields and to report on Mobility Mentoring metrics at the participant and program levels.
- Monitoring and regular reporting of Mobility Mentoring Benchmark Metrics including the following:
 - Goals set and attained by participant and pillar
 - Frequency and duration of mentoring sessions
 - Household income at baseline and annually
 - Economic Mobility Bridge Assessment Scores
 - Total incentives earned
 - Education and training completed for participants and mentors
- Administration of a comprehensive participant income assessment at baseline and annually

Budget Requirements and Guidance:

Required Budget Inclusions by Year

Proposals inclusive of the Mobility Mentoring approach must include the following items and associated amounts within their proposed budgets in MHM's application budget template. These line items are required for EMPATH's Mobility Mentoring training, evaluation support, and supervision.

Required Line Item:	Year 1	Year 2	Year 3	Year 4	Year 5
Exchange Membership (required)	\$ 5,000	\$ 2,000	\$ 2,100	\$ 2,205	\$ 2,315

MM Informed Supervision Training (required)	\$ 400				
Bi-Monthly Learning Cohort (required)	\$ 1,575	\$ 1,654	\$ 1,737	\$ 1,823	\$ 1,915
Certification Fee (required)				\$ 10,000	
Participant Incentives *\$500 per participant per year of active Mobility Mentoring Participation		*	*	*	*

Budget Guidance

The following table provides examples of budgeted items and associated guidance for the Mobility Mentoring approach that may be helpful for developing a proposed annual budget in MHM's budget template. The information included here is not exhaustive, and not all line items are required.

Example Line Items	Description/Guidance
Recruitment & Enrollment	This may include marketing, advertising, and/or outreach in conjunction with other programs or specifically for Mobility Mentoring.
Data Management & Configuration	Mobility Mentoring requires the ability to track and report on a specific set of program and participant metrics. This may require technical support in configuring an existing database or the purchase of a database. <i>Applicants planning to purchase a data system are advised to schedule office hours for advice on Mobility Mentoring data configuration.</i>
Training & Technical Assistance	Staff training and support from EMPATH is included in the required budget items. If you anticipate needing additional technical support (i.e. data management, recruitment strategies, application support, etc.), include this in the budget.
Recognition and Incentives	\$500 per participant for each year actively enrolled in Mobility Mentoring is required. Considering a ramp up period while recruiting for participation and accounting for potential attrition in the following years is recommended. Organizations may recruit new participants to account for attrition so long as they can commit to serving them for a minimum of 12 months.
Conferences and Travel	While not required, EMPATH recommends at least one staff member travel to its Disrupting Poverty Conference held every 2 years in Boston. EMPATH also recommends attending its DC Action Summit held during the alternate years. Please budget \$750 in year 2, and \$800 in year 4, per staff member planning to attend the conference for registration. Budget \$200 in year 1, \$250 in year 3, and \$300 in year 5, per staff member planning to attend the summit for its registration. It is also recommended to include travel of \$2,000 per staff member per conference/summit within the corresponding budget year. Include any anticipated local travel expenses for recruitment

	or mentoring activities as well as for attending local convenings.
Staffing	A staffing ratio of no more than 30 participants per mentor is required. EMPATH also requires a supervisor. For small programs, the supervisor may hold additional responsibilities.
Additional Financial	Some programs include additional financial support for participants; this may include emergency transportation vouchers, or a matched saving program. For a matched savings program, consider budgeting appx. \$1,000 per participant you anticipate completing the program.

Sample Budget Line Items for 50 participants:

The chart below provides additional information to support the development of the proposed annual budget across the five-year project. While this may be used as guidance, it is not inclusive of required items and is not to be replicated within the application budget section. Please refer to the guidance in the application's budget to ensure accurate completion.

Salaries & Wages/Fringe Benefits (enter position title):	Year 1	Year 2	Year 3	Year 4	Year 5
Economic Mobility Program Supervisor+ Fringe	\$ 90,000	\$ 92,700	\$ 95,500	\$ 98,000	\$ 100,000
Mobility Mentor +Fringe		\$ 60,000	\$ 62,000	\$ 63,500	\$ 22,000
Data Specialist (.25 FTE)	\$6,000	\$12,000	\$12,400	\$12,800	\$13,000

Program Expenses:	Year 1	Year 2	Year 3	Year 4
DC Action Summit (recommended)	\$ 200		\$ 250	
Disrupting Poverty Conference (recommended)		\$ 750		\$ 800
Staff travel (recommended)		\$ 2,000		\$ 2,000
Recruitment, outreach and marketing		\$ 5,000	\$ 5,000	
Incentives (\$500 per participant/yr required)		\$ 5,000	\$ 10,000	\$ 10,000
Database Configuration Support	\$10,000			